

Comprehensive Economic Development Strategy 2020-2025



Photos courtesy of Gary Halvorson, Oregon State Archives

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Cascades West Economic Development District



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About the Institute for Policy Research and Engagement



**School of Planning, Public
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Institute for Policy
Research and Engagement**

The Institute for Policy Research & Engagement (IPRE) is a research center affiliated with the School of Planning, Public Policy, and Management at the University of Oregon. It is an interdisciplinary organization that assists Oregon communities by providing planning and technical assistance to help solve local issues and improve the quality of life for Oregon residents. The role of IPRE is to link the skills, expertise, and innovation of higher education with the transportation, economic development, and environmental needs of communities and regions in the State of Oregon, thereby providing service to Oregon and learning opportunities to the students involved.

Special Thanks

We would like to thank the following individuals and organizations who provided input and feedback throughout the 2020 CEDS update process.

Cascades West Economic Development District Board Members

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Biff Traber	Mayor	City of Corvallis
Claire Hall	County Commissioner	Lincoln County
Jim Lepin	Mayor	City of Millersburg
Karun Virtue	City Councilor	City of Waldport
Sharon Konopa	Mayor	City of Albany
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Chris Pryor	City Councilor	City of Eugene
Greg James,	Board Member	Willamalane Parks and Recreation District
Heather Buch	County Commissioner	Lane County
Mary Walston	Board Member	Eugene 4J School District
Sonya Carlson	Board Member	Eugene Water and Electric Board
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Executive Summary



Overview

CWEDD is designated by the U.S. Department of Commerce Economic Development Administration (EDA) to work on economic development efforts in, Benton, Lane, Lincoln, and Linn Counties. CWEDD advocates for, supports, and coordinates regionally significant economic development activities in the region.

This regional CEDS will benefit the Cascades West region in two primary ways:

- 1 The CEDS highlights key priorities for the region in the next five years.
- 2 The CEDS identifies strategic priorities that have regional significance.

What is a CEDS?

The Comprehensive Economic Development Strategy (CEDS) contributes to effective economic development in America's communities and regions through a locally-based, regionally-driven economic development planning process.

The CEDS provides the capacity-building foundation by which the public sector, working in conjunction with other economic actors (individuals, firms, industries), creates the environment for regional economic prosperity.

-US Economic Development Administration

Spotlight on Economic Resilience

What is Economic Resilience?

- ✓ The ability to recover quickly from a shock
- ✓ The ability to withstand a shock
- ✓ The ability to avoid the shock altogether

The challenges we've confronted in 2020 have prompted rapid change and adaptation. Resilience is woven throughout this CEDS in the hopes that the next time we face wide-ranging shocks like those experienced in 2020, we'll have better tools and systems for avoiding, withstanding, and quickly recovering from disruption.

Six principles have guided decisions about CWEDD's 2020 CEDS strategic priorities, implementation structure, and performance indicators.

Principles of Economic Resilience

- 1 Diversification of industries & economic sectors
- 2 Workforce flexibility
- 3 Infrastructure redundancy and resiliency
- 4 Equitable access
- 5 Pre-disaster planning for response, continuity, & recovery
- 6 Internal coordination and external communication

District Profile



Historically, the ocean, agricultural lands, and forest lands provided a variety of harvesting, processing, and secondary processing opportunities for the region. During the 1980s, many of the region's natural resource-based businesses faced significant structural changes and began contracting. This shift in the region's employment opportunities has particularly impacted our rural areas.

Employment by Sector
(All Counties 2019)

19%

Health Care

17%

Government

15%

Retail

13%

Food & Lodging

12%

Manufacturing

12%

Business Services

Benton County

Population¹ 94,665

Area 676 sq. mi.

Median Household Income² \$58,655

County Seat Corvallis



Lane County

Population¹ 381,365

Area 4,554 sq. mi.

Median Household Income² \$49,958

County Seat Eugene



Lincoln County

Population¹ 48,305

Area 980 sq. mi.

Median Household Income² \$46,061

County Seat Newport



Linn County

Population¹ 127,320

Area 2,291 sq. mi.

Median Household Income² \$52,097

County Seat Albany



¹ Portland State University Population Research Center. (2020) "Population Estimates for Oregon and Counties as of July 1, 2020." Retrieved from: <https://www.pdx.edu/population-research/population-estimate-reports>

² US Census Bureau, American Community Survey (ACS), 5-Year Estimates. "Median household income (in 2018 dollars), 2014-2018."

SWOT Analysis

Strengths	Weaknesses	Opportunities	Threats
<p>Infrastructure Connectivity North-South</p> 	<p>Infrastructure Connectivity East-West and in Rural Areas</p> 	<p>Economic Resilience</p> 	<p>Natural Hazards and Disaster Events</p> 
<p>Supportive Business Climate</p> 	<p>Changing Demographics</p> 	<p>Connections to Existing Resources</p> 	<p>Socio-political Factors</p> 
<p>Culture of Innovation</p> 	<p>Infrastructure Quality and Availability</p> 	<p>Equity</p> 	<p>Tax Structure and Access to Funding</p> 
<p>Growing and Diverse Regional Industries</p> 	<p>Workforce Access to Essential Services</p> 	<p>New and Expanding Regional Industries</p> 	<p>Industry Shift and Adaptability</p> 
<p>Livability factors</p> 	<p>Institutional Barriers</p> 		<p>Unexpected Events and Other Unknowns</p> 
	<p>Complex Boundaries for Regional Collaboration</p> 		

Strategic Priorities

Vision

The District's preferred future includes a growing diversified and resilient economy with a range of employment opportunities that provide stable family wage jobs, lifelong learning and training opportunities, sustainable natural resources, an integrated infrastructure, and coordination among economic development efforts throughout the region.



Priority Area 1

Regional Collaboration & Partnerships



Priority Area 2

Sector Diversification through Business Development



Priority Area 3

Infrastructure Resilience



Priority Area 4

Workforce Support



Priority Area 5

Rural Vitality

- ✓ Each Priority Area contains several ideas for approaches and implementation. These *options* are a jumping off point rather than a checklist.
- ✓ Economic development practitioners and their partners, with support from CWEDD staff as capacity allows, will implement the CEDS – implementation will be a collaborative effort across many organizations.
- ✓ It is not expected that economic development practitioners will pursue all the ideas captured in this CEDS.
- ✓ Instead, economic development practitioners and their partners should work together during annual convenings organized by CWEDD to **identify which approaches they want to pursue based on the assets and strengths they are able to contribute.**





Priority Area 1: Regional Collaboration & Partnerships

Description: A regional economic development strategy is most effective when it considers and incorporates the interests and strengths of all jurisdictions in the region. By leveraging the strengths and capabilities of each county towards a wider economic strategy, the region can become more prosperous, resilient, and cohesive.

CWEDD's Role: As a regional coordinating body, the District is well positioned to facilitate collaboration. **Over the next five years,** the District will foster cross-regional relationships and seek to align efforts around regionally significant projects.



Key Partners

- ❖ Economic development staff across the region
- ❖ CWEDD Board
- ❖ Business Oregon
- ❖ Regional Solutions
- ❖ University of Oregon EDA University Center

Indicators

Collaboration: Presence of cross- and multi-jurisdictional economic development projects

Equity & Inclusion: Representativeness of CWEDD Board & Working Groups

Resilience: Incorporation of resilience considerations into regional and local economic development strategies



Priority Area 2: Sector Diversification Through Business Development

Description: Our region's businesses are the beating heart of our economy. To thrive, the region must support and retain existing businesses while also cultivating new businesses that will help diversify our economy and generate job growth. With macro-level economic changes – from globalization to shifting market structures – the regional economy will require a continued influx of fresh energy from new and existing businesses.

CWEDD's Role: The District has an opportunity to offer resources and coordination that will support local-level business retention and expansion efforts and entrepreneurial ecosystems builders. **Over the next five years,** the District will provide research capacity, serve as an information hub, and facilitate important connections between business support providers.



Key Partners

- ❖ Economic development staff
- ❖ Small Business Development Centers
- ❖ RAIN
- ❖ Chambers and other business associations

Indicators

Collaboration: Presence of referrals between business support providers

Equity & Inclusion: Representativeness of business owner demographics

Resilience: Presence of continuity of operations plans



Priority Area 3: Infrastructure Resilience

Description: Large infrastructure projects, particularly those of regional significance, often exceed the capacity and technical expertise of local municipalities. Further, they often involve multiple partners, public-private partnerships, complex regulatory systems, and strategic stakeholder engagement. To effectively achieve needed infrastructure improvements in the region, technical support will be required.

CWEDD's Role: The District is uniquely positioned to support regional infrastructure projects. **Over the next five years**, the District will provide technical assistance and connect specific projects with other resources (e.g., Regional Solutions Teams, University-based programs, state and federal agency partners, etc.).



Key Partners

- ❖ Economic development staff
- ❖ Business Oregon Infrastructure Finance Authority
- ❖ Local & county emergency managers

Indicators

Collaboration: Presence of cross- or multi-jurisdictional infrastructure projects

Equity & Inclusion: Presence of projects explicitly considering equity

Resilience: Presence of projects explicitly considering resilience and redundancy



Priority Area 4: Workforce Support

Description: Many businesses in the region report that they are struggling to find qualified employees for a range of skilled, semi-skilled, and unskilled positions, in part because of training, and in part because of livability factors like lack of affordable housing options. There is also an ongoing need to support existing workforce training efforts and to coordinate and align the efforts of the various Workforce Investment Boards (WIBs) in the region.

CWEDD's Role: Over the next five years, the District will help link education, training, apprenticeships, and career planning to the employment needs of existing and emerging business sectors. The District will also advocate for policies that will help enhance workers' quality of life.

FORD ALUMNI CENTER



Key Partners

- ❖ Economic development staff
- ❖ Workforce Investment Boards
- ❖ K-12 & higher education representatives
- ❖ Local & county planning staff

Indicators

Collaboration: Level of coordination between EDOs and WIBs

Equity & Inclusion: Percentage of cost-burdened households

Resilience: Level of coordination between education/worker-training programs and businesses



Priority Area 5: Rural Vitality

Description: Rural communities have unique economic strengths and challenges. While training and educational opportunities exist in the region, distance and other challenges can prevent rural communities from accessing those services. Lack of basic services can make rural areas less attractive to prospective residents and employers. Therefore, ensuring equitable access to basic services for residents and businesses in rural areas is a critical strategic opportunity.

CWEDD's Role: As a regional body that can work with Counties and other districts that cover unincorporated areas and smaller towns, the District plays an important role in directing resources towards rural areas. **Over the next five years**, the District will advocate for high-quality service provision to rural areas and support projects that enhance economic opportunity and resilience in rural communities.



Key Partners

- ❖ Economic development staff
- ❖ Regional tourism staff
- ❖ Rural school districts and education service districts
- ❖ Health care providers
- ❖ Local & county emergency managers

Indicators

Collaboration: Presence of multi-jurisdictional projects in rural areas

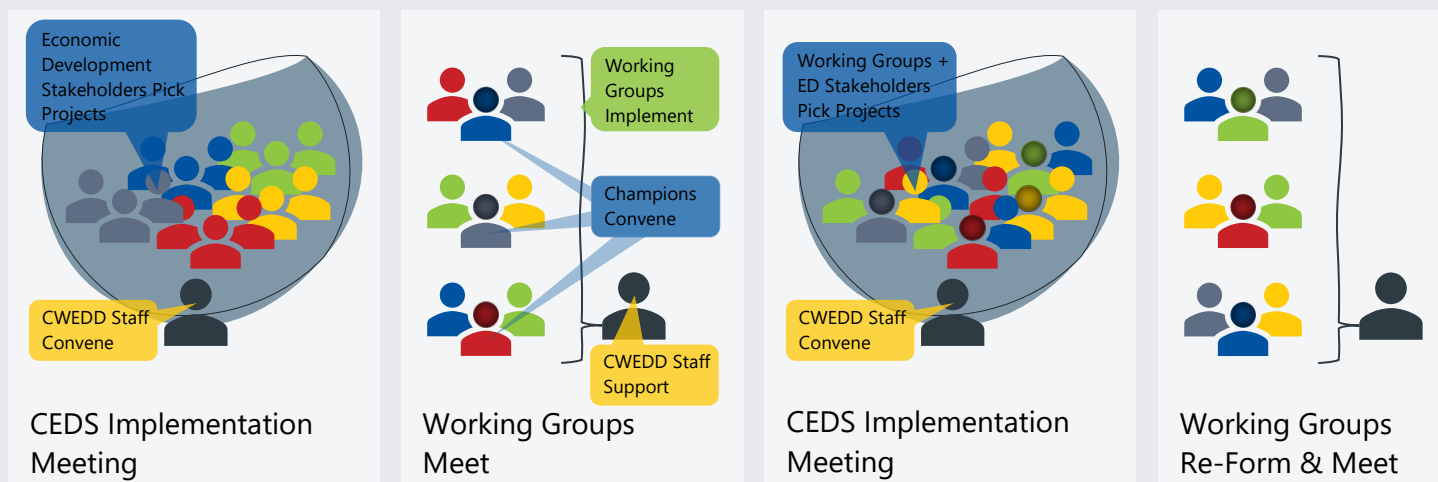
Equity & Inclusion: Access to health and education services

Resilience: Presence of rural infrastructure projects explicitly considering self-sufficiency

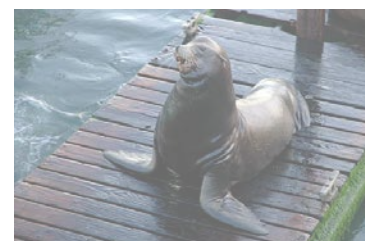
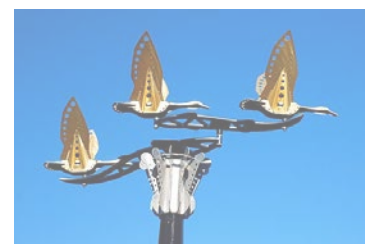
Implementation

Who Implements the CEDs & How? Key Roles & Descriptions		
CWEDD Organization		
Decision-making	CWEDD Board Decision-making body that approves regional priorities through adoption of CEDS. The CWEDD Board will provide direction to CWEDD staff as appropriate.	
Convening & Support	CWEDD Staff Conduit between decision-makers (the Board) and economic development staff. CWEDD staff will convene regional and local stakeholders through CEDS implementation meetings and provide support through outreach, facilitation aid, and relevant economic development opportunities to the region.	
Regional and Local Economic Development Stakeholders		
Advisory	QUARTERLY/SEMI-ANNUAL CEDS IMPLEMENTATION MEETINGS	Benton, Lincoln, and Linn County Economic Development Group Benton, Lincoln, and Linn County Economic Development group serves the local priorities of Benton, Lincoln, and Linn Counties. They will provide local updates during CEDS implementation meetings to support local alignment with regional priorities.
		Lane Economic Committee Lane Economic Committee (LEC) serves as an economic development advisory group to LCOG. This group will provide local updates during CEDS implementation meetings to support local alignment with regional priorities.
		Additional Practitioners and Stakeholders Additional regional and local practitioners and stakeholders may include representatives from statewide organizations, economic development organizations, business leaders, and entrepreneurs, among others. In response to the Pandemic, important cross-region coordinating groups emerged that should be leveraged in CEDS implementation. Groups like these and other individuals should provide updates on their work and add their perspective to CEDS implementation meetings.
Working Groups		
Action	Working Groups Working Groups will be formed during CEDS implementation meetings and be the action-oriented and project-focused groups that carry out regional priorities. They will be convened by a Project Champion identified from within the group. If no Champion emerges, the project should be tabled.	

Implementation Process



Timeline	Meeting Topics and Tasks
Year 1	<ul style="list-style-type: none"> ✓ CWEDD Board will adopt the updated CEDS ✓ CWEDD staff will convene CEDS implementation meetings ✓ Working Groups will be formed during CEDS implementation meetings ✓ Working Groups will set a schedule for meeting and implementation ✓ CWEDD staff will provide support as requested from Working Groups ✓ CWEDD staff will produce an end-of-year report of CEDS implementation activities, including gathering data on indicators
Years 2-4	<ul style="list-style-type: none"> ✓ CWEDD staff will continue to organize quarterly to semi-annual CEDS implementation meetings ✓ New Working Groups will be formed as necessary during CEDS implementation meetings ✓ CWEDD staff and Working Groups will record successes and challenges ✓ CWEDD staff will produce end-of-year reports of CEDS implementation activities, including gathering data on indicators
Year 5	<ul style="list-style-type: none"> ✓ CWEDD staff will convene CEDS implementation meetings as appropriate ✓ New Working Groups will be formed as necessary during CEDS implementation meetings ✓ CWEDD staff and Working Groups will record successes and challenges ✓ CWEDD staff will engage appropriate stakeholders in the CEDS review and plan update process (reserve a full year for the 2025 update) ✓ CWEDD staff will produce an end-of-year report of CEDS implementation activities, including gathering data on indicators



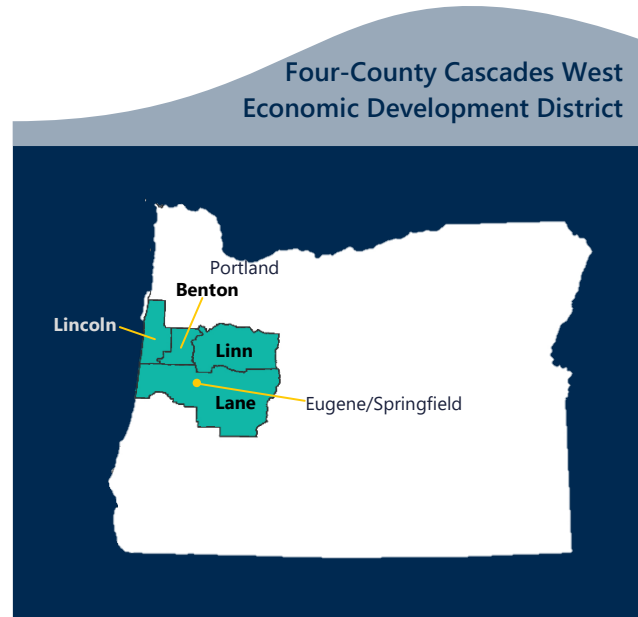
2020-2025 Comprehensive Economic Development Strategy



Introduction

Fertile valleys, abundant forest lands, pristine beaches, temperate climate, world class universities, and a culture of innovation are common to the Cascades West Economic Development District (CWEDD). Located south of the Portland Metro area, the four-county CWEDD region provides numerous examples of all that western Oregon has to offer. Complete with direct access to the West Coast's main interstate highway, rail hubs, world-class port facilities, clean water and renewable energy, it's easy to see why the region retains and attracts some of the nation's top talent and industry.

This document will guide us for the next five-years. As you read, look for ways you can contribute to the region's economic strategy. Together, we can achieve the region's economic goals.



Background

CWEDD is designated by the U.S. Department of Commerce Economic Development Administration (EDA) to work on economic development efforts in, Benton, Lane, Lincoln, and Linn Counties. CWEDD advocates for, supports, and coordinates regionally significant economic development activities in the region. The

What is a CEDS?

The Comprehensive Economic Development Strategy (CEDS) contributes to effective economic development in America's communities and regions through a locally-based, regionally-driven economic development planning process.

The CEDS provides the capacity-building foundation by which the public sector, working in conjunction with other economic actors (individuals, firms, industries), creates the environment for regional economic prosperity.

-US Economic Development Administration

CWEDD Board and their economic development partners play lead roles in defining regional community and economic development issues, opportunities, vision, goals, and work programs.

According to the EDA, a comprehensive economic development strategy (CEDS) is intended to bring together the public and private sectors in the creation of an economic roadmap to diversify and strengthen regional economies. The purpose of a CEDS is to serve as a guide for establishing regional goals and objectives, developing and implementing a regional plan of action, and identifying investment priorities and funding sources.

The EDA requires that economic development districts update their CEDS every five years pursuant to 13 C.F.R. § 303.6(3)(ii). This plan is an update to the 2015-2020 CEDS. It sets the

vision and strategy for the next five-year implementation cycle. The University of Oregon's Institute for Policy Research & Engagement (IPRE) facilitated the plan update process and prepared this plan.

The development and maintenance of the CEDS is required to qualify for EDA assistance under its public works, economic adjustment, and planning programs, and is a prerequisite for designation by the EDA as an Economic Development District.

The regional CEDS will benefit the Cascades West region in two primary ways:

- The CEDS highlights key priorities for the region in the next five years. By pooling resources and fostering collaboration, regional organizations can make progress toward achieving the region's economic vision.
- The CEDS identifies strategic priorities that have regional significance. Communities seeking to advance projects in these identified areas can use the CEDS to demonstrate that their projects are not just of local concern, but also support broader regional goals.

Economic Resilience

The challenges we've confronted in 2020 have prompted rapid change and adaptation. Work patterns have shifted as millions stay home in response to the COVID-19 pandemic. Millions more have risked health and safety to keep essential services running. The travel, dining, and in-person entertainment sectors have been hard-hit while remote communication, e-commerce, and home entertainment have boomed. Governments and politicians face a reckoning as disenfranchised Americans and their allies demand social justice reforms. The worst wildfire season on record in the West destroyed whole communities, clouded the air with toxic smoke, and reminded us of our vulnerabilities to a changing climate.

While no one could have predicted the specific mix of factors that made 2020 a year of upheaval, none of us are strangers to the far-reaching impacts of natural and human-caused disasters. Recognizing the need to plan for these risks, the EDA added new guidance in 2015 that requires CEDS to address economic resilience. Since 2015, CWEDD has been working to elevate economic resilience planning. Through efforts guided by the University of Oregon's Institute for Policy Research and Engagement (IPRE) and funded by the Federal Emergency Management Agency (FEMA), this CEDS update was founded on six core principles of economic resilience.¹

What is Economic Resilience?

Economic resilience includes three primary attributes:

1. The ability to recover quickly from a shock
2. The ability to withstand a shock
3. The ability to avoid the shock altogether

Establishing economic resilience in a local or regional economy requires the ability to anticipate risk, evaluate how that risk can impact key economic assets, and build up the capacity to mitigate and respond to that risk.

¹ The UO IPRE team reviewed a series of resources and case studies to identify core resilience principles. Based on research and information presented by Restore Your Economy, an EDA-funded website that provides up-to-date economic resilience guidance, the Stockholm Resilience Centre, a trailblazer for resilience research, and case studies highlighted by 100 Resilient Cities, a Rockefeller Foundation-supported initiative which investigated community-level resilience strategies, the IPRE team crafted six principles of resilience. Each principle highlights a different system through which communities can build resilience. Collectively, these systems work together to support economic resilience at a regional scale.

Principles of Economic Resilience

1	Diversification of industries & economic sectors	Diversity spreads risk, thereby lessening the impact of one sector's decline on the overall economy.
2	Workforce flexibility	A workforce with a wide variety of skills that are transferrable across industries can adapt to industry shifts.
3	Infrastructure redundancy and resiliency	Redundant and back-up infrastructure, as well as infrastructure that has been built to withstand disruption, is less vulnerable to natural- and human-created incidents.
4	Equitable access	Communities that have been chronically under-resourced or discriminated against (like rural communities, immigrant communities, Black communities, and Indigenous communities) require additional attention and resources to ensure the opportunity gap does not further widen as a result of natural- and human-created incidents.
5	Pre-disaster planning for response, continuity, and recovery	Energy and resources directed toward planning BEFORE disaster strikes helps communities bounce back more quickly.
6	Internal coordination and external communication	Coordination of economic development service providers to create an alignment of strategy, resources, and investments produces a coherent approach to economic development that can be more easily communicated and accessed by businesses and the workforce.

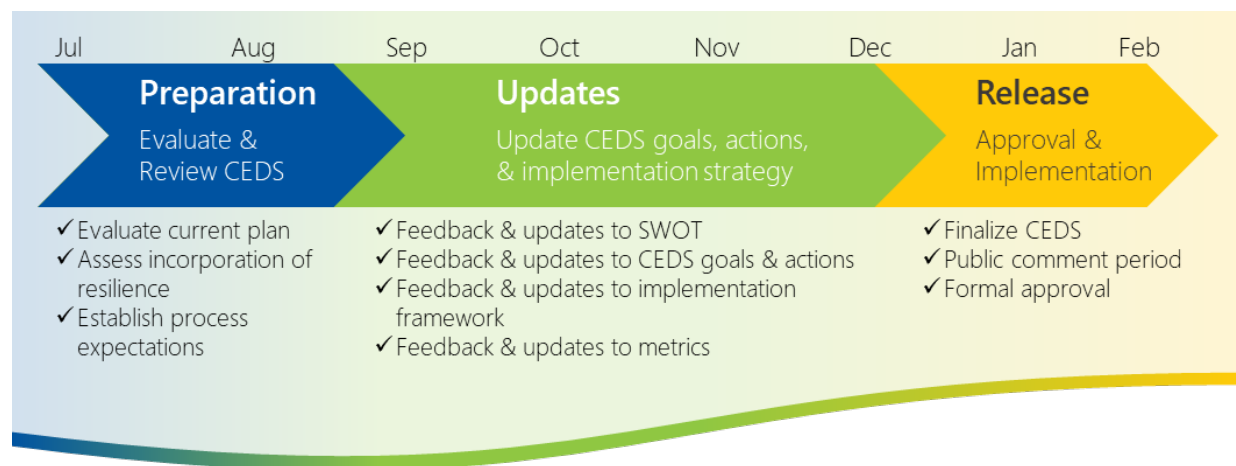
These six principles have guided decisions about CWEDD's 2020 CEDS strategic priorities, implementation structure, and performance indicators. While we honor and celebrate the hard work of economic developers, emergency managers, and others who responded to the crises of 2020, we also know there is always room for improvement. Resilience is woven throughout this Strategy in the hopes that the next time we face wide-ranging shocks like those experienced in 2020, we'll have better tools and systems for avoiding, withstanding, and quickly recovering from disruption.

Process and Methods

The EDA requires economic development districts update their CEDS every five years pursuant to 13 C.F.R. § 303.6(3)(ii). The process and contents contained in this Strategy are intended to meet the federal

requirements for CEDS. Because the 2015 CEDS update was a complete overhaul of the strategy, the CWEDD Board elected to complete a “light” update for 2020. This update focuses on adjusting the CEDS goals (renamed Strategic Priority Areas) and creating a more realistic implementation strategy. It does not include updates to the data appendices that contain information about the Region’s demographic and economic conditions, community resources, natural resources – these figures should be updated during the 2025 CEDS update process.

In coordination with CWEDD staff, the IPRE team led the CWEDD Board and interested regional stakeholders in a series of workshops to revise the 2015 SWOT, Strategic Priorities, Implementation Strategy, and Performance Indicators. Stakeholders who were not able to attend monthly meetings contributed ideas and feedback by filling out monthly questionnaires and reading summaries of the CEDS update workshops.



Organization of this Report

The 2020-2025 CWEDD CEDS is organized into two sections: the Main Plan and the Appendices.

Main Plan

<u>Introduction</u>	Provides background on the CEDS, describes the methods used to update it and presents the overall structure of the document.
<u>District Profile</u>	Presents a summary of the region’s economic development conditions. <i>Note: Economic conditions data was not updated for this CEDS but should be during the 2025 update process.</i>
<u>SWOT Analysis</u>	Presents a summary of the District’s strengths, weaknesses, opportunities and threats.
<u>Strategic Priorities</u>	Presents the District’s vision and five strategic priorities areas, accompanied with suggested approaches, implementation ideas, and performance indicators.
<u>Implementation</u>	Presents the organizational structure of the District and a framework for engaging economic development practitioners from across the region in CEDS implementation through interest-based working groups.

Appendices

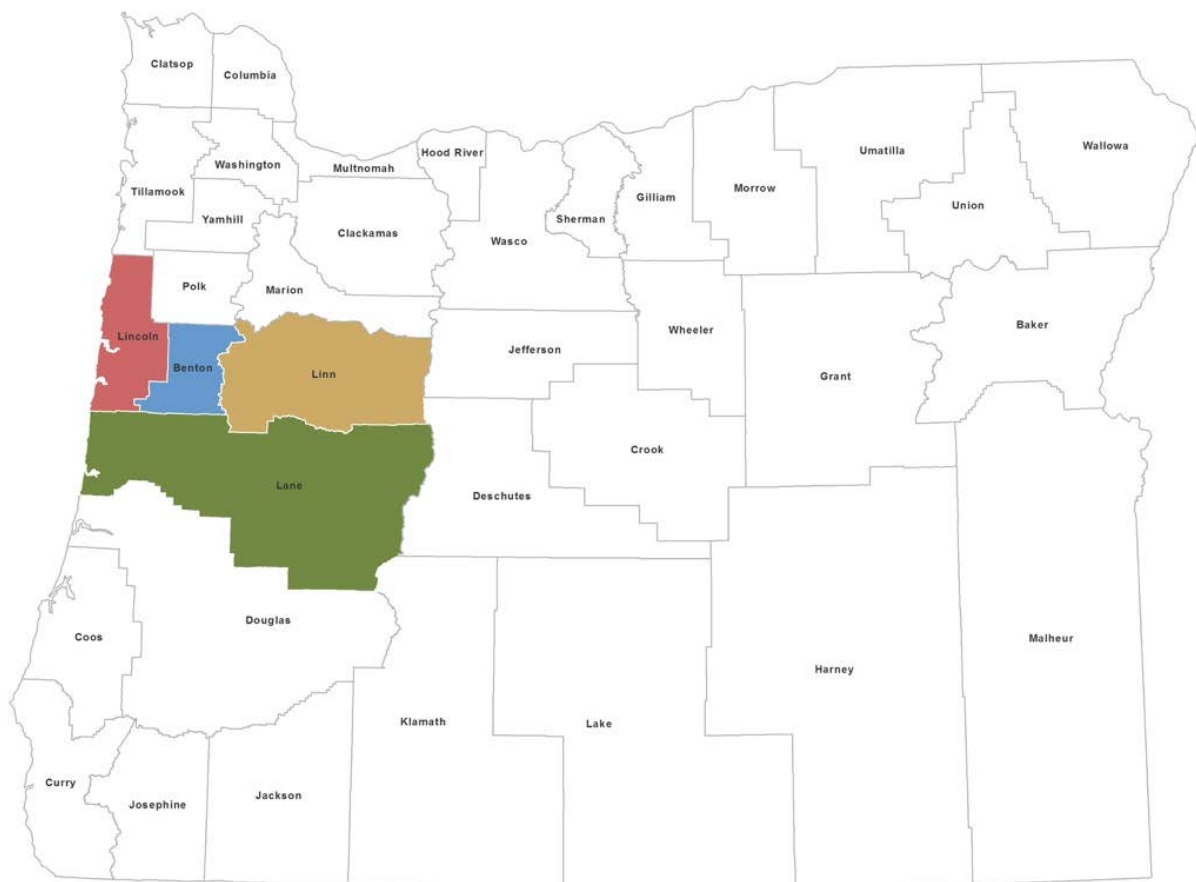
<u>Appendix A: Plan Update Process & Resources</u>	Provides details about the 2020 update process, including summaries from monthly CEDS update meetings and survey results from four questionnaires distributed throughout the update process.
<u>Appendix B: Community Profile</u>	<p>Links to appendices from the 2015 CEDS that provide:</p> <ul style="list-style-type: none">✓ Socioeconomic Profile: Presents demographic and economic data about the region. These can serve as economic indicators for the region.✓ Community Resources: Presents information about resources and characteristics of the region's communities and jurisdictions related to economic development in the region✓ Natural Resources: Presents information about the region's natural systems that have an influential role on the region's economic development efforts. <p>The data contained in these appendices are from 2015 and was not updated as part of this CEDS update process. It should be updated as part of the 2025 CEDS update process.</p>

District Profile

This section summarizes key characteristics of the region and provides background on the region's economic development situation. The conditions outlined in this section lay the foundation for the Strengths, Weaknesses, Opportunities, and Threats Assessment and the CEDS Strategic Priorities. For additional detail, please refer to [Appendix B](#) of this plan. This section, together with information contained elsewhere in this report, satisfies 13 C.F.R. § 303.7(b)(i).

Location

The planning region for the Cascades West Economic Development District is the four-county area of Benton, Lane, Lincoln, and Linn Counties. The region is located in the center of western Oregon, stretching from the Pacific Ocean eastward over the Coast Range and through the Willamette Valley to the crest of the Cascade Range.



Geography & Climate

The region extends from sea level at the Pacific Ocean in the west to over 10,000 feet at the crest of the Cascades in the east. The southern end of the Willamette Valley surrounds the major population centers located along the Interstate 5 corridor. The Willamette River runs north through the valley toward its mouth at the Columbia River. Primary and secondary agricultural lands support a variety of agricultural industries and businesses in the region.



Photo Source: Gary Halvorson, Oregon State Archives

The region has a temperate climate with moderate differences between summer high and winter low temperatures. The region receives between 40 and 90 inches of rainfall per year and a warm relatively dry summer promoting timber growth and a large agricultural sector.

Natural Environment

The region's unique geography, including the fertile Willamette River Valley, Cascade and Coast Range foothills, and coastal influences, contributes greatly to its agricultural productivity - producing high-value nursery stock, world-class vineyards, and establishing the region as the Christmas tree and the grass seed "capital of the world." Forestlands are important to the Cascades West region for their economic, environmental, recreational, and quality of life benefits. Forest lands cover approximately 75% of the region, with roughly 50% of the region in State or Federal forest land.

Demographics

The population in the region generally aligns with the state overall in terms of gender, age, and race/ethnicity. According to the U.S. Census American Community Survey (2018), 51% of the population in the region is female and 49% is male. Nearly one-in-five people in the region are under the age of 18 and 66% of the regional population is of working age (15-64 years). Of that, just over one third (36%) are between 25 and 54. Populations that do not identify solely as white accounted for 14% of the population in 2018.

The Oregon Office of Economic Analysis projects that the region will grow roughly 33% by 2050. By comparison, the projection for the state overall for the same period is 46%. Notably, Linn County is expected to grow by roughly 44% by 2050 while Lincoln County is expecting growth of only 22%. Through 2050, Benton and Lane Counties expect to grow by 30% and 32% respectively.

Significantly, in-migration is expected to accelerate, with in-migration accounting for 83% of regional population growth through 2040. Predictions are that coastal populations will continue to age and that net population growth in coastal areas will come from in-migration.

Benton County		Lane County	
Population ²	94,665	Population ¹	381,365
Area	676 sq. mi.	Area	4,554 sq. mi.
Median Household Income ³	\$58,655	Median Household Income ²	\$49,958
County Seat	Corvallis	County Seat	Eugene
Lincoln County		Linn County	
Population ¹	48,305	Population ¹	127,320
Area	980 sq. mi.	Area	2,291 sq. mi.
Median Household Income ²	\$46,061	Median Household Income ²	\$52,097
County Seat	Newport	County Seat	Albany

Economy

Historically, the ocean, agricultural lands, and forest lands provided a variety of harvesting, processing, and secondary processing opportunities for the region. Despite boom-bust cycles, the extraction and processing of the region's natural resources generally provided a solid economic base through the 1970s.

During the 1980s, many of the region's natural resource-based businesses faced significant structural changes and began contracting. While the entire region was impacted by this shift, many of the region's rural communities suffered severe hardships, as their relatively narrow natural resource-based economies were unable to replace industries and jobs lost.

Health care, retail trade, accommodation and food services, manufacturing, and professional and business services are the five private sectors that employ the most people. Together, these sectors account for 70% of the region's employment in 2019.⁴ Just under 17% of employment is in government, respectively by sector in the region.⁵ Approximately 80% of employees live and work within the region. Roughly 60% of the jobs in the region are located in Lane County with Linn (17%), Benton (15%), and Lincoln (7%) accounting for the remainder.

² Portland State University Population Research Center. (2020) "Population Estimates for Oregon and Counties as of July 1, 2020." Retrieved from: <https://www.pdx.edu/population-research/population-estimate-reports>

³ US Census Bureau, American Community Survey (ACS), 5-Year Estimates. "Median household income (in 2018 dollars), 2014-2018."

⁴ State of Oregon Employment Department. Employment and Wages by Industry (QCEW), 2019.

⁵ *Ibid.*

SWOT Analysis

The Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis considers the internal factors (strengths and weaknesses) and external factors (opportunities and threats) that influence economic development in the CWEDD region. The following sub-sections summarize the SWOT analysis findings. The SWOT analysis stems from three main sources of input:

- Discussion and feedback from CEDS update working group meetings from July-September 2020
- Results from stakeholder surveys distributed from August-September 2020
- Previous engagement during the 2015-2020 CEDS update review




Refer to [Appendix A](#) or [2015-2020 CEDS](#) for additional information. This section, together with information contained elsewhere in this report, satisfies 13 C.F.R. § 303.7(b)(ii).

Strengths

The CWEDD region is host to numerous growing industries that support economic diversification and resilience. The natural resources and mild climate of Benton, Lane, Lincoln, and Linn counties support a growing tourist and recreation sector and make it an attractive place to live. Multiple research institutions and accelerators throughout the region, as well as several higher education institutions, foster a strong entrepreneurial culture in the CWEDD region. Organizations like RAIN (Regional Accelerator & Innovation Network) promote innovation and connect entrepreneurs to the resources and capital they need to grow Oregon's entrepreneurial infrastructure. Infrastructure connectivity, especially running north to south, supports multiple functions of travel, trade, research, and industry.

The following present key strengths identified during the SWOT analysis.

Infrastructure Connectivity North-South 	<ul style="list-style-type: none">• Direct access to Interstate 5• Multi-use ocean ports for fishing, research and trade• Existing infrastructure for rail, freight, and air• Expanding fiber infrastructure• Intermodal transfer center in Millersburg
Supportive Business Climate 	<ul style="list-style-type: none">• Small business support (e.g. Chambers of Commerce, Small Business Development Centers)• Workforce training centers• Councils of Government (LCOG, OCWCOG)• UO Economic Development Administration University Center• Multiple economic development related non-profits and foundations• Regional Solutions Team (statewide)

Culture of Innovation 	<ul style="list-style-type: none"> • Business incubators and accelerators (e.g. RAIN, the Corvallis Foundry) • Research institutes and higher education institutions • Proven track record of successful business starts (e.g. Nike, Garage Games, Molecular Probes) • Rural housing and development incentives that support business start-ups
Growing and Diverse Regional Industries 	<ul style="list-style-type: none"> • Agriculture • Natural textiles • Bioscience • Software and technology, including university-related spinoffs • Food and beverage manufacturing • Value-added forest products • Metals manufacturing and other advanced manufacturing • Maritime industry • Higher education-related research clusters • Recreation and tourism
Livability factors 	<ul style="list-style-type: none"> • Mild climate • Access to and value for nature and the outdoors • Quality of place for growing population segments (i.e. retirees, families, aging baby boomers, climate migrants, etc.) • Access to higher education opportunities through universities and community colleges

Weaknesses




CWEDD is a large and diverse region. Due to the range in size, scale, and resource-base of its local economies, there are challenges in meeting local priorities under a broader regional strategy. Real and perceived divides exist between rural and urban areas; coast, valley, and mountain; jurisdictional boundaries; and private and public sectors. These factors contribute to challenges in coordination and communication across the economic ecosystem. The impacts of limited collaboration have manifested as institutional barriers such as a lack of regional brand and difficulties in connecting services to needs. Complex jurisdictional boundaries create additional obstacles to collaboration through misaligned service boundaries, duplicated efforts, competition for funds, and siloed efforts by sector.

Across the region, the workforce experiences obstacles to accessing the basic needs of housing and childcare. There is a high demand for and limited supply of affordable housing, particularly within close proximity to economic opportunities. The distance of housing to employment opportunities coupled with limited access to public transportation creates a weakness in the region that can further exasperate economic disparities between demographic groups.




Demographics within the region have been shifting alongside statewide trends. Oregon’s population, and similarly CWEDD’s population, are becoming increasingly diverse in terms of race and ethnicity.⁶ However, Oregon remains one of the least diverse states in the country. Anticipating the shifting needs of the region’s population as demographics shift will support regional economic development efforts to meet the needs of an aging population, increasing numbers of retirees, children, and young adults, and increased in-migration of Latino/a/x and Hispanic and Asian, Hawaiian, and Pacific Islander groups.

The connectedness and quality of infrastructure is a regional weakness. The lack of connections between the coast and the valley present obstacles for trade, travel, and distribution of goods. The COVID-19 global pandemic has underscored the importance of accessible and high-speed broadband across the region as many people have had to transition to remote work and education, particularly in rural areas. However, the connections of fiber infrastructure to small and/or rural locations has yet to be built out. Additionally, infrastructure readiness is an obstacle to attracting or expanding businesses in the region. Lack of funds to connect infrastructure or make necessary updates to aging infrastructure compound issues of connectedness and quality.

The following present key weaknesses identified during the SWOT analysis.

<p>Infrastructure Connectivity East-West and in Rural Areas</p> 	<ul style="list-style-type: none"> • Limited broadband access, particularly in rural areas • Limited east-west connectivity • Lack of rail connections to the coast • Limited regional airport service • Limited accessible regional public transportation • Lack of multi-modal transfer stations between valley and coast
<p>Changing Demographics</p> 	<ul style="list-style-type: none"> • Aging population and increasing number of retirees resulting in smaller pool of potential workers • Lack of skilled labor force
<p>Infrastructure Quality and Availability</p> 	<ul style="list-style-type: none"> • Lack of funding to upgrade aging physical infrastructure (e.g. transportation, water, sewer, etc.) • Lack of quality last-mile infrastructure on many development sites

⁶ Oregon Office of Economic Analysis. (2019). “Oregon’s Demographic Trends.” Retrieved from https://www.oregon.gov/das/OEA/Documents/OR_pop_trend2019.pdf

Workforce Access to Essential Services 	<ul style="list-style-type: none"> • High demand for and limited supply of affordable housing • Lack of affordable housing in proximity to economic opportunity • High housing costs relative to wages • Limited access to childcare
Institutional Barriers 	<ul style="list-style-type: none"> • Lack of regional brand • Limited regional collaboration and partnership • Lack of a unified and equitable regional vision for economic development • Government regulations that make it challenging and expensive to do business • Lack of financial support services for start-ups • Disconnect between training centers and opportunities with labor force
Complex Boundaries for Regional Collaboration 	<ul style="list-style-type: none"> • Jurisdictional competition within the region • Lost economic development opportunities due to lack of collaboration • Duplication of economic development efforts • Competition from other metro areas • Overlapping or misaligned service boundaries of economic development organizations causing inconsistencies to the services available in different areas of the District (e.g. three Workforce Investment Boards are present in the District) • Lack of collaboration across private and public sectors • Lack of collaboration across geography (coast/mountains/valley and rural/urban)



Opportunities

The CWEDD region is filled with unrealized potential in terms of coordination and collaboration, growing regional industries, and the promotion of livability of the area. Specifically, survey respondents, project stakeholders, and members of the CWEDD Board all emphasized increased regional coordination and collaboration as a key economic development opportunity. Increased coordination and collaboration could support increased diversity in representation within economic development, stronger connections between the workforce and existing resources and opportunities, increased opportunities and spaces for innovation to occur, and increased adoption of equitable practices across the region.

The region is home to new and expanding industries. Emerging green business and renewable energy industries align with the region's value of nature and the outdoors. New and expanding industries such as value-added forest products, marijuana, and craft beer and wine have the potential to contribute energy to the region's existing culture of entrepreneurship and innovation. These factors, in addition to access to higher education opportunities, make the region an attractive place to live for a growing population. CWEDD can capitalize on livability as a marketable asset for the region.

Response to COVID-19 has highlighted the adaptability of local industries. Some examples include swift changes to business models in order to produce emergency-related supplies. These include breweries producing hand sanitizer or garment manufacturers producing personal protective equipment. Additionally, local jurisdictions coordinated on weekly calls to delegate and manage federal dollars and provide support for businesses and the workforce.

The following present key opportunities identified during the SWOT analysis.

Economic Resilience 	<ul style="list-style-type: none"> Industries that can quickly adapt business models to produce emergency response products. (Ex. Breweries producing hand sanitizer or garment manufacturers producing PPE) Jurisdictional capacity to delegate emergency funds New relationships and collaborations formed through the necessity of responding to COVID-19
Connections to Existing Resources 	<ul style="list-style-type: none"> Connect the workforce with existing services and organizations focused on training and education Partner with K-12 education institutions to increase youth involvement in economic development Market the region's livability Align existing work of practitioners with the CEDS Increased collaboration between organizations/jurisdictions on funding proposals and resource-sharing
Equity 	<ul style="list-style-type: none"> Diversify representation in economic development positions of leaders and decision-making Renewed attention to civil rights issues Increasing access to essential services, such as childcare or housing, that can support low-income households, parents, women, and BIPOC members of the workforce
New and Expanding Regional Industries 	<ul style="list-style-type: none"> New and expanding markets (e.g. value-added forest products, marijuana, tourism, craft beer and wine, etc.) Green business Renewable energy California and Washington markets

Threats

CWEDD is vulnerable to a number of threats tied to the region's natural resources and location. For example, the region is susceptible to chronic (e.g. flood and wildfire) and catastrophic (e.g. subduction zone earthquake and tsunami) natural hazards. The region is also susceptible to hazards and unexpected events felt on a national and global scale. These include the global health crisis of the COVID-19



pandemic, a historic wildfire season, and civil unrest stemming from civil rights protests and the national political climate.

An economic recession is expected globally. As places around the world enact measures to contain and limit the COVID-19 pandemic, the economic impact will be the worst experienced since the Great Depression, although not all sectors will be affected in the same way.⁷ In its World Economic Outlook, the International Monetary Fund (IMF) reports predictions that the global economy would shrink by 3% in 2020. The IMF expects the American economy to contract by 6% in 2020. The Oregon Economic and Revenue Forecast reports that the recession within the state may be better than initially feared as it was reported in May of 2020.⁸ As of fall 2020, Oregon expects that the labor market will return to health in 2023, one year faster than originally predicted.

Despite the shift in outlook, Oregon must still grapple with the conditions 2020 has brought including, wildfires, the pandemic, protests, drought, and working from home. All these variables are experienced on a regional level, especially as the region felt the destruction of the Holiday Farm Fire in Lane County, the Echo Mountain Fire Complex in Lincoln County, the Santiam Canyon Fire in parts of Linn County, and the cumulative impact of wildfire smoke across all four counties.

Additional external threats are exacerbated by economic recession including access to funding and regional shifts in dominant industries. Lack of stable tax-funding and capital for early-stage companies can create challenges for planning, starting, and maintaining economic development projects and entrepreneur efforts. The region overall is still grappling with the impacts of shifts from natural resource and manufacturing-based to service-based economies, and now some service-based industries (like tourism) have been particularly hard-hit by the COVID-19 pandemic.

The following present key threats identified during the SWOT analysis.

Natural Hazards and Disaster Events 	<ul style="list-style-type: none">• Chronic natural hazards (e.g. floods, winter storms, wildfires, landslides, etc.)• Catastrophic natural hazards (e.g. Cascadia subduction zone earthquake and tsunami)• Expected and unanticipated impacts from climate change• Limited capacity to implement disaster plans for local jurisdictions• Impacts from COVID-19 on workforce and business operations and tourism industry
Socio-political Factors 	<ul style="list-style-type: none">• National/international economic downturn• U.S. political climate causing uncertainties about the availability and reliability of federal assistance• Historical inequality of economic opportunity

⁷ Rappeport, A., & Smialek, J. (2020). I.M.F. Predicts Worst Downturn Since the Great Depression. Retrieved October 17, 2020, from <https://www.nytimes.com/2020/04/14/us/politics/coronavirus-economy-recession-depression.html>

⁸ Oregon Office of Economic Analysis. (2020.) Oregon Economic and Revenue Forecast (Vol. XL, No.3). Retrieved from <https://www.oregon.gov/das/OEA/Documents/forecast0920.pdf>

<p>Tax Structure and Access to Funding</p> 	<ul style="list-style-type: none"> • Decreasing gas tax revenue • Oregon's lack of a sales tax means there can be major fluctuations in available funding • Lack of capital for early-stage companies
<p>Industry Shift and Adaptability</p> 	<ul style="list-style-type: none"> • Declining natural resource availability • Variable ability to shift business models and workforce skills to respond to natural hazards or disaster events
<p>Unexpected Events and Other Unknowns</p> 	<ul style="list-style-type: none"> • The increased intensity and impact of wildfires • Short and long-term impacts of COVID-19 as both a human-health and economic crisis • Complexity of managing multiple crises and disaster events

Strategic Priorities

This section outlines strategic priorities for the Cascades West Economic Development District (CWEDD) over the next five years, along with indicators for assessing progress. CWEDD's five strategic priorities are accompanied by suggested approaches and implementation ideas that can guide progress in each of the priority areas. [Appendix A](#) includes details about the development of CWEDD's strategic priorities. This section, together with information contained elsewhere in this report, satisfies 13 C.F.R. § 303.7(b)(iii).

Regional Economic Vision & Strategic Priorities

The Comprehensive Economic Development Strategy (CEDS) vision describes the District's ideal economic development future for the region. The vision guides the District's work and the content of the CEDS Strategic Priorities. The District worked collaboratively to reach a shared vision that respects the goals and capacities of each community, nurtures and supports both existing and new businesses, and works to establish a multi-dimensional economy.

Vision

The District's preferred future includes a growing diversified and resilient economy with a range of employment opportunities that provide stable family wage jobs, lifelong learning and training opportunities, sustainable natural resources, an integrated infrastructure, and coordination among economic development efforts throughout the region.

To move the District towards this vision, CWEDD has identified five Strategic Priority Areas where action should be concentrated.

	Priority Area 1	Regional Collaboration & Partnerships
	Priority Area 2	Sector Diversification through Business Development
	Priority Area 3	Infrastructure Resilience
	Priority Area 4	Workforce Support
	Priority Area 5	Rural Vitality

Each Priority Area includes **Approaches** (tactics that economic developers should follow to improve outcomes in the Priority Area), **Implementation Ideas** (suggestions for how economic developers might

execute the approaches), **Indicators** (factors that CWEDD will measure to track progress), and **Key Partners** (groups/organizations that will be important to engage in projects related to the strategies).

Additionally, each Priority Area provides commentary on three **Key Considerations** that regional partners identified as important elements to weave into all elements of CWEDD's approach to economic development:

- **Regional Collaboration** – How will a regional approach to these strategies support economic prosperity?
- **Equity & Inclusion** – How will these strategies build a more equitable and inclusive region?
- **Resilience** – How will these strategies build regional resilience?

Why Strategic Priorities?

The CEDS Strategic Priorities are a reimagining of the Action Plan included in the 2015-2020 CEDS. Workshops and interviews with economic development practitioners and others whose work touches economic development in the CWEDD region highlighted several important points:

- The CEDS is our region's primary source of a collective economic vision, so it is important for it to be accessible and useful
- The 2015-2020 CEDS Action Plan and Action Item Forms were cumbersome and slightly confusing
- While economic developers worked tirelessly on supporting our region's businesses and workforce over the past five years, these efforts were not always tied to the strategies and actions listed in the 2015-2020 CEDS Action Plan, and district-wide coordination seldom occurred
- Flexible guiding strategies are more useful than specific, prescriptive actions because practitioners need the flexibility to shape the specifics of economic development initiatives to guidance from their elected officials
- Metrics or indicators associated with CEDS priorities would help create accountability and allow for clear evaluation of progress on the regional priorities

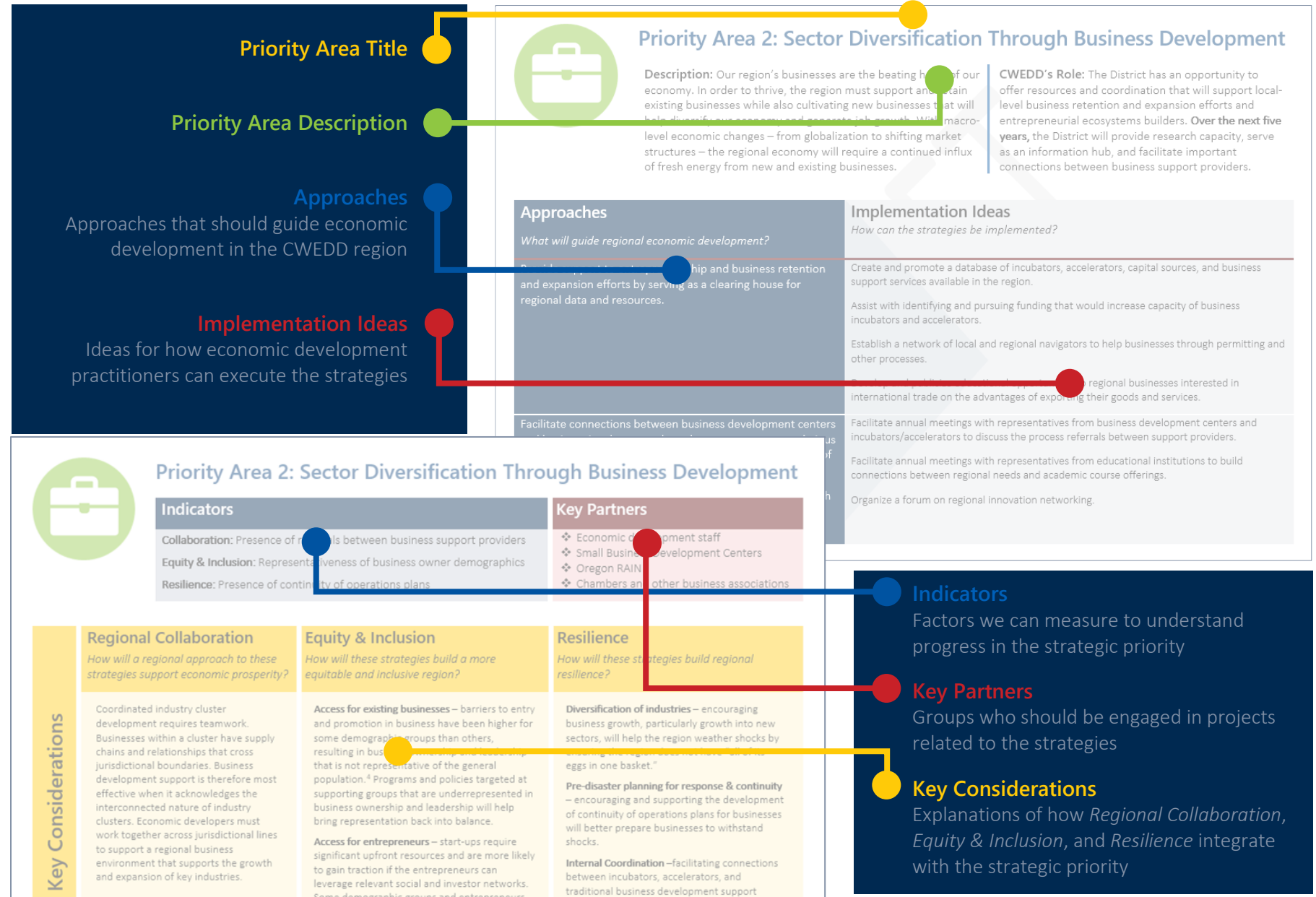
Based on these findings, the 2020-2025 CEDS offers a new approach to guiding and measuring progress on CWEDD's strategic priorities. Rather than a detailed, step-by-step action plan, this section provides a flexible framework for our region's economic developers. The approaches listed in this section provide general direction, but *how* economic developers choose to execute these approaches should be based on the assets and strengths they bring and the specific needs of their communities.

The 2020-2025 Strategic Priorities section also offers a different method for measuring progress. Rather than judging the CEDS based on actions completed, the region should track and quantify key indicators that can demonstrate whether CWEDD is making progress on its strategic priorities.

Using the Strategic Priorities

Each Priority Area contains several ideas for approaches and implementation. These *options* are a jumping off point rather than a checklist. It is not expected that economic developers will pursue all the ideas captured in this CEDS. Instead, economic developers and their partners should work together during annual convenings organized by CWEDD to identify which approaches they want to pursue based on the assets and strengths they are able to contribute. Working groups composed of practitioners from across the region will form around these identified opportunities to make progress on the CEDS strategic priorities. CWEDD will measure progress based on a series of indicators rather than actions completed. Refer to the [Implementation](#) chapter for additional details.

Priority Area Layout





Priority Area 1: Regional Collaboration & Partnerships

Description: A regional economic development strategy is most effective when it considers and incorporates the interests and strengths of all jurisdictions in the region. By leveraging the strengths and capabilities of each county towards a wider economic strategy, the region can become more prosperous, resilient, and cohesive.

CWEDD's Role: As a regional coordinating body, the District is well positioned to facilitate collaboration. **Over the next five years,** the District will foster cross-regional relationships and seek to align efforts around regionally significant projects.

Approaches <i>What will guide regional economic development?</i>	Implementation Ideas <i>How can the strategies be implemented?</i>
Build relationships and collaboration through project-based regional initiatives.	Convene economic development practitioners from across the region quarterly or semi-annually to brainstorm, revise, and prioritize a list of regionally significant projects.
Integrate the priorities captured in the CEDS into existing local- and regional-scale initiatives.	Economic development practitioners who are familiar with the CEDS should engage economic development practitioners who are new to the region or the CEDS in a CEDS overview/onboarding process. City and County economic development staff should deliver an annual CEDS overview and update to elected officials.
Increase CWEDD's staff capacity so CWEDD can provide more support to regional initiatives.	Seek funding to add at least 1 Full Time Equivalent (FTE) staff support position to CWEDD. Create a regional economic development organization chart that clearly identifies the linkages and roles of all economic development agencies in the CWEDD region (house on CWEDD website).
Increase representation of currently underrepresented business, workforce, and education interests on the CWEDD Board and CEDS project working groups by including more perspectives from Tribes, Latino/a/x communities, Black communities, immigrant communities, rural communities, and low-income communities.	Review CWEDD Board representation and recruit new members that can speak to the perspectives of underrepresented groups, including but not limited to: Tribes, Latino/a/x communities, Black communities, immigrant communities, rural communities, and low-income communities.



Priority Area 1: Regional Collaboration & Partnerships, cont.

Approaches, cont.

What will guide regional economic development?

Invest in continuity of operations planning for all economic development support providers so these entities can continue providing response and recovery assistance post-shock.

Foster a coordinated approach to economic resilience and recovery planning efforts across the region.

Implementation Ideas, cont.

How can the strategies be implemented?

Work with emergency managers to create inventories of local businesses capable of providing services, material, equipment, and workforce in the event of a disaster. Then develop pre-approved contracting with these businesses to allow for immediate access post-shock.

Ensure representation for business interests emergency preparation, mitigation, response, and recovery planning processes by requesting space on planning committees for economic development practitioners and business representatives.

Form economic recovery teams that include business representatives and convene regularly to create regional economic recovery plans.

Develop local recovery ordinance model language that jurisdictions can adopt.



Priority Area 1: Regional Collaboration & Partnerships, cont.

Indicators

Collaboration: Presence of cross- and multi-jurisdictional economic development projects

Equity & Inclusion: Representativeness of CWEDD Board & Working Groups

Resilience: Incorporation of resilience considerations into regional and local economic development strategies

Key Partners

- ❖ Economic development staff across the region
- ❖ CWEDD Board
- ❖ Business Oregon
- ❖ Regional Solutions
- ❖ University of Oregon EDA University Center

Key Considerations

Equity & Inclusion

How will these strategies build a more equitable and inclusive region?

Representation – by including and involving a more representative set of perspectives from the communities served by CWEDD in CWEDD committees and initiatives, economic development projects have a better chance of meeting the needs of everyone in our region, not just those who traditionally held the most power and influence over decision-making and resource allocation.

Resilience

How will these strategies build regional resilience?

Internal Coordination –economic development efforts in the CWEDD region have not been well coordinated in the past, leading to missed opportunities for collective impact. When we begin to align our efforts, collaborating around resources rather than competing over them, we can spread the benefits of economic development more broadly, building a region that is less vulnerable to economic downturns.

External Communication – lack of internal coordination leads to confusing, ineffective communication to businesses and workers. Increasing collaboration among economic development supporters will foster a more unified, streamlined message to the business community and our workforce, aiding our ability to respond quickly and effectively to economic crises.



Priority Area 2: Sector Diversification Through Business Development

Description: Our region's businesses are the beating heart of our economy. In order to thrive, the region must support and retain existing businesses while also cultivating new businesses that will help diversify our economy and generate job growth. With macro-level economic changes – from globalization to shifting market structures – the regional economy will require a continued influx of fresh energy from new and existing businesses.

CWEDD's Role: The District has an opportunity to offer resources and coordination that will support local-level business retention and expansion efforts and entrepreneurial ecosystems builders. **Over the next five years,** the District will provide research capacity, serve as an information hub, and facilitate important connections between business support providers.

Approaches

What will guide regional economic development?

Provide support to entrepreneurship and business retention and expansion efforts by serving as a clearing house for regional data and resources.

Facilitate connections between business development centers and business incubators and accelerators to create an obvious bridge of support between the start-up and growth phases of new businesses.

Facilitate connections between educational institutions (both K-12 and higher education) and business incubators and accelerators to foster a culture of entrepreneurship.

Implementation Ideas

How can the strategies be implemented?

Create and promote a database of incubators, accelerators, capital sources, and business support services available in the region.

Assist with identifying and pursuing funding that would increase capacity of business incubators and accelerators.

Develop a business registration or tracking system that will allow the collection of more and better data about businesses' needs.

Establish a network of local and regional staff who can help businesses navigate through permitting and other processes.

Develop and publicize educational opportunities about the advantages of international trade for regional businesses that are interested in expanding into new markets.

Facilitate annual meetings with representatives from business development centers and incubators/accelerators to discuss the process referrals between support providers.

Facilitate annual meetings with representatives from educational institutions to build connections between regional needs and academic course offerings.

Organize a forum on regional innovation networking.



Priority Area 2: Sector Diversification Through Business Development, cont.

Approaches, cont.

What will guide regional economic development?

Work to ensure that the demographics of business owners and entrepreneurs are representative of the race and gender distributions in the region.

Provide start-ups and existing businesses with resources and incentives to develop, test, and implement continuity of operations plans.

Develop emergency recovery revolving loan funds and other creative financing options before shocks so that businesses can immediately access financial assistance post-shock.

Implementation Ideas, cont.

How can the strategies be implemented?

Assess the demographic distribution of business owners and entrepreneurs who are accessing services and develop or support programs specifically targeted to demographic groups that are underrepresented. Intentionally seek out grassroots efforts that may already be occurring to support these businesses and offer to collaborate.

Work with Small Business Development Centers (SBDCs), incubators, and accelerators to develop low-effort business continuity of operations planning resources.

Discuss potential shocks, threats, disasters and risk reduction strategies at local chamber or business association “Lunch and Learn” events to encourage businesses to create continuity of operations plans.

Incentivize investments in business resilience for businesses that have business continuity plans (e.g. reduce business license fees; 1% reduction in property taxes (or other tax) for businesses that have an employee preparedness training program; expedite plan review for hazard retrofit/mitigation projects).

Utilize external funding (such as the FEMA Hazard Mitigation Grant Program and Community Development Block Grants) to leverage local funds for business-related mitigation activities.



Priority Area 2: Sector Diversification Through Business Development

Indicators

Collaboration: Presence of referrals between business support providers

Equity & Inclusion: Representativeness of business owner demographics

Resilience: Presence of continuity of operations plans

Key Partners

- ❖ Economic development staff
- ❖ Small Business Development Centers
- ❖ RAIN
- ❖ Chambers and other business associations

Key Considerations

Regional Collaboration

How will a regional approach to these strategies support economic prosperity?

Coordinated industry cluster development requires teamwork. Businesses within a cluster have supply chains and relationships that cross jurisdictional boundaries. Business development support is therefore most effective when it acknowledges the interconnected nature of industry clusters. Economic developers must work together across jurisdictional lines to support a regional business environment that supports the growth and expansion of key industries.

Equity & Inclusion

How will these strategies build a more equitable and inclusive region?

Access for existing businesses – barriers to entry and promotion in business have been higher for some demographic groups than others, resulting in business ownership and leadership that is not representative of the general population.⁹ Programs and policies targeted at supporting groups that are underrepresented in business ownership and leadership will help bring representation back into balance.

Access for entrepreneurs – start-ups require significant upfront resources and are more likely to gain traction if the entrepreneurs can leverage relevant social and investor networks. Some demographic groups and entrepreneurs in rural areas may have more limited access to resources and networks. When economic developers work specifically to assist underrepresented groups, they create a more representative pipeline of new business owners.

Resilience

How will these strategies build regional resilience?

Diversification of industries – encouraging business growth, particularly growth into new sectors, will help the region weather shocks by ensuring the region does not have “all of its eggs in one basket.”

Pre-disaster planning for response & continuity – encouraging and supporting the development of continuity of operations plans for businesses will better prepare businesses to withstand shocks.

Internal Coordination –facilitating connections between incubators, accelerators, and traditional business development support providers will lead to a better alignment of resources.

⁹ In 2018, 11% of Oregon’s small businesses (businesses with fewer than 500 employees, which make up 99.4% of all Oregon businesses) were minority-owned, according to the [2018 Small Business Profile](#) from the US Small Business Administration. In 2019, 25% of Oregon’s population was not white alone and not Hispanic or Latino (American Community Survey, 2019: ACS 1-Year Estimates Data, Table DP05).



Priority Area 3: Infrastructure Resilience

Description: Large infrastructure projects, particularly those of regional significance, often exceed the capacity and technical expertise of local municipalities. Further, they often involve multiple partners, public-private partnerships, complex regulatory systems, and strategic stakeholder engagement. In order to effectively achieve needed infrastructure improvements in the region, technical support will be required.

CWEDD's Role: The District is uniquely positioned to support regional infrastructure projects. **Over the next five years**, the District will provide technical assistance and connect specific projects with other resources (e.g. Regional Solutions Teams, University-based programs, state and federal agency partners, etc.).

Approaches <i>What will guide regional economic development?</i>	Implementation Ideas <i>How can the strategies be implemented?</i>
Identify and prioritize projects of regional importance that will (1) improve quality of place for residents and (2) increase diversity and redundancy in the region's infrastructure (particularly critical infrastructure related to transportation, energy, communications, and fuel).	Survey regional partners annually to develop a project list and convene a conversation about how to ensure these projects support resilience and are coordinated across the region. Work with property owners and businesses located within hazard zones to develop strategies to harden, elevate, re-locate or otherwise mitigate / prevent damage from natural hazards. Encourage local practitioners to support the update of the economic development sections of comprehensive plans by encouraging resilience considerations for employment land.
Coordinate regional efforts to expand broadband availability in areas with the least access.	Increase collaboration around broadband development by convening regional economic development practitioners to discuss efforts and share resources.
Incorporate equity assessments during infrastructure planning to ensure the benefits and potential negative impacts of development are equitably distributed across the population.	Develop an equity checklist to apply during project planning; the checklist can help identify project shortcomings and encourage modifications that will lead to a more equitable distribution of impacts.
Promote available services and funding sources that can be accessed via CWEDD to support infrastructure development.	Create a section on the CWEDD Website to list current funding opportunities for local jurisdictions that includes grant deadlines, eligibility information, and connections to current and planned projects.
Increase the capacity and resources available to support grant writing and technical project development for infrastructure projects.	Create a section on the CWEDD Website to serve as a library of past funding applications that be used as a resource for developing successful new funding applications. Increase staff time at COGs dedicated to helping with preparing funding applications and providing technical assistance on infrastructure project development.



Priority Area 3: Infrastructure Resilience, cont.

Indicators

Collaboration: Presence of cross- or multi-jurisdictional infrastructure projects

Equity & Inclusion: Presence of projects explicitly considering equity

Resilience: Presence of projects explicitly considering resilience and redundancy

Key Partners

- ❖ Economic development staff
- ❖ Business Oregon Infrastructure Finance Authority
- ❖ Local & county emergency managers

Key Considerations

Regional Collaboration

How will a regional approach to these strategies support economic prosperity?

Although many infrastructure projects occur at a local scale, it is always important to consider regional connections, particularly when planning for diversity and redundancy. By keeping a finger on the pulse of many local projects, economic development practitioners can encourage regional considerations during conversations about infrastructure development.

Equity & Inclusion

How will these strategies build a more equitable and inclusive region?

Access – research shows that lower-income communities and communities of color are disproportionately impacted by the negative externalities of infrastructure development (like pollution from industrial development and displacement by highway construction), while these same communities don't always see the full benefits of projects.¹⁰ Considering equity during the planning process for infrastructure projects can help mitigate these trends. It is also important to remember that equitable benefit is different than equal benefit – to address past discrimination and lack of access, some projects will require more investment in some communities compared to others.

Resilience

How will these strategies build regional resilience?

Infrastructure redundancy and resiliency – focusing on projects that create redundant infrastructure (back-up systems that will take over if the primary system fails) and resilient infrastructure (systems that can withstand disruption for either natural or human-created incidents) will put CWEDD in a strong position to bounce back quickly from disruption.

Equitable access – developing broadband and other critical infrastructure in underserved communities will uplift areas that have suffered economically because they lacked access to high-quality essential services.

Internal Coordination – working collectively across the region to identify important projects will ensure a more coordinated and collaborative approach to seeking funding.

¹⁰ Glover Blackwell, Angela and Anita Cozart. "How Smart, Targeted Infrastructure Investment Can Pave the Way for an Equitable Nation." Urban Institute, 1/23/18.
<https://www.urban.org/infrastructure/how-smart-targeted-infrastructure-investment-can-pave-way-equitable-nation>



Priority Area 4: Workforce Support

Description: Many businesses in the region report that they are struggling to find qualified employees for a range of skilled, semi-skilled, and unskilled positions, in part because of training, and in part because of livability factors like lack of affordable housing options. There is also an ongoing need to support existing workforce training efforts and to coordinate and align the efforts of the various Workforce Investment Boards (WIBs) in the region.

CWEDD's Role: Over the next five years, the District will help link education, training, apprenticeships, and career planning to the employment needs of existing and emerging business sectors. The District will also advocate for policies that will help enhance workers' quality of life.

Approaches <i>What will guide regional economic development?</i>	Implementation Ideas <i>How can the strategies be implemented?</i>
Support deliberate coordination between businesses, Workforce Investment Boards (WIBs), and educational institutions to help identify and provide for current employer needs.	Facilitate annual meetings between representatives from educational institutions, WIBs, and key business sectors to (1) identify current and predicted workforce skill needs and (2) consider curriculum changes that will support the development of these skills. Partner with local workforce development programs, including WIBs, to increase participation of local businesses in apprenticeships, internships and On-The-Job-Training programs, in order to build pathways to employment for persons entering the workforce.
Attract and retain younger talent by promoting the region's livability and access to exceptional nature and outdoor recreation opportunities.	Work with Destination Marketing Organizations to prepare marketing material specifically geared towards attracting new workers to the area and demonstrating the region's benefits to recent graduates.
Investigate and support policies and projects that will increase the availability of affordable housing, affordable transportation options, the quality and accessibility of recreation, access to broadband, access to healthcare, and other factors that enhance quality of life.	Encourage practitioners to participate in discussions at the local and county levels related to affordable housing, transportation, recreation, and healthcare access – ask to have representation for economic development practitioners and business representatives on committees and working groups. Work with statewide economic development groups like the Oregon Economic Development Association (OEDA) and Oregon's Economic Development Districts (OEDD) to have a state and national lobbying presence advocating for policies that will increase the availability of and access to affordable housing, transportation, recreation, health care, and broadband.



Priority Area 4: Workforce Support, cont.

Indicators

Collaboration: Level of coordination between EDOs and WIBs

Equity & Inclusion: Percentage of cost-burdened households

Resilience: Level of coordination between education/worker-training programs and businesses

Key Partners

- ❖ Economic development staff
- ❖ Workforce Investment Boards
- ❖ K-12 & higher education representatives
- ❖ Local & county planning staff

Key Considerations

Regional Collaboration

How will a regional approach to these strategies support economic prosperity?

Workforce Investment Boards (WIBs) are critical economic development partners. The CWEDD region overlaps with three different WIBs, making regional coordination particularly important. CWEDD can play a role in aligning the efforts of our region's WIBs with the needs of our businesses and the capacity of our educational institutions.

Equity & Inclusion

How will these strategies build a more equitable and inclusive region?

Access – many residents in the CWEDD region struggle to stay afloat amid high living costs. With economic inequality on the rise,¹¹ CWEDD must support efforts to ensure residents have options for earning a living wage and affordable access to housing, transportation, recreation, broadband, and health care. Making headway on these issues will play a key role in reducing economic inequality.

Resilience

How will these strategies build regional resilience?

Workforce flexibility – pushing for more strategic connections between our workforce development sector and our educational institutions will help better align the skills of our workers with the needs of our businesses. By better aligning efforts, we give our workforce an appropriate and transferrable skill that will allow the region to pivot quickly into new sectors as our economy adapts to new technology and consumer demands.

Equitable access – supporting policies that ensure basic needs are met (like access to affordable housing and high-speed internet) removes stressors from the lives of our workers, allowing them to focus their energy on contributing to our region's businesses.

Internal Coordination – in part because of the mis-aligned geographies of WIBs and EDDs, our region has sometimes struggled to coordinate efforts related to workforce development. By intentionally focusing on building stronger coordination between WIBs and other economic development practitioners, we can create a more coherent system of support for our region's workforce.

¹¹ Hauser, Daniel and Juan Carlos Ordóñez. "Income Inequality in Oregon Notched New Record Prior to COVID-19 Crisis." Oregon Center for Public Policy, 10/1/20. <https://www.ocpp.org/2020/10/01/income-inequality-oregon-new-record/>



Priority Area 5: Rural Vitality

Description: Rural communities have unique economic strengths and challenges. While training and educational opportunities exist in the region, distance and other challenges can prevent rural communities from accessing those services. Lack of basic services can make rural areas less attractive to prospective residents and employers. Therefore, ensuring equitable access to basic services for residents and businesses in rural areas is a critical strategic opportunity.

CWEDD's Role: As a regional body that can work with Counties and other districts that cover unincorporated areas and smaller towns, the District plays an important role in directing resources towards rural areas. **Over the next five years,** the District will advocate for high-quality service provision to rural areas and support projects that enhance economic opportunity and resilience in rural communities.

Approaches <i>What will guide regional economic development?</i>	Implementation Ideas <i>How can the strategies be implemented?</i>
Prioritize strategies that support the growth of tourism and value-added natural resource industries (including ecotourism, marine-related activities, sustainable farming, and local food and beverage production) to enhance economic opportunities in rural areas.	<p>Work with local Main Street programs to identify and secure funding for downtown revitalization projects.</p> <p>Work with Destination Marketing Organizations and the Willamette Valley Visitors Association to develop and market local value-added products.</p> <p>Develop/sustain business retention and expansion programs in rural communities with a particular emphasis on succession planning for businesses at risk of closing.</p>
Support efforts to provide high-quality K-12 education in rural areas.	Meet regularly with K-12 school administrators and Education Service District representatives to understand students' needs and lend support to projects aimed at meeting these needs.
Support efforts to increase health care and telehealth care access in rural areas.	Meet regularly with health care providers and public health officials to understand rural patients' needs and lend support to projects aimed at meeting these needs.
Emphasize infrastructure self-sufficiency in rural areas to ensure communities can sustain themselves in the event a disaster cuts off access to transportation systems and urban centers.	Develop a self-sufficiency checklist to apply during project planning; the checklist can help identify project shortcomings and encourage modifications that will ensure rural areas can sustain themselves without outside help.



Priority Area 5: Rural Vitality, cont.

Indicators

Collaboration: Presence of multi-jurisdictional projects in rural areas

Equity & Inclusion: Access to health and education services

Resilience: Presence of rural infrastructure projects explicitly considering self-sufficiency

Key Partners

- ❖ Economic development staff
- ❖ Regional tourism staff
- ❖ Rural school districts and education service districts
- ❖ Health care providers
- ❖ Local & county emergency managers

Key Considerations

Regional Collaboration

How will a regional approach to these strategies support economic prosperity?

Our region's rural areas must work together to increase access to basic services and cultivate promising new economic sectors. While each community has unique needs and identities, far more unites our rural areas than divides them. County and other regional economic development practitioners should facilitate collaboration and sharing among rural communities. This will help coalesce multiple communities behind funding proposals and projects, increasing the likelihood of their success.

Equity & Inclusion

How will these strategies build a more equitable and inclusive region?

Access — many public services are concentrated in urban areas, making them difficult to access for residents of rural areas who do not have reliable transportation or high-speed internet connections. By highlighting the needs of rural residents and advocating for systems of service provision that are accessible in rural areas, economic developers can bring attention and resources to an underserved population.

Resilience

How will these strategies build regional resilience?

Diversification of industries/economic sectors — Oregon's rural economies have experienced significant decline in part because they lacked economic diversity. Encouraging the diversification of the industries that support our rural areas will increase rural areas' ability to withstand and bounce back from future economic shocks.

Infrastructure redundancy and resiliency — building out self-sufficient infrastructure in rural places will decrease dependency on far-away support systems. Since many disasters may cut off access to these support systems, self-sufficient and back-up infrastructure will be critical to survival.

Internal Coordination —coalescing rural communities around specific funding proposals will increase competitiveness since many funders prioritize collaborative efforts. While a single community on its own may have trouble competing with the comparatively vast resources available in urban areas, pooling rural communities' resources and voices will increase their likelihood of gaining attention and traction.

Implementation

This chapter presents the implementation framework for the 2020-2025 CEDS. It focuses on creating accountability among partners for activating regional projects and maintaining the CEDS as a regionally relevant and up-to-date document. The first section outlines the changes in implementation structure from the 2015-2020 CEDS. The next section describes key roles and responsibilities of CWEDD and partners in implementation. The remainder of the chapter lays out a schedule for plan maintenance and plan review. This includes a schedule for CEDS partners to meet, identify regional projects, and record successes and challenges. This chapter, together with information contained elsewhere in this report, satisfies 13 C.F.R. § 303.7(b)(iii).

Implementation Structure

A successful implementation structure facilitates collaboration among regional partners by creating clear systems of accountability, defining a shared understanding of roles, and uses measurable indicators of success. The following sections describe changes made to the implementation structure for the 2020-2025 CEDS that resulted from discussions with CWEDD staff, the CWEDD Board, and other interested parties who participated in the update process. These changes represent a renewed commitment to CEDS implementation through collaboration and leveraging the existing capacity of regional economic development groups and practitioners.

Stakeholders identified the need for CWEDD leadership to convene working groups and provide support and resources to ensure the CEDS is a practical tool for routine use. CWEDD staff were identified as the key convener for CEDS implementation in this update. CWEDD staff, supported by OCWCOG and LCOG staff and CWEDD board members, will provide adequate staff time to organize working groups around priority projects and assist with elements of project implementation and coordination.

CWEDD staff will convene CEDS implementation by bringing together economic development practitioners and any additional stakeholders on a quarterly to semi-annual basis. These meetings will support regional collaboration and CEDS implementation by identifying regional priority projects and forming Working Groups based on those projects. Working Groups will be based on regional priority projects instead of topical interests (as they were in the 2015-2020 CEDS). Working Groups will consist of local and regional economic development staff and other partners, and each Working Group will require a Project Champion to initiate meetings and move the project forward. Outside of meetings, CWEDD staff will function as a conduit for communication between the CWEDD Board and the Working Groups. CWEDD will be available to provide support and resources to the Working Groups if needed.

The following table describes the new implementation structure. This structure is intended to fit the existing capacity of CWEDD and all involved CEDS partners. It recognizes that collaboration is integral to successful implementation and that the CWEDD region is still actively cultivating regional relationships.

CEDS IMPLEMENTATION	CWEDD Organization	
	Decision-making	CWEDD Board Decision-making body that approves regional priorities through adoption of CEDS. The CWEDD Board will provide direction to CWEDD staff as appropriate.
	Convening & Support	CWEDD Staff Conduit between decision-makers (the Board) and economic development staff. CWEDD staff will convene regional and local stakeholders through CEDS implementation meetings and provide support through outreach, facilitation aid, and relevant economic development opportunities to the region.
	Regional and Local Economic Development Stakeholders	
	Advisory	Benton, Lincoln, and Linn County Economic Development Group Benton, Lincoln, and Linn County Economic Development group serves the local priorities of Benton, Lincoln, and Linn Counties. They will provide local updates during CEDS implementation meetings to support local alignment with regional priorities.
		Lane Economic Committee Lane Economic Committee (LEC) serves as an economic development advisory group to LCOG. This group will provide local updates during CEDS implementation meetings to support local alignment with regional priorities.
		Additional Practitioners and Stakeholders Additional regional and local practitioners and stakeholders may include representatives from statewide organizations, economic development organizations, business leaders, and entrepreneurs, among others. In response to the Pandemic, important cross-region coordinating groups emerged that should be leveraged in CEDS implementation. Groups like these and other individuals should provide updates on their work and add their perspective to CEDS implementation meetings.
	Working Groups	
	Action	Working Groups Working Groups will be formed during CEDS implementation meetings and be the action-oriented and project-focused groups that carry out regional priorities. They will be convened by a Project Champion identified from within the group.

Implementation Roles

CWEDD Board

The 2020-2025 CEDS recognizes the CWEDD Board as the District's governing body. The CWEDD Board oversees the CEDS update process and implementation, participates in regular board meetings to discuss regional projects and priorities, and reports local updates to the District. Board members should provide support to economic development efforts, facilitate regional collaboration and networking, and communicate local successes or challenges, which will support CEDS implementation. Board members may participate in the CEDS implementation meetings and choose to become members of Working Groups given their availability and capacity.

The CWEDD Board should be representative of the region's professional, geographic, and demographic make-up. Professional representation should include members such as elected officials, economic development practitioners, sector professionals, and representatives from the business community. Geographic representation may include members at the county level, city level, and belonging to urban or rural localities. Demographic representation should accurately reflect the region and consider gender identity, race and ethnicity, foreign-born individuals, and age, among other demographic measures, as necessary identities to diversify board membership.

CWEDD Staff

The primary role of CWEDD staff will be to convene CEDS implementation meetings and support Working Groups. This responsibility includes outreach, event organization, meeting facilitation, and participating in Working Groups as necessary. The type of support CWEDD staff provide will be determined by a Project Champion for each Working Group. Support may include research and data-gathering, outreach via email or CWEDD's website, connection to regional networks, and updates on relevant CEDS implementation work. Lastly, CWEDD staff will act to streamline communications between the CWEDD Board, local economic development groups, and practitioners participating in the CEDS implementation meetings and Working Groups. This may be

CWEDD Board	
Role	Governing body of CWEDD
	Oversees CEDS update and implementation
	Makes decisions about regional priorities
	Supports implementation within their jurisdiction
Membership	Elected officials at the county and city level
	Economic development professionals
	Business and sector representatives
	Urban and rural representatives
	Representatives from diverse identities and experiences reflective of regional demographics

CWEDD Staff	
Role	Convene CEDS implementation meetings
	Provide regional resources to the economic development network
	Provide support to the Board and Working Groups as identified
	Support communication between the CWEDD Board, regional and local stakeholders, and Working Groups

operationalized as providing updates during CWEDD Board meetings, conducting outreach or updates on the CWEDD website, direct communication with individuals, or through an annual CEDS implementation update report.

Regional and Local Economic Development Stakeholders

The work of implementation falls to local economic development groups and practitioners. Many of these groups and individuals have been working on projects that speak to regional priorities but have had little connection to the CEDS in the past. By formally recognizing these groups as integral to CEDS implementation, this update has been designed to work as a practical tool for guiding regional economic development efforts and providing opportunities for local economic development groups and practitioners to access federal partners and funding.

This update proposes to harness the existing capacity of Benton, Lincoln, and Linn County Economic Development Group, convened by OCWCOG, and the Lane Economic Committee, convened by LCOG. The role of these groups in implementation includes regular discussion of regional priorities and projects at their own meetings and participation in quarterly or semi-annual CEDS implementation meetings convened by CWEDD staff. Members of these groups may then opt to participate in Working Groups given interest, capacity, and existing work.

The role of local economic development practitioners in CEDS implementation includes attendance and participation at quarterly or semi-annual CEDS implementation meetings convened by CWEDD staff. During CEDS implementation meetings, practitioners should communicate their sector's or organization's priorities and discuss relevant successes and challenges from their perspective. They may also opt to participate in Working Groups to act on the CEDS Strategic Priorities. Additionally, local economic development practitioners may engage with CEDS implementation in the following ways:

- Sharing the CEDS priorities with their sector's or organization's members and leadership and aligning the CEDS priorities where possible with the priorities of their sector or organization
- Communicating desired economic development resources to the District

Regional and Local Economic Development Stakeholders

Role

Attend and participate in CEDS implementation meetings

Share and discuss local priorities, projects, or goals

Communicate resources that can be shared with other local stakeholders

Communicate needs to support regional partnerships or resource-sharing

Share and discuss local successes and challenges in economic development

Communicate outcomes of CEDS implementation meetings back to localities and networks

Engage in regional collaboration

Membership

Existing members of local economic development groups

Representatives from statewide organizations

Large and small business representatives

Entrepreneurs

Representatives from Workforce Investment Boards

Economic development practitioners

Representatives from local or regional economic development organizations or nonprofits

Working Groups

Working Groups are the mechanism through which coordinated, regional implementation of the CEDS priorities will occur. Working Groups will be formed as a result of quarterly to semi-annual CEDS implementation meetings and based on regional priority projects. Working Group membership will be decided at CEDS implementation meetings and may include economic development practitioners and other stakeholders from across the four-county region based on interest, capacity, or the alignment of existing work.

The change to Working Group structure is to maintain energy and accountability for priority project implementation. In the 2015-2020 CEDS, Working Groups were based on four topics: Regional Economic Development Practitioners, Entrepreneur and Innovation, Workforce Development, and Rural Development. The majority of these groups did not meet during the five-year period and defaulted to working within their own localities. The new structure of Working Groups based on projects rather than topics is intended to encourage sustained participation—it is easier to motivate a group around a specific project idea rather than an abstract topic. Working Groups should also have clear leadership from a Project Champion and convening assistance from CWEDD staff. This level of structure was missing from 2015-2020 Working Groups and should help the new Working Groups achieve more success.

Project Champions will be responsible for convening their Working Groups, with some assistance from CWEDD staff. They will coordinate outreach to Working Group members, create meeting agendas, and communicate project needs to CWEDD staff. If no one volunteers to be a Project Champion, it is a good indication that the project may not have enough energy to sustain it – the project should be tabled until a champion emerges.

Working Groups	
Role	Carry out the on-the-ground implementation of regional priority projects
	Identify a Project Champion
	Set a realistic meeting schedule, tasks, and project milestones
	Record successes and challenges to measure performance
	Attend CEDS implementation meetings and report back to the wider group of stakeholders
Project Champion	Communicate with appropriate networks to support implementation
	Engage in regional collaboration
	Convene the working group
Membership	Reach out to CWEDD as needed
	Guide the group in creating schedules, agendas, defining tasks, and project milestones
	Membership will be dependent on interest, capacity, and existing work and may include:
	Regional and local practitioners
	Members of economic development groups, organizations, or nonprofits
	CWEDD Board members
	Business representatives
	Entrepreneurs
	WIB representatives
	And more!

Plan maintenance

Plan maintenance is a critical component of the CEDS. This section presents a basic five-year schedule and generalized work program. The schedule is intended to guide CWEDD staff and Working Groups with an appropriate timeline, meeting objectives, and a timeframe for tracking indicators outlined in the strategic priority framework. CWEDD staff will have the primary responsibility for the meeting schedule of the quarterly or semi-annual CEDS implementation meetings. Working Groups will determine their own meeting schedule dependent on their needs and the requirements of the project identified.

Implementation Schedule

The following table describes the proposed schedule for CEDS implementation meetings. The frequency of meetings on a quarterly or semi-annual basis will be determined by CWEDD staff as necessary.

Timeline	Meeting topics and tasks
Year 1	<ul style="list-style-type: none"> ✓ CWEDD Board will adopt the updated CEDS ✓ CWEDD staff will convene CEDS implementation meetings ✓ Working Groups will be formed during CEDS implementation meetings ✓ Working Groups will set a schedule for meeting and implementation ✓ CWEDD staff will provide support as requested from Working Groups ✓ CWEDD staff will produce an end-of-year report of CEDS implementation activities, including gathering data on indicators
Years 2-4	<ul style="list-style-type: none"> ✓ CWEDD staff will continue to organize quarterly to semi-annual CEDS implementation meetings ✓ New Working Groups will be formed as necessary during CEDS implementation meetings ✓ CWEDD staff and Working Groups will record successes and challenges ✓ CWEDD staff will produce end-of-year reports of CEDS implementation activities, including gathering data on indicators
Year 5	<ul style="list-style-type: none"> ✓ CWEDD staff will convene CEDS implementation meetings as appropriate ✓ New Working Groups will be formed as necessary during CEDS implementation meetings ✓ CWEDD staff and Working Groups will record successes and challenges ✓ CWEDD staff will engage appropriate stakeholders in the CEDS review and plan update process (reserve a full year for the 2025 update) ✓ CWEDD staff will produce an end-of-year report of CEDS implementation activities, including gathering data on indicators

CEDS Implementation Meetings

CEDS implementation meetings are the catalyst for regional collaboration and CEDS implementation. CWEDD staff will take the lead in convening quarterly to semi-annual CEDS implementation meetings. Those in attendance may consist of, but not be limited to, the following stakeholders:

- CWEDD Board members
- Benton, Lincoln, Linn Economic Development Group members
- Lane Economic Committee members
- Practitioners from across the four-county region
- Local and regional business leaders and representatives
- Representatives from statewide EDOs, such as Business Oregon and Regional Solutions
- Representatives from Workforce Investment Boards (WIBs)
- Representatives from Small Business Development Centers

CWEDD staff will coordinate scheduling, agendas, and outreach for CEDS implementation meetings. The list below describes potential meeting objectives to guide CEDS implementation meetings:

- Updates from local economic development groups and practitioners on their existing work
- Updates from the CWEDD staff or board on regional resources, support, and/or funding
- Determining regional priority projects that align with the strategic priority areas of the CEDS and/or the interests and existing work of EDOs and practitioners
- Identifying a Project Champion for each priority project
- Forming Working Groups around priority projects where a Project Champion has been identified
- Recording successes and challenges encountered during the implementation process and making any necessary adjustments

CWEDD staff may also convene regional workshops or presentations that support economic development efforts, either as part of CEDS implementation meetings or as stand-alone events.

Annual CEDS Report

CWEDD staff will produce an annual CEDS report based on implementation activities held throughout the year. An annual report is intended to inform local and regional economic development groups and practitioners on CEDS progress as well as track the indicators detailed in this plan. Annual CEDS reports will support the next plan review cycle and provide an avenue for recognizing and celebrating successful regional projects.

Plan Review Cycle

The EDA requires that CEDS be updated every five years for designation as an Economic Development District. This review cycle also ensures that the strategy remains a current and useful guide for regional economic development efforts. As described in the previous section, CWEDD staff should focus year five of implementation on engaging the CWEDD Board, local economic development groups, and other stakeholders to make updates to each section of this plan. Creating annual reports and tracking metrics throughout the cycle will support an efficient CEDS update process, but the District should reserve an entire year for the 2025 update. This update will likely be more extensive than the 2020 update since it will have been 10 years since a major overhaul of the strategy was last completed. Once the CEDS is updated, the CWEDD Board will move forward with its adoption after a 45-day public plan review period.

Appendix A: Plan Update Process & Resources

This appendix includes summaries of the workshops and questionnaires used to gather input to update the CEDS. After a kickoff meeting with the CWEDD Board in July 2020, CWEDD convened three workshops with Board members and interested stakeholders to discuss different aspects of the CEDS:

- **August 20, 2020** – SWOT and Preliminary Action Plan Discussion
- **October 15, 2020** – Implementation Structure Discussion
- **November 19, 2020** – Performance and Evaluation Framework Discussion

In lieu of a meeting in September (the meeting was cancelled because of the ongoing wildfire crisis affecting the CWEDD region), stakeholders were asked to review a memo about options for updating the CEDS action plan and provide feedback through a questionnaire. This memo and questionnaire results are also included in this appendix.

This appendix includes the following materials:

1. August 2020 Meeting Summary – SWOT & Action Plan Discussion
2. SWOT Questionnaire Results
3. Action Items Questionnaire Results
4. September 2020 Action Framework Update Findings & Recommendations Memo
5. Action Plan Findings & Recommendations Questionnaire Results
6. October 2020 Meeting Summary – Implementation Structure
7. November 2020 Meeting Summary – Performance and Evaluation Framework
8. Success Measure Questionnaire Results



Date: 08/24/20

To CWEDD Board, Staff, and Interested Parties
From Aniko Drlik-Muehleck, Aqsa Khan, and Melissa Graciosa, Institute for Policy Research & Engagement
SUBJECT AUGUST 2020 MEETING SUMMARY – SWOT & ACTION PLAN DISCUSSION

OVERVIEW

On August 20, 2020, 32 members of the Cascades West Economic Development District (CWEDD) met to discuss updates to the Comprehensive Economic Development Strategy (CEDS). The August meeting focused on updating the Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis and the CEDS Action Plan. A team from the University of Oregon's Institute for Policy Research & Engagement (IPRE) facilitated the meeting. This was the second of the CWEDD CEDS update meetings.

Meeting Goals & Activities

The meeting had three main goals:

- Brainstorm what to add to or change about the SWOT Analysis
- Develop some guidelines for how to reformat the Action Plan
- Discuss appropriate scale and scope for the Action Plan

Before diving into discussion about the SWOT and Action Plan, the IPRE team reviewed responses to the questionnaire meeting attendees filled out as part of the CEDS Update Kickoff Meeting in July. Next, an IPRE team member presented an overview of the current SWOT content and gave attendees time to fill out a short questionnaire asking about updates to the SWOT. The meeting then split into three smaller breakout rooms to discuss the SWOT before coming back as a full group to share insights from small group discussions.

Next, an IPRE team member reviewed the current Action Plan, focusing on the goals and action item forms that were designed to provide details about how to implement each action. The IPRE team member also shared three examples of other CEDS action plans: [Eastern Upper Peninsula, Michigan](#); [Mid-Region, New Mexico](#); and [Southeast Alaska](#). Each CEDS illustrated a different approach to formatting the action plan. Attendees were encouraged to think about what aspects of these CEDS action plans they liked and disliked to help inform how the CWEDD CEDS Action Plan might be reformatted for the 2020 update. After the IPRE presentation, attendees again took time to fill out a short questionnaire about the current CWEDD Action Plan and split into three smaller groups to discuss updates to the Action Plan. After discussing the Action Plan in small groups, attendees came back together to share some insights from their discussion.

KEY TAKEAWAYS

The following sections of this memo summarize the discussion around the SWOT Analysis and Action Plan from both small group breakouts and full group sharing. Note that IPRE will summarize and share

responses to the two questionnaires prior to the September CEDS Update Meeting, but those responses are not included here since both questionnaires remain open to gather feedback through September 4th.

SWOT Analysis

Meeting attendees considered the relevance of the current SWOT Analysis and provided feedback about what changes should be included in the 2020 CEDS update. In small groups, meeting attendees discussed the following prompts:

- What stood out to you while completing the questionnaire?
- What changes in (strengths, weaknesses, opportunities, and threats) have occurred regionally?
- It can be useful to think backwards: we know some of the actions that need to happen regionally, so how do those tie back to regional (strengths, weaknesses, opportunities, threats)?
- In what ways has COVID-19 highlighted changes in the SWOT for the region?
- Feedback from July meeting questionnaire suggests the continued need to incorporate resilience, equity, and collaboration within the CEDS. What changes to the SWOT analysis might reflect these?

Overall, meeting attendees affirmed that much the previous SWOT held true, but observed potential modifications that should be included in the update. Below, we highlight observations about modifications grouped by existing SWOT categories.

Marketable Strengths

- **Missing Industries** – Several meeting attendees pointed out industries that are important strengths in our region, but that do not appear to be clearly highlighted in the CEDS, including:
 - Food and beverage manufacturing
 - Wood products
 - Metals manufacturing (particularly for aerospace and other specialty metals manufacturing)
- **Missing Reference to Livability** – Meeting attendees also pointed out that one of our region's greatest strengths is livability and access to nature and outdoor recreation. This strength is not currently highlighted in the CEDS.

Regional Weaknesses

Connectivity/Infrastructure

- **Broadband** – Meeting attendees pointed out that the pandemic has underscored the importance of ensuring access to high-speed internet. Particularly in rural areas, the lack of broadband has made remote work and education extremely difficult. To ensure equity of access and opportunity, broadband development should be a priority of the 2020 CEDS. Lack of internet access has contributed to increasing disparities in prosperity in our region and beyond.
- **Infrastructure Readiness/Quality Last Mile** – At first glance, our region appears have great infrastructure resources. When it comes down to attracting businesses to locate or expand in our region, however, we have issues with the level of infrastructure development at many sites.

Businesses often back away when they learn the extent of upgrades/expansion required to bring a site into full operation.

- **East-West Connectivity** – Coastal communities have tremendous potential to grow an ocean-based economy, but lack of connectivity to the major markets and transportation systems in the valley continue to act as a barrier to economic expansion.
- **Aging Infrastructure** – The region continues to struggle with accessing funding to upgrade aging infrastructure.

Demographics

- **Lack of Skilled Labor Force** – While the region has good training centers and other training resources, it can sometimes be challenging to connect people with these resources. This means that the assets the region has to offer are underutilized.

Institutional Barriers

- **Lack of Regional Brand** – Despite a focus on creating a regional brand in the 2015 CEDS action plan, meeting attendees felt that the region still lacks coherent branding. One meeting attendee suggested that Travel Lane County might offer a good example of how to coherently brand a diverse region; the agency’s “Eugene, Cascades, and Coast” branding effectively demonstrates both diversity and cohesion within a region.

District-Wide Opportunities (Soon-to-be Strengths)

- **Millersburg Intermodal Center Development** – The conversion of a large mill site into an intermodal facility for freight transfer will become a major strength for our region once completed. The facility will help divert truck traffic from I-5 by offering an “inland port” where trucks can transfer their cargo to trains.

Potential Threats

Coordination

- **Unaligned Service Boundaries** – The CWEDD region (Benton, Lane, Lincoln, and Linn counties) overlaps with some service territories, but not all. For example, although workforce is a critical part of the economic development ecosystem, the District is served by three different Workforce Investment Boards. When many economic development service providers have different service territories, it can be difficult to execute a coordinated regional economic development strategy.

Taxes/Funding

- **Lack of Stable Tax Funding** – Since many economic development projects, particularly infrastructure-related ones, are costly, lack of funding stability threatens project planning and execution. Particularly as the economic recession caused by the pandemic begins to hit state and local budgets, it may become increasingly difficult to fund projects.
- **Lack of Capital for Early-Stage Companies** – Entrepreneurs in our region need access to capital that *does not* come in the form of loans that will have to be repaid. It will continue to be difficult for entrepreneurs in our region to thrive if they struggle to access manageable financing.

Miscellaneous

- **Lack of Affordable Housing Stock** – Housing is an increasingly pressing issue in our region. With limited access to affordable housing, it will be difficult to market the region as a place to live, work, and play. While each community faces its own unique housing challenges, housing on the coast is a particularly challenging issue due to vacation properties. Meeting attendees also pointed out that the *location* (not just the price) of housing can pose a threat as well. If affordable housing exists far away from employment opportunities, the overall costs for a household may still be burdensome due to commuting-related expenses. Meeting attendees acknowledged that housing solutions need to come from adjustments to both local and State policies. There may be a need at the State level to adjust policies so that localities have more/different land use tools at their disposal to promote affordable housing and affordable budgets.
- **K-12 Education** – Meeting attendees pointed out that K-12 education in our region, particularly in rural areas, needs a boost. This is an incredibly complex issue, but one meeting attendee pointed out that if we become better able to demonstrate to K-12 students that economic opportunity exists in their own hometown and region, we can start to combat the effects the brain drain and youth disaffection.
- **Lack of Representation of People of Color in Economic Development** – Several meeting attendees pointed out that the voices and needs of People of Color (POCs) have been left out of the economic development conversation in our region and beyond. Continuing to exclude these perspectives threatens equitable economic growth in our region. During this round of the CEDS update and moving forward with economic development work, economic developers should broaden representation of POCs in input and decision-making.

COVID Implications

Many meeting attendees commented on the changing landscape caused by the pandemic. While nobody knows what kinds of lasting behavior changes might result from the pandemic, two main (related) themes came out of attendees' discussion:

- **Employment Assumptions** – We may need to change our assumptions about how and where people want to work. With so many office-based workers realizing remote work may be an option, where people chose to locate for jobs may change in the coming years.
- **Housing Assumptions** – If employment patterns change, housing needs/desires are also likely to change. People may be more excited to live in smaller, amenity-rich communities if they are able to work remotely. People may also have different housing type demands if they now require a home office.

While it is probably too early to understand exactly how, changing employment and housing patterns are likely to lead to changes in our region's population and demographic make-up.

Action Plan

After reviewing the current CEDS Action Plan and looking at the three example CEDS action plans from the [Eastern Upper Peninsula, Michigan](#); the [Mid-Region, New Mexico](#); and [Southeast Alaska](#), meeting attendees reflected together on formatting and scale/scope changes that the CEDS update should consider. In small groups, meeting attendees discussed the following prompts:

Format of the Action Plan

- What has not worked with the existing format and why?
- What formatting changes would help improve the action plan?

Scale/Scope of the Action Plan

- Was the scale/scope of the 2015 action plan appropriate? Why or why not?
- Who should implement the CEDS?
- How much time should they spend on the CEDS?

During discussion, attendees stressed the importance of also considering how the CEDS is used in the region. Below, we summarize meeting attendees' comments during small and full group discussion.

Use of the CEDS

- **Who uses the CEDS?**
 - Primarily economic development practitioners, particularly in the public sector
 - Secondarily mayors, council presidents, and other elected officials who are more deeply involved with economic development
 - Elected officials may be aware of the CEDS, but likely do not consider it on a regular basis
 - Elected officials likely won't know about the CEDS unless staff specifically address it with them
- **How is the CEDS used?**
 - During funding applications (to demonstrate regional priorities)
 - During funding conversations with federal elected representatives
 - While the CEDS may not be used regularly, it is a critical document for big federal funding opportunities; a proposed project must be tied back to a CEDS priority to be considered

Format of the Action Plan

- **CEDS document is overwhelming** – For those who don't regularly interact with the CEDS (and even for some who interact with it more regularly), the CEDS does not feel approachable. While the 100+ pages of supporting materials may be necessary to keep, it would be useful to produce a more streamlined executive summary that could be used and referenced by more people on a regular basis.
- **Lack of accountability** – The current action plan tables in Volume I of the CEDS do not specifically assign actions to people or organizations and do not include metrics for determining success. While these elements are included in the Action Item Forms in Appendix A, meeting attendees found the action item forms confusing and therefore not a readily accessible tool for interpreting and executing the CEDS. Meeting attendees also pointed out that the measurements suggested in the action item forms are only "potential." Creating more clear and concrete metrics for the 2020 update would help with accountability.
- **Reformat the action plan as a Gantt chart with more implementation details** – To address the previous two issues, meeting attendees suggested an adaptation of the Southeast Alaska CEDS action plan concept. Attendees appreciated the type of details included in the Alaska plan and suggested that an improvement to readability would come from listing those same details in a Gantt chart style timeline. Such a chart would clearly illustrate what, who, and when, and associate metrics with each goal.
- **Formatting may be less important than increasing understanding of how to use the CEDS** – Many of those involved in economic development in our region are unaware of the CEDS. A top priority should be better communicating about the Strategy's existence and how to leverage it.

Scale/Scope of the Action Plan

- **Mixed feelings about the scale/scope of the CEDS** – Some meeting attendees felt the scale/scope was about right, but others felt it was overly ambitious (in part because very few actions for the 2015 have been implemented).
- **All economic development participants in the region should be responsible for implementation** – Some meeting attendees identified the COGs as facilitators, working to align economic development entities around the region behind implementation of the CEDS action plan. This could lead to the pursuit of more regional-scale opportunities than has previously occurred in our District.
- **The CEDS should take a broad view of economic development** – The CEDS is an opportunity to address all factors that contribute to our economic prosperity. That means taking a broader focus beyond business support and development. The CEDS should support coverage of basic needs and quality of life enhancements that together with business support result in a more prosperous region for all.
- **The CEDS should not supersede local priorities** – Local elected officials create priorities based on the desires of their constituents. These priorities can shift over time. The CEDS should be flexible enough that it can both set regional direction and allow for the elevation of local priorities (and changes in those priorities over time). Ideally, the overarching goals described in the CEDS could be used to align local priorities into larger regional projects. Regional projects often have greater impacts than disconnected local projects can achieve on their own.

NEXT STEPS

The IPRE team will use the input from this meeting, from the two questionnaires, and from CWEDD staff to begin drafting updates to the SWOT Analysis and Action Plan. The next meeting on **Thursday, September 17, 2020 from 9-11am** will primarily address updates to the Action Plan and the CEDS implementation structure.

LIST OF MEETING ATTENDEES

For a full roster of meeting attendees with affiliations and contact information, visit <http://www.ocwcog.org/economic-development/cascades-west-economic-development-district/ceds/>

Attendees

Alysia Rodgers	Dean Craig	Mary Walston
Austin Ramirez	Derrick Tokos	Pat Malone
Biff Traber	Ed Dreistadt	Paul Shuytema
Caroline Cummings	Jodi Mescher	Rachel Maddock-Hughes
Chris Workman	Greg Irvin	Robert Killen
Cindy Perry	Heather Buch	Sarah Means
Corey Wright	Jerry Sorte	Sean McGuire
Courtney Flathers	Jim Lepin	Sharon Konopa
Courtney Griesel	John Pascone	
Dave Price	Judy Richter	

CWEDD Staff

Emma Chavez
Justin Peterson
Mike Corwin
Ryan Vogt

IPRE Staff

Aniko Drlik-Muehleck
Aqsa Khan
Josh Bruce
Melissa Graciosa

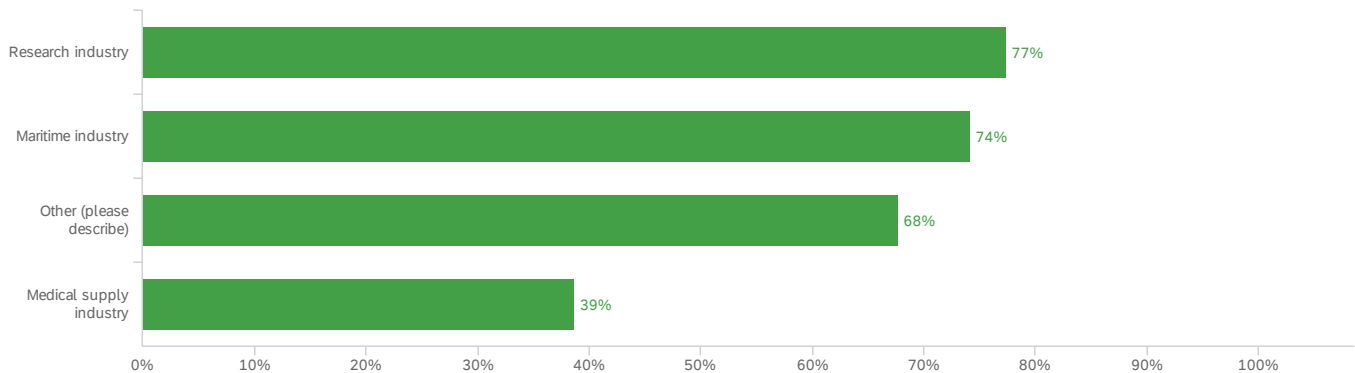
Default Report

CWEDD CEDS 2020 August Meeting_SWOT
September 10, 2020 10:20 AM PDT

38 Total Responses;

Number of responses varies by question (see
"Count" for number of responses for each question)

Q1 - The following growth in these industry clusters are a marketable strength in the
CWEDD region. Mark all that still describe marketable strengths.



#	Field	Choice Count
1	Medical supply industry	15% 12
2	Maritime industry	29% 23
3	Research industry	30% 24
5	Other (please describe)	26% 21
		80

Showing rows 1 - 5 of 5

Field	Count
The following growth in these industry clusters are a marketable strength in the CWEDD region. Mark all that still describe marketable strengths. - Selected Choice	31

Showing rows 1 - 1 of 1

Other (please describe)

Food and Beverage

food industry

Specialty metals and manufacturing

Technology, remote work, traditional manufacturing

Tourism/Hospitality

Tourism, Alcohol-related industries (beer, wine, distilleries, ciders, etc.), Hi-tech

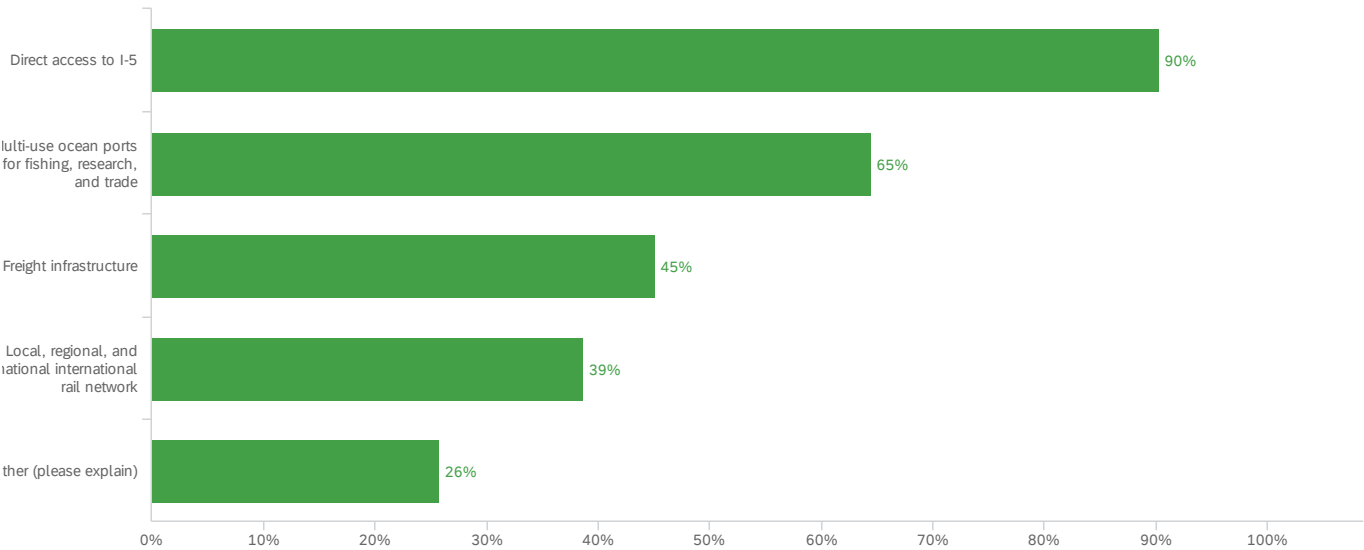
technology

value added local foods - e.e. wine, bar, spirits

Food processing and organic food production

Food manufacturing

Q2 - The following aspects of connectivity are a marketable strength in the CWEDD region. Mark all that still describe marketable strengths.

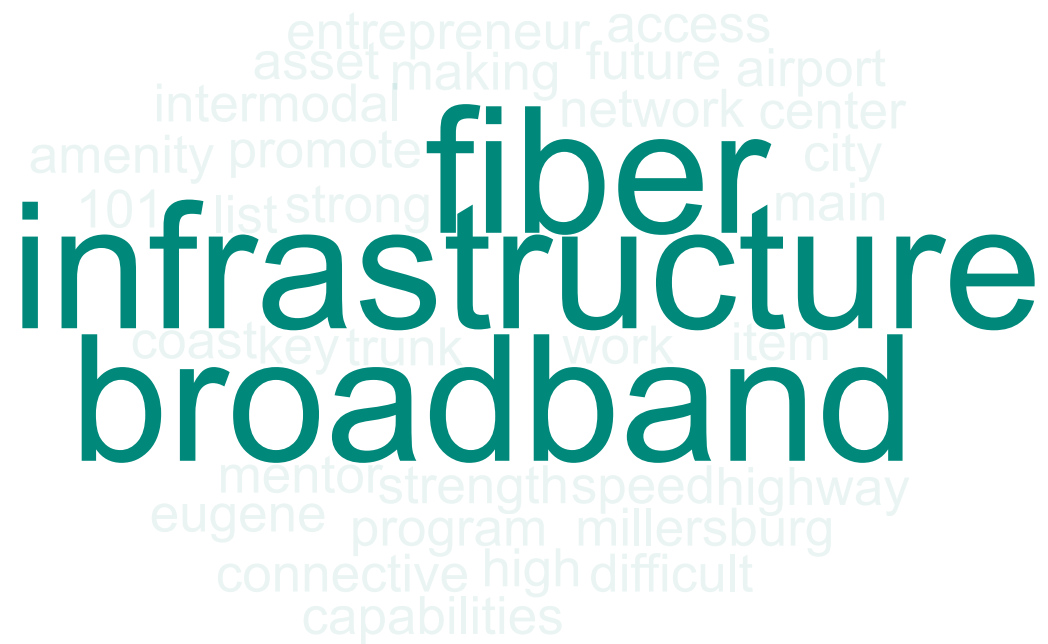


#	Field	Choice Count
1	Direct access to I-5	34% 28
2	Multi-use ocean ports for fishing, research, and trade	24% 20
3	Local, regional, and national international rail network	15% 12
5	Freight infrastructure	17% 14
6	Other (please explain)	10% 8
		82

Showing rows 1 - 6 of 6

Field	Count
The following aspects of connectivity are a marketable strength in the CWEDD region. Mark all that still describe marketable strengths. - Selected Choice	31

Showing rows 1 - 1 of 1



Other (please explain)

Intermodal Center in Millersburg

The other items are listed assets for which the infrastructure is not strong, making them difficult amenities to promote as strengths

Fiber Infrastructure.

Fiber access. The coast's main fiber trunk goes along Highway 101

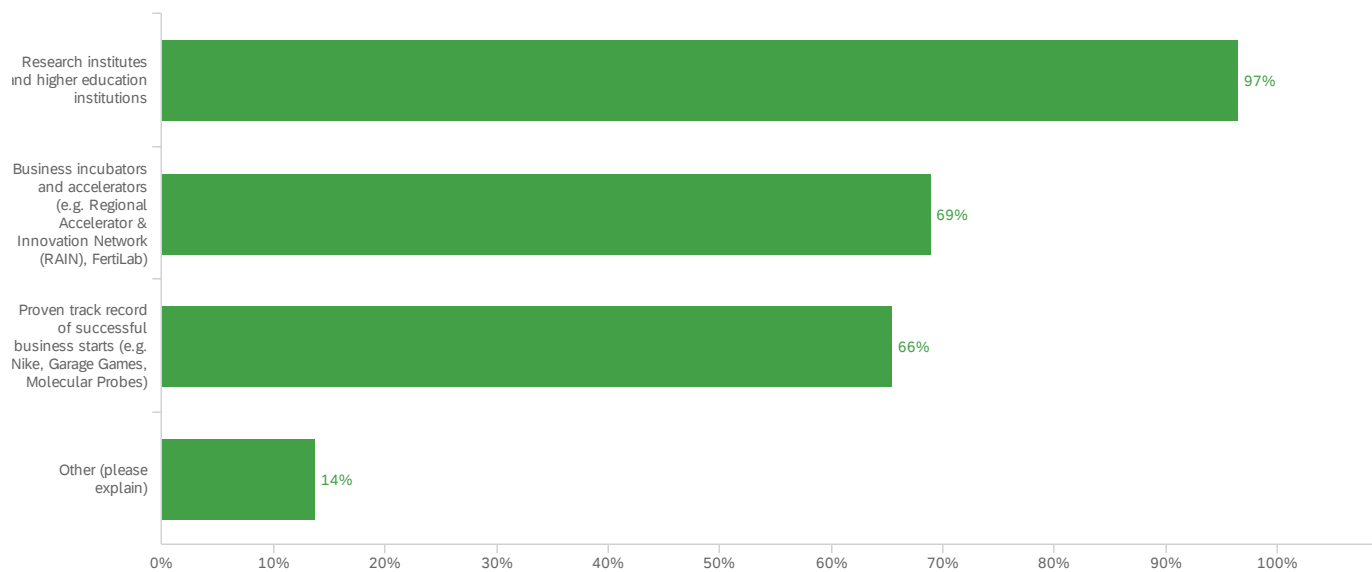
Mentor network connectivity via various Entrepreneurial Programs

Eugene Airport;

High speed broadband in key cities

Future work on broadband capabilities

Q3 - The following support a culture of innovation as a marketable strength in the CWEDD region. Mark all that still describe marketable strengths.



#	Field	Choice Count
4	Business incubators and accelerators (e.g. Regional Accelerator & Innovation Network (RAIN), FertiLab)	28% 20
5	Research institutes and higher education institutions	39% 28
6	Proven track record of successful business starts (e.g. Nike, Garage Games, Molecular Probes)	27% 19
7	Other (please explain)	6% 4
		71

Showing rows 1 - 5 of 5

Field	Count
The following support a culture of innovation as a marketable strength in the CWEDD region. Mark all that still describe marketable strengths. - Selected Choice	29

Showing rows 1 - 1 of 1

Q3_7_TEXT - Other (please explain)

Other (please explain)

Small business

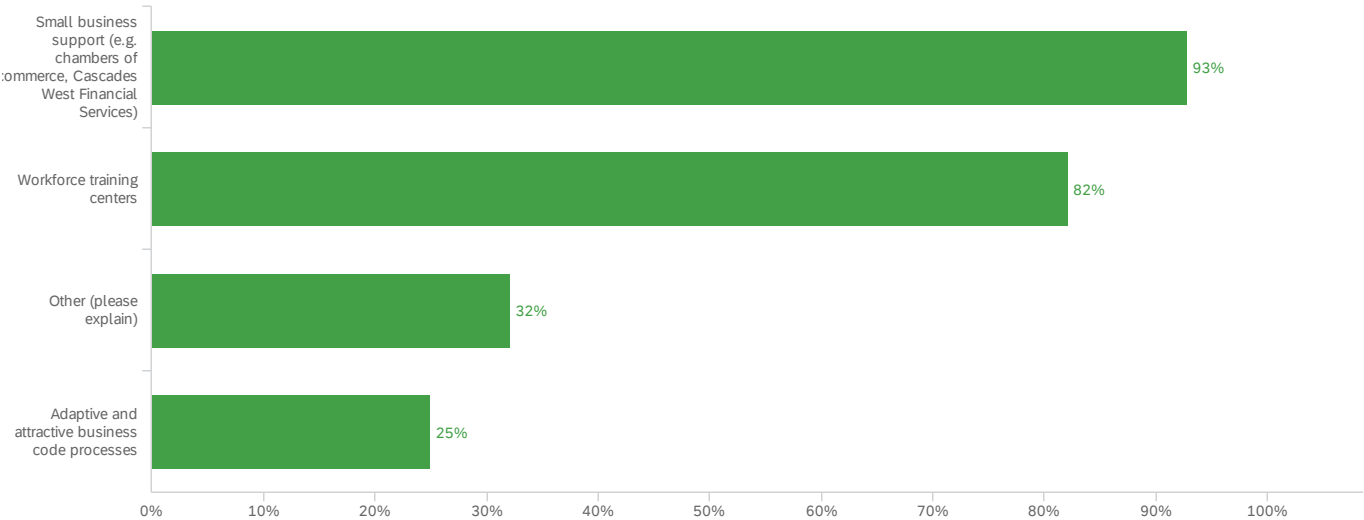
Other (please explain)

(From a Lincoln City perspective) True high-speed connectivity to allow living on the coast with the ability to move work files.

Growth of "innovation districts" e.g. in Eugene

update incubators and accelerators and add other start up resources

Q4 - The following promote a supportive business climate as a marketable strength in the CWEDD region. Mark all that still describe marketable strengths.



#	Field	Choice	Count
2	Small business support (e.g. chambers of commerce, Cascades West Financial Services)	40%	26
3	Workforce training centers	35%	23
4	Other (please explain)	14%	9
1	Adaptive and attractive business code processes	11%	7
			65

Showing rows 1 - 5 of 5

Field	Count
The following promote a supportive business climate as a marketable strength in the CWEDD region. Mark all that still describe marketable strengths. - Selected Choice	28

Showing rows 1 - 1 of 1



Other (please explain)

Engaged business and industry leadership

Affordable workforce housing

Heurto de la Familia (supportive of the Latinx biz community)

Pro-business education in primary and high school

Second "paycheck" opportunities in Oregon

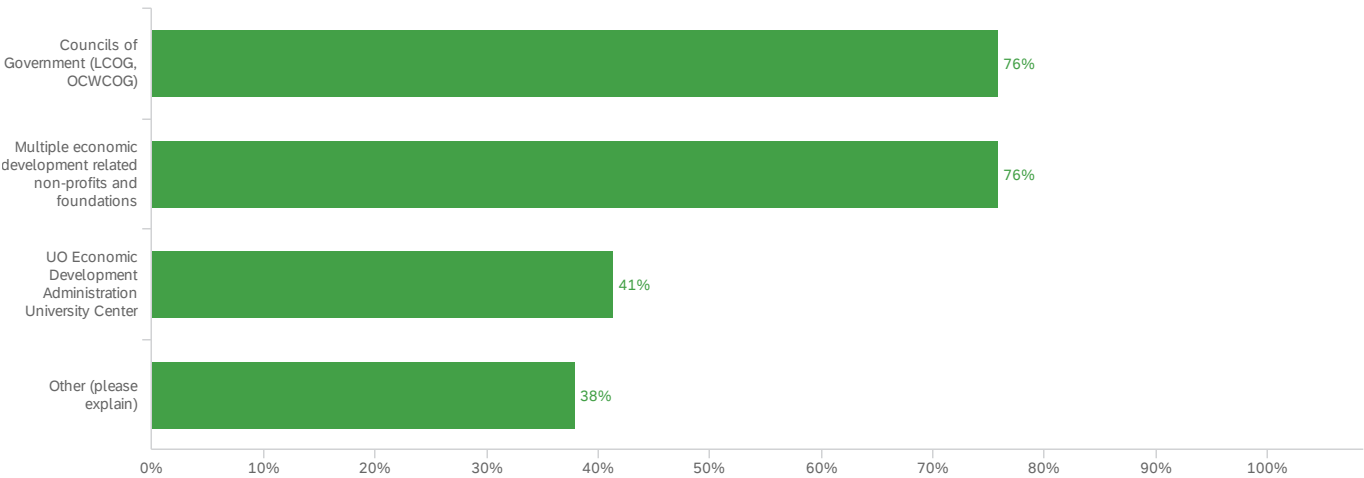
access to higher ed institutions/research facilities

Small Business Development Centers at all Community Colleges in the region.

Business incentives possible

SBDC centers

Q11 - The following provide technical support as a marketable strength in the CWEDD region. Mark all that still describe marketable strengths.



#	Field	Choice Count
1	Councils of Government (LCOG, OCWCOG)	33% 22
3	Multiple economic development related non-profits and foundations	33% 22
2	UO Economic Development Administration University Center	18% 12
4	Other (please explain)	16% 11

67

Showing rows 1 - 5 of 5

Field	Count
The following provide technical support as a marketable strength in the CWEDD region. Mark all that still describe marketable strengths. - Selected Choice	29

Showing rows 1 - 1 of 1



Q11_4_TEXT - Other (please explain)

Other (please explain)

Governor's Regional Solutions Team

Chambers of Commerce. Individual city economic development initiatives.

Local municipalities, workforce organizations

Small business centers for small towns, like the one at the local community college

City governments

LCC business center

Ec/Dev in local and regional governments, Business Oregon, USDA-RD

OSU Advantage Accelerator, SBDCs, ED offices of cities and counties

SBDCs, SCORE, municipalities

SBDCs

Other (please explain)

Small business development centers

Q12 - (Optional) What additional marketable strengths exist in the CWEDD region that are not listed above. Please describe.

(Optional) What additional marketable strengths exist in the CWEDD region t...

Mild climate conditions. Available housing for white collar workforce, while "affordable housing" is improving. Positive relationships between cities and counties and their citizens with law enforcement.

Quality of life amenities and recreation asset owners/promoters, cultural organizations and philanthropic organizations contributing to 'sense of place'

Several small rural communities have innovated to include housing and development incentives that are not politically achievable in Eugene. While they lack some of the amenities in the urban core, they have created better climates for businesses.

Speaking on the Central Coast, the same strengths that make us a great place to visit make us a great place to live. Providing people with the tools to work virtually from here is critical.

Quality of life, outdoors,

Good environment with strong support to take care of our environment

Arts, Timber/Lumber

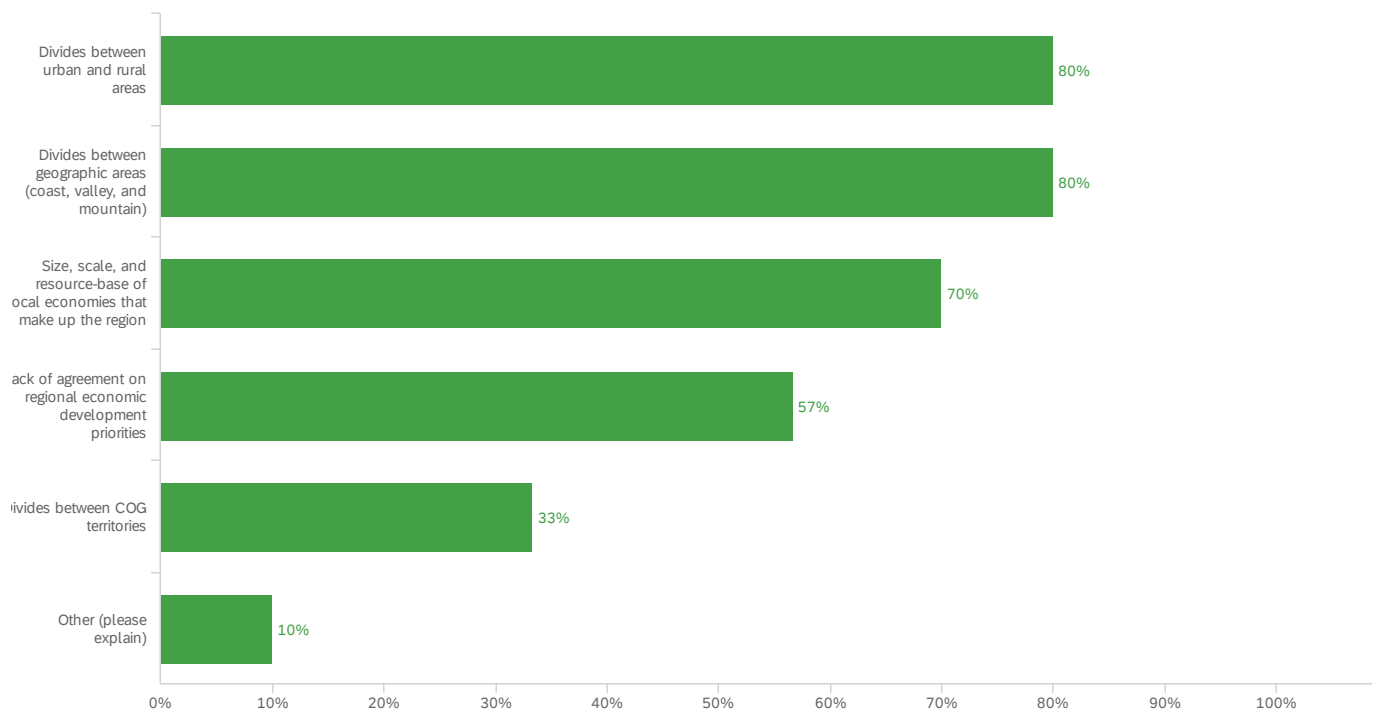
Liveability; Opportunities to live/engage with nature; Relatively decent availability of business locations at reasonable prices.

Oregon coast as a recession-proof tourism magnet

A word cloud shaped like the state of Oregon, featuring various terms related to community development and quality of life. The most prominent words, shown in a larger teal font, are 'climate', 'life', 'quality', 'place', 'amenity', 'housing', and 'business'. Other visible words in a smaller, lighter teal font include 'coast', 'development', 'citizen', 'core', 'innovate', 'arts', 'nature', 'central', 'county', 'decent', 'incentive', 'asset', 'liveable', 'collar', 'lumber', 'cultural', 'make', 'opportunity', 'better', 'include', 'mild', 'city location', 'available', 'magnet', 'create', 'law', 'improve', 'eugene', 'critical', 'afford', 'enforce', 'great', 'lack', 'engage', 'good', 'enviroment', 'achieve', 'community', 'contribute', 'environment', 'conditions', 'development', 'citizen', 'core', 'innovate', 'arts', 'nature', 'central', 'county', 'decent', 'incentive', 'asset', 'liveable', 'collar', 'lumber', 'cultural', 'make', 'opportunity', 'better', 'include', 'mild', 'city location', 'available', 'magnet', 'create', 'law', 'improve', 'eugene', 'critical', 'afford', 'enforce', 'great', 'lack', 'engage', 'good', 'enviroment', 'achieve', 'community', 'contribute', 'environment', 'conditions', 'development', 'citizen', 'core', 'innovate', 'arts', 'nature', 'central', 'county', 'decent', 'incentive', 'asset', 'liveable', 'collar', 'lumber', 'cultural', 'make', 'opportunity', 'better', 'include', 'mild', 'city location', 'available', 'magnet', 'create', 'law', 'improve', 'eugene', 'critical', 'afford', 'enforce', 'great', 'lack', 'engage', 'good', 'enviroment', 'achieve', 'community'.

Q6 - The following describe the challenges of coordinating a large and diverse region.

Mark all that still describe regional weaknesses.



#	Field	Choice Count
4	Size, scale, and resource-base of local economies that make up the region	21% 21
5	Lack of agreement on regional economic development priorities	17% 17
6	Divides between urban and rural areas	24% 24
7	Divides between geographic areas (coast, valley, and mountain)	24% 24
8	Divides between COG territories	10% 10
9	Other (please explain)	3% 3

99

Showing rows 1 - 7 of 7

Field	Count
The following describe the challenges of coordinating a large and diverse region. Mark all that still describe regional weaknesses. - Selected Choice	30

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Q6_9_TEXT - Other (please explain)

Other (please explain)

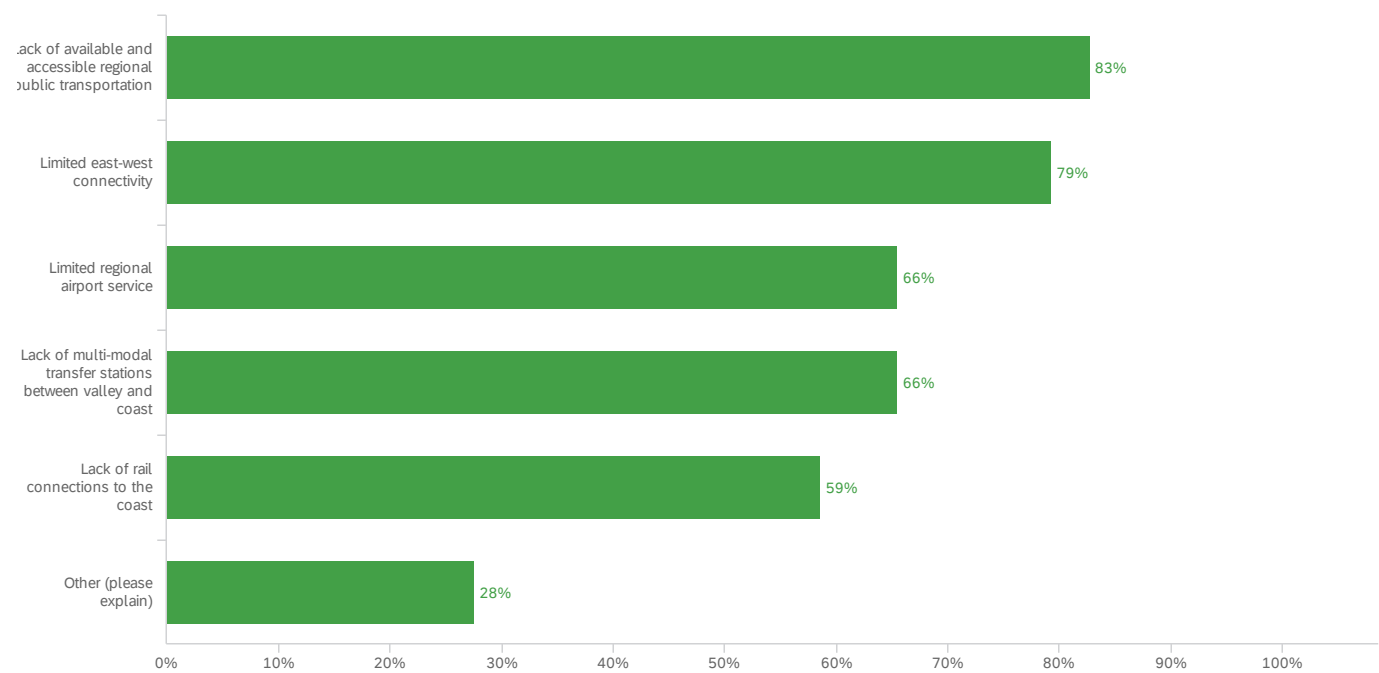
Lane County alone is the size of some US states, has 12 cities, and over 50 unincorporated communities. The "one-size fits all" approach does not work as evidenced by previous attempts.

Lack of trust and opportunities to "relationship build" across entities

An historic scarcity mindset among business support organizations (improving).

Q13 - The following aspects of connectivity are a regional weakness in the CWEDD

region. Mark all that still describe regional weaknesses.

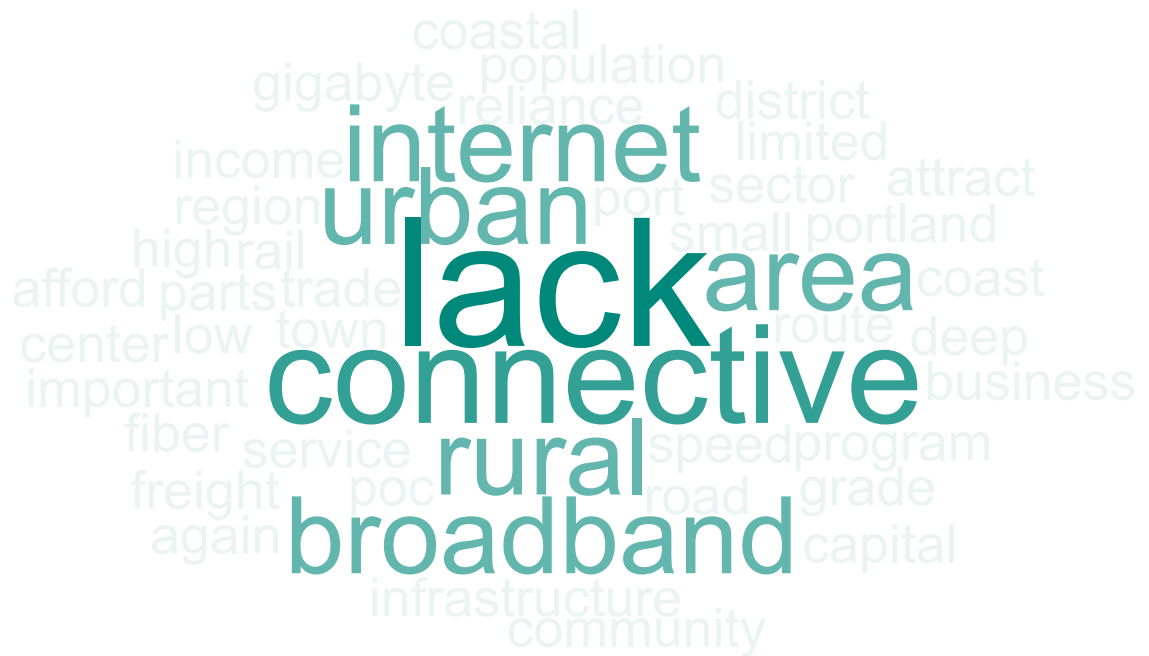


#	Field	Choice	Count
4	Lack of available and accessible regional public transportation	22%	24
1	Limited east-west connectivity	21%	23
3	Limited regional airport service	17%	19
5	Lack of multi-modal transfer stations between valley and coast	17%	19
2	Lack of rail connections to the coast	15%	17
6	Other (please explain)	7%	8
			110

Showing rows 1 - 7 of 7

Field	Count
The following aspects of connectivity are a regional weakness in the CWEDD region. Mark all that still describe regional weaknesses. - Selected Choice	29

Showing rows 1 - 1 of 1



Q13_6_TEXT - Other (please explain)

Other (please explain)

Lack of freight routes to the coast

Deep port infrastructure, reliance on Portland infrastructure for traded sectors

Some rural areas still lack the fiber connectivity they need due to lack of capital.

Again, gigabyte-grade internet service to attract business in small coastal towns may be more important than rail or road.

Lack of connectivity between POC and low income populations to urban centers or other programs.

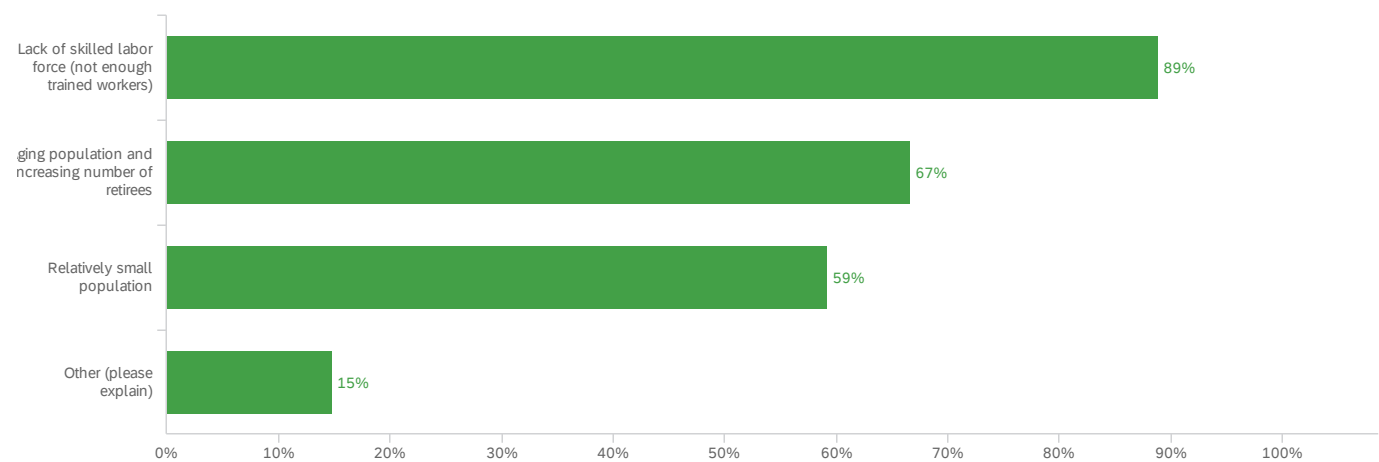
Lack of high-speed internet in many communities and districts.

Lack of or limited broadband in some parts of the region;

Broadband connectivity for rural and affordable in urban areas

Q14 - The following descriptions of demographics are a regional weakness in the

CWEDD region. Mark all that still describe regional weaknesses.



#	Field	Choice Count
3	Lack of skilled labor force (not enough trained workers)	39% 24
2	Aging population and increasing number of retirees	29% 18
1	Relatively small population	26% 16
4	Other (please explain)	6% 4

62

Showing rows 1 - 5 of 5

Field	Count
The following descriptions of demographics are a regional weakness in the CWEDD region. Mark all that still describe regional weaknesses. - Selected Choice	27

Showing rows 1 - 1 of 1

Q14_4_TEXT - Other (please explain)

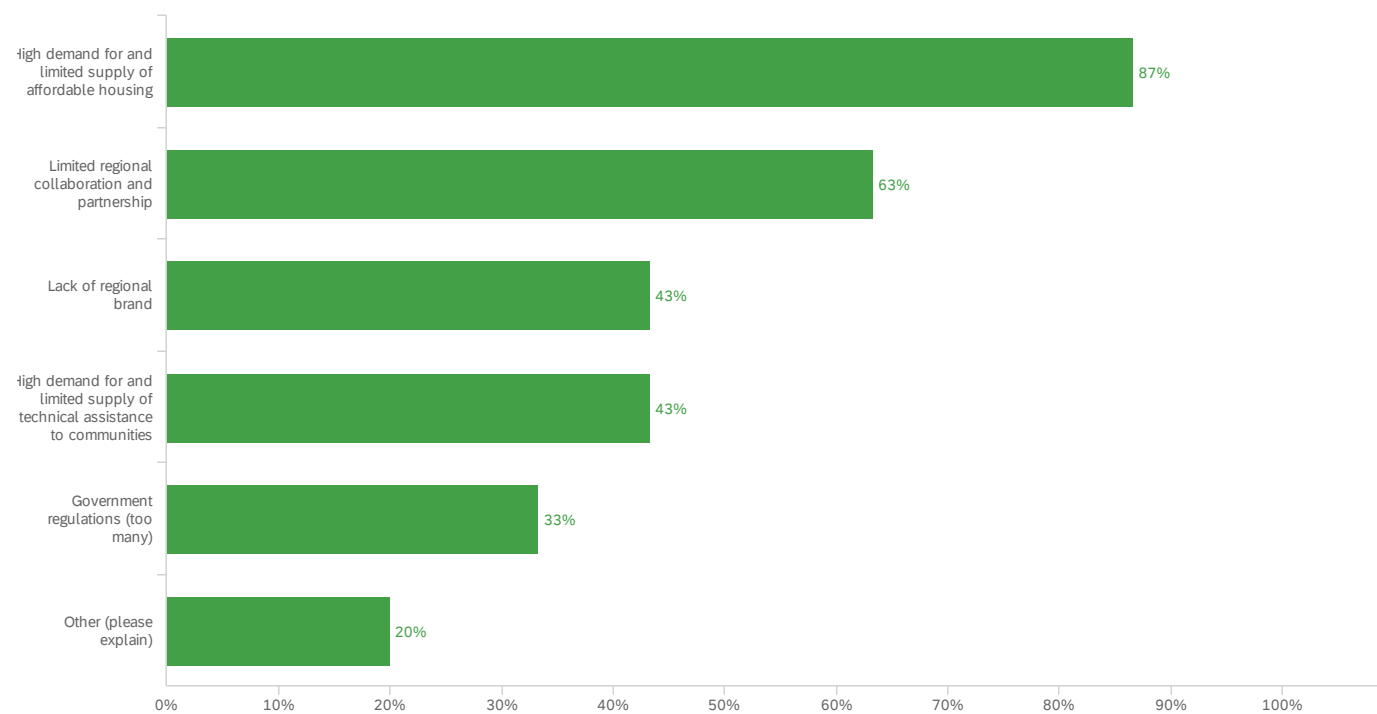
Other (please explain)
Lack of affordable housing making the central coast unattractive to workers.
Region is racially homogeneous
lack of diversity which inhibits attracting employees, losing employees to larger urban areas

Other (please explain)

Need additional and more diverse business involvement.

Q15 - The following are institutional barriers are a regional weakness in the CWEDD

region. Mark all that still describe regional weaknesses.



#	Field	Choice Count
2	High demand for and limited supply of affordable housing	30% 26
3	Limited regional collaboration and partnership	22% 19
1	Lack of regional brand	15% 13
4	High demand for and limited supply of technical assistance to communities	15% 13
5	Government regulations (too many)	11% 10
6	Other (please explain)	7% 6

87

Showing rows 1 - 7 of 7

Field	Count
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The following are institutional barriers are a regional weakness in the CWEDD region. Mark all that still describe regional weaknesses. -
Selected Choice

30

Showing rows 1 - 1 of 1



Q15_6_TEXT - Other (please explain)

Other (please explain)

Lack of affordable childcare options for workforce

State Land Use Goals and Misalignment to Reality of Development Needs

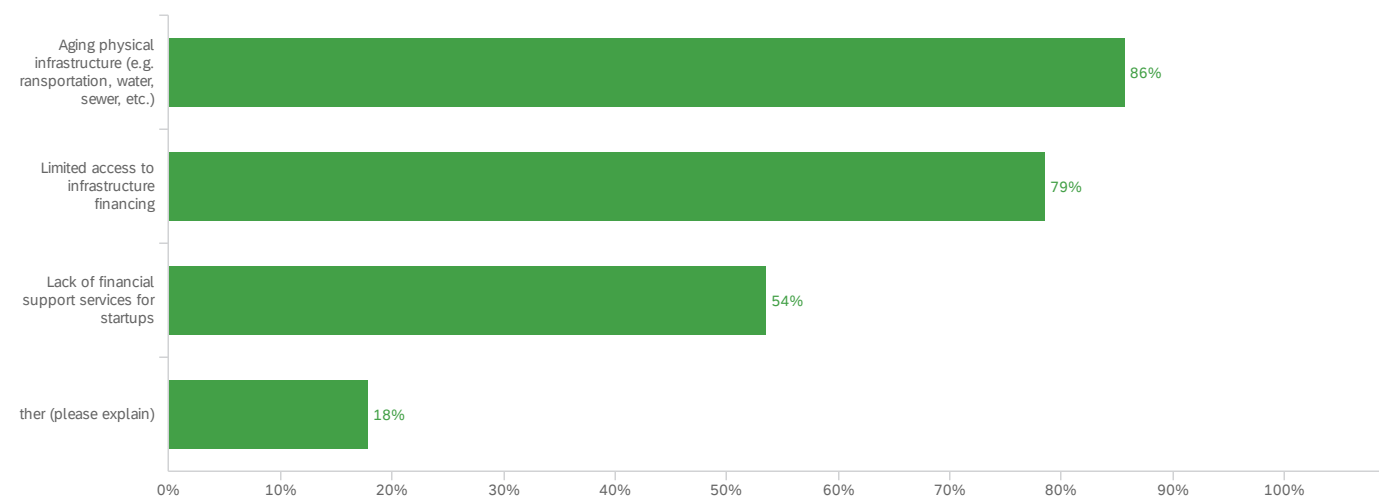
Cultural barriers

public education system that is a patch work of funding; inhibits recruitment of professionals, especially in the medical field

lack of a solid regional vision

Lack of RURAL broadband

Q16 - The following aspects of infrastructure describe regional weaknesses. Mark all that still describe regional weaknesses.



#	Field	Choice	Count
1	Aging physical infrastructure (e.g. transportation, water, sewer, etc.)	36%	24
3	Limited access to infrastructure financing	33%	22
2	Lack of financial support services for startups	23%	15
4	Other (please explain)	8%	5
		66	

Showing rows 1 - 5 of 5

Field	Count
The following aspects of infrastructure describe regional weaknesses. Mark all that still describe regional weaknesses. - Selected Choice	28
Showing rows 1 - 1 of 1	

Q16_4_TEXT - Other (please explain)

Other (please explain)
Lack of spaces for fostering community accessible innovation and entrepreneurship. Resources exist at universities but not for entire public.
inadequate state revenue and tax system that does not create revenue needed

Other (please explain)

Lack of high speed broadband throughout the region

Lack of good capital investment for startups

broadband access (connectivity and cost)

Q17 - (Optional) What additional regional weaknesses exist in the CWEDD region that are not listed above. Please describe.

(Optional) What additional regional weaknesses exist in the CWEDD region th...

Need for disaster planning and mitigation. Coastal economies risk devastation from potential earthquake/tsunami damage to water, wastewater & transportation infrastructure. For instance, a relatively small earthquake could topple Newport's earthen dams, which are this region's only water source.

Need for more seed stage investment capital for early stage companies, as well as grant funds for low income entrepreneurs and POC.

Economic development and support for entrepreneurship/innovation is a low priority for many elected state officials. Lots of talk but little action, about being inclusive, collaborative, and working on a common goal.

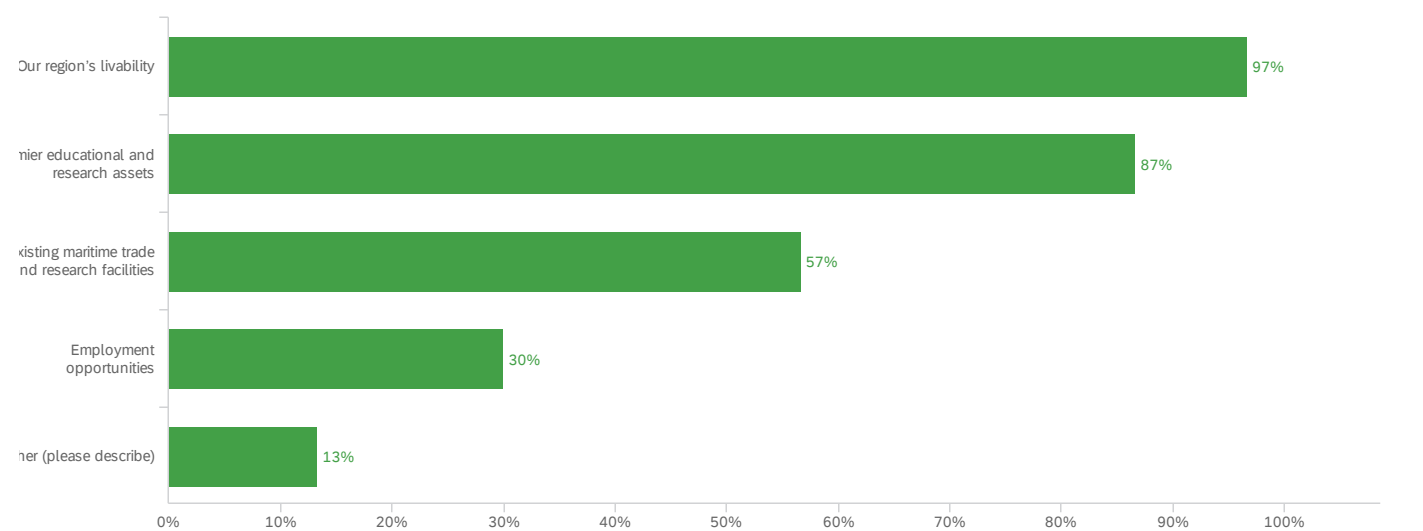
Lack of affordable, accessible childcare

"Region" definition changes depending on support organization. The WIB for Lincoln County, for example (NOW), covers a territory that extends all the way north along the coast and east to Columbia county. Not an overlap of the region represented on this call.

Governmental "boundaries". COG has "boundaries" different from Workforce Development, etc.



Q8 - The following describe the top district-wide opportunities. Mark all that still describe district-wide opportunities.



#	Field	Choice Count
1	Our region's livability	34% 29
4	Premier educational and research assets	31% 26
3	Existing maritime trade and research facilities	20% 17
2	Employment opportunities	11% 9
5	Other (please describe)	5% 4
		85

Showing rows 1 - 6 of 6

Field	Count
The following describe the top district-wide opportunities. Mark all that still describe district-wide opportunities. - Selected Choice	30

Showing rows 1 - 1 of 1

Other (please describe)

Livability, access to outdoors, regional buy-in for supporting overlooked/underserved entrepreneurs and innovators

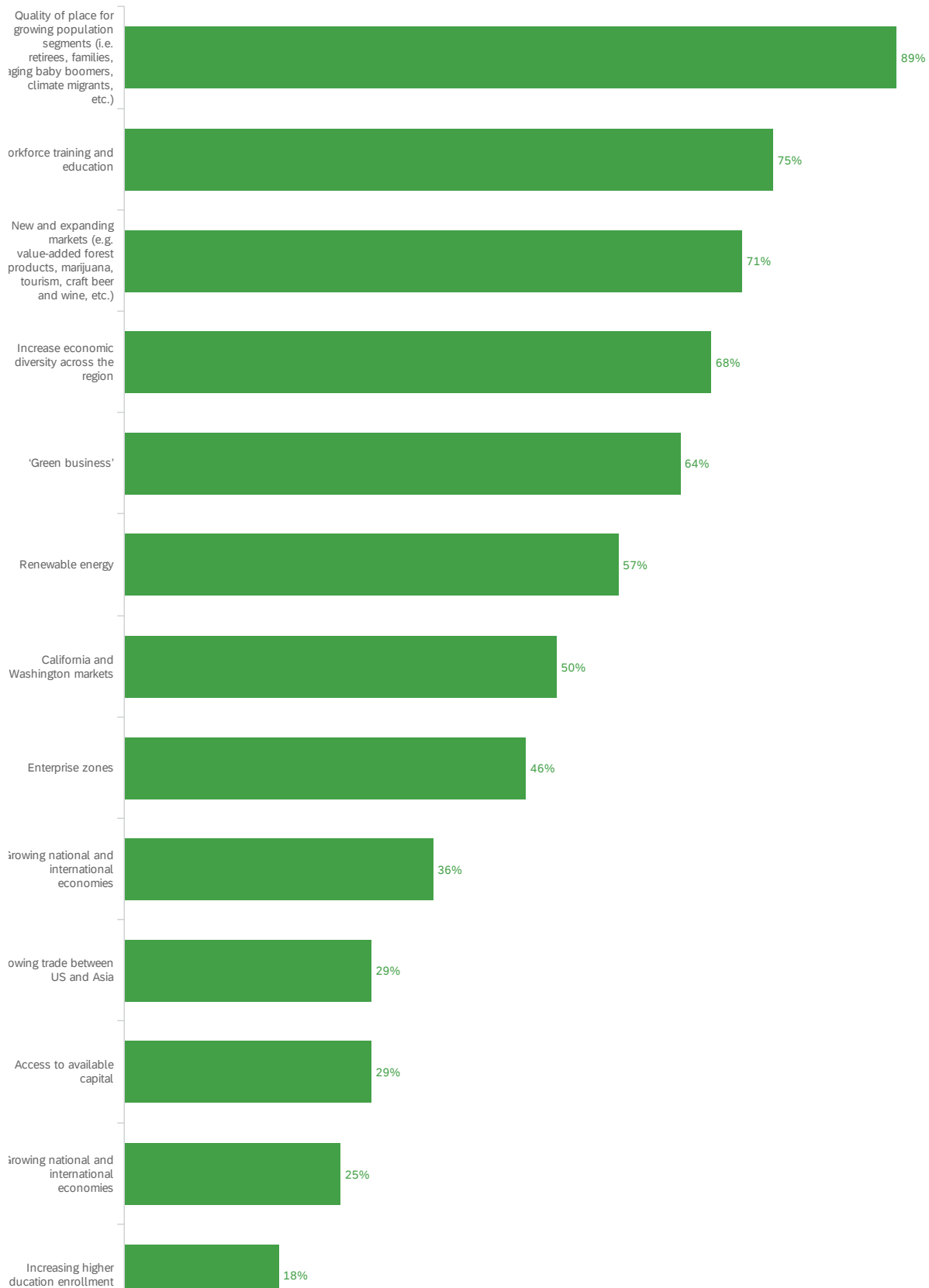
Industries listed in strengths

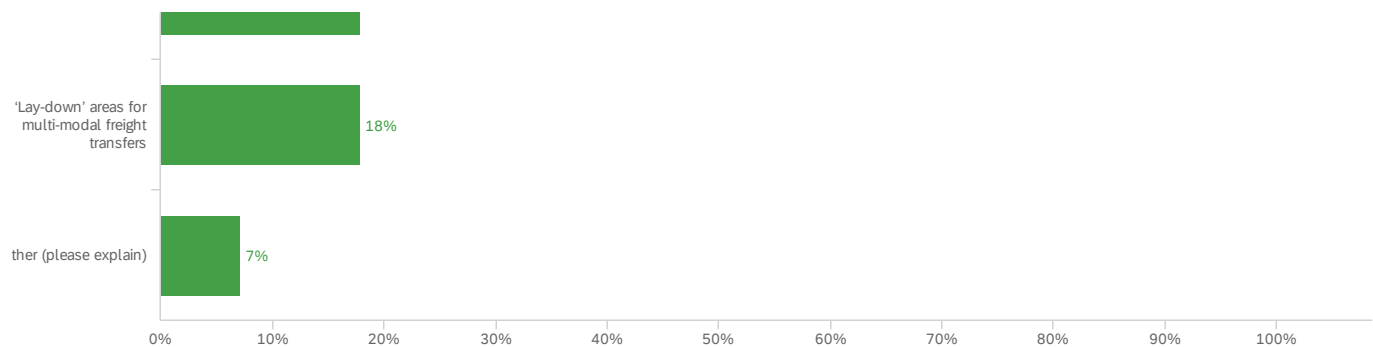
Other (please describe)

need to identify more trade and research facilities given we name maritime.

Fostering a collective brand for regional business support organizations.

Q18 - The following describe additional district-wide opportunities. Mark all that still describe district-wide opportunities.





#	Field	Choice Count
1	Quality of place for growing population segments (i.e. retirees, families, aging baby boomers, climate migrants, etc.)	13% 25
8	Workforce training and education	11% 21
7	Increase economic diversity across the region	10% 19
9	New and expanding markets (e.g. value-added forest products, marijuana, tourism, craft beer and wine, etc.)	10% 20
10	'Green business'	9% 18
11	Renewable energy	8% 16
3	Enterprise zones	7% 13
13	California and Washington markets	7% 14
6	Growing national and international economies	5% 10
2	Growing trade between US and Asia	4% 8
4	Access to available capital	4% 8
14	Growing national and international economies	4% 7
5	Increasing higher education enrollment	3% 5
12	'Lay-down' areas for multi-modal freight transfers	3% 5
15	Other (please explain)	1% 2
		191

Showing rows 1 - 16 of 16

Field	Count
The following describe additional district-wide opportunities. Mark all that still describe district-wide opportunities. - Selected Choice	28

Showing rows 1 - 1 of 1

Q18_15_TEXT - Other (please explain)

Other (please explain)

access to growing workforce populations

Small business development/entrepreneurship

Q19 - (Optional) What additional district-wide opportunities exist in the CWEDD region that are not listed above? Please describe.

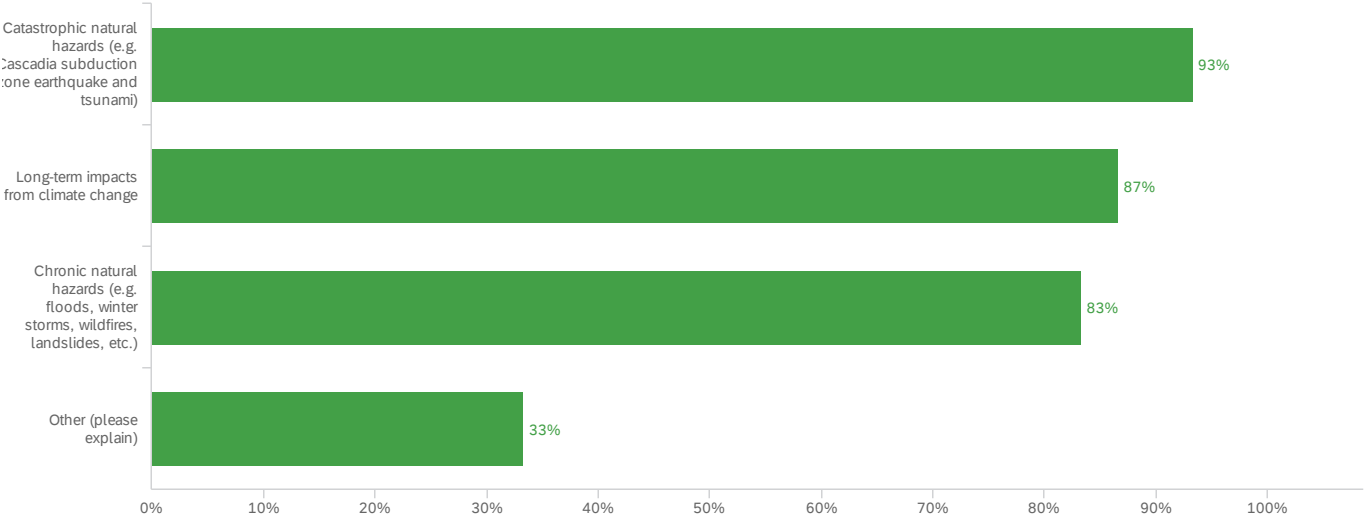
(Optional) What additional district-wide opportunities exist in the CWEDD r...

Multi-jurisdictional partnerships and relationships

Relatively cheap real estate market (compared to WA and CA) that will likely result in significant population growth as people leave big cities because of the pandemic. (Of course, this is a weakness as far as affordable housing for our own residents is concerned.)

Myriad Blue Economy segment opportunities.

Q21 - The following disaster events describe potential threats. Mark all that still describe potential threats.



#	Field	Choice	Count
2	Catastrophic natural hazards (e.g. Cascadia subduction zone earthquake and tsunami)	31%	28
3	Long-term impacts from climate change	29%	26
1	Chronic natural hazards (e.g. floods, winter storms, wildfires, landslides, etc.)	28%	25
4	Other (please explain)	11%	10
			89

Showing rows 1 - 5 of 5

Field	Count
The following disaster events describe potential threats. Mark all that still describe potential threats. - Selected Choice	30
Showing rows 1 - 1 of 1	



Q21_4_TEXT - Other (please explain)

Other (please explain)

Ongoing pandemic

Pandemic.

Risk to our food supply and availability of quality farm land. Potential damage to our water supplies.

um... Pandemics?

long term impact of pandemic and Oregon's ability to recover from the downturn

Global public health pandemic

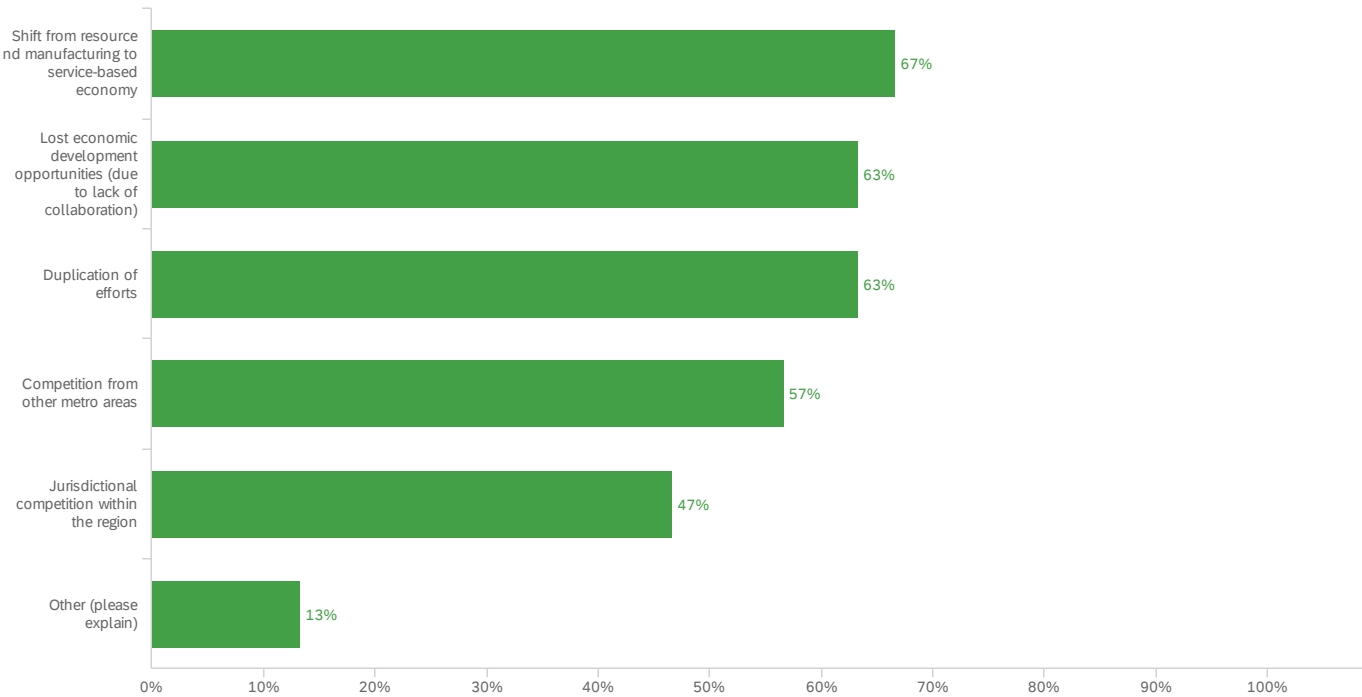
ongoing pandemic

Pandemics

Pandemics

pandemics (obviously)

Q22 - The following aspects of coordination describe potential threats. Mark all that still describe potential threats.



#	Field	Choice	Count
5	Shift from resource and manufacturing to service-based economy	22%	20
2	Lost economic development opportunities (due to lack of collaboration)	20%	19
3	Duplication of efforts	20%	19
4	Competition from other metro areas	18%	17
1	Jurisdictional competition within the region	15%	14
6	Other (please explain)	4%	4
			93

Showing rows 1 - 7 of 7

Field	Count
The following aspects of coordination describe potential threats. Mark all that still describe potential threats. - Selected Choice	30
Showing rows 1 - 1 of 1	

Q22_6_TEXT - Other (please explain)

Other (please explain)

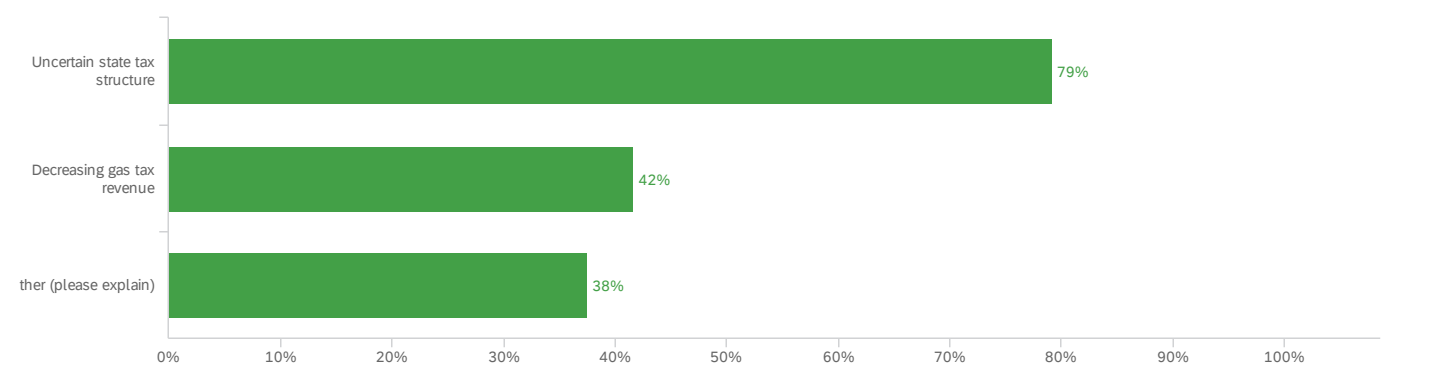
Over reliance on tech industry for economic stability. Unfriendly regulatory environment for manufacturing from the State.

Some groups attempting to be the main "leader" and vie for political power instead of working collaboratively towards a shared and common goal(s).

Competition for same pots of funding; egosystem instead of ecosystem

Lack of full broadband access

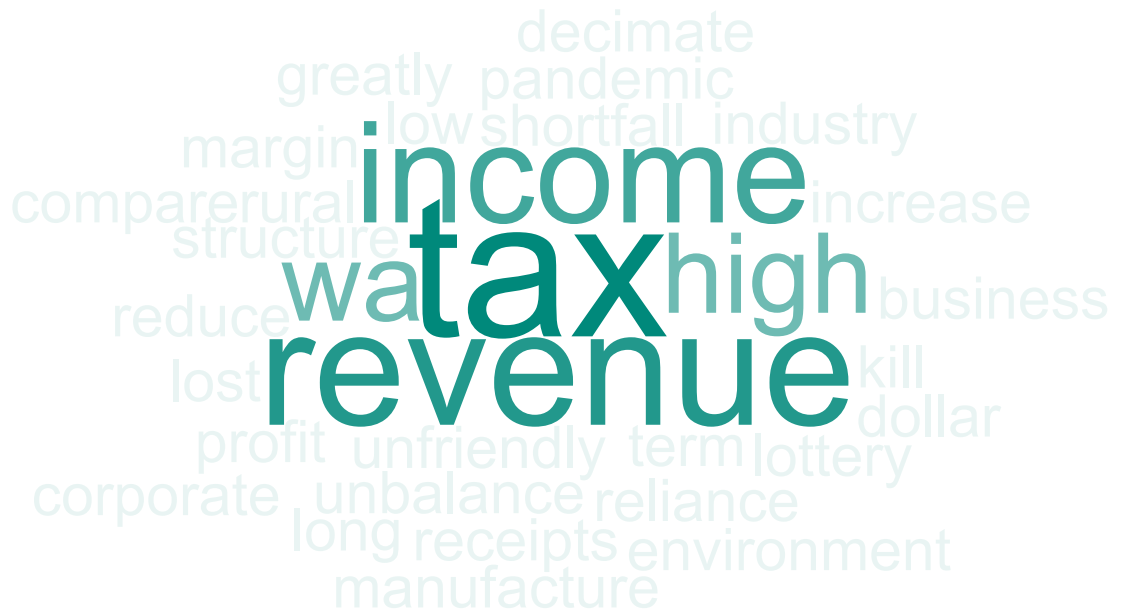
Q23 - The following aspects of taxes pose a potential threat. Mark all that still describe potential threats.



#	Field	Choice	Count
2	Uncertain state tax structure	50%	19
1	Decreasing gas tax revenue	26%	10
3	Other (please explain)	24%	9
			38

Showing rows 1 - 4 of 4

Field	Count
The following aspects of taxes pose a potential threat. Mark all that still describe potential threats. - Selected Choice	24
Showing rows 1 - 1 of 1	



Q23_3_TEXT - Other (please explain)

Other (please explain)

Increases in corporate income taxes.

Unfriendly industry tax environment

Greatly reduced revenues

to much reliance on the state income tax,with WA not having this tax.

Gross receipts tax will kill manufacturing businesses and rural businesses with low profit margins but high gross revenue.

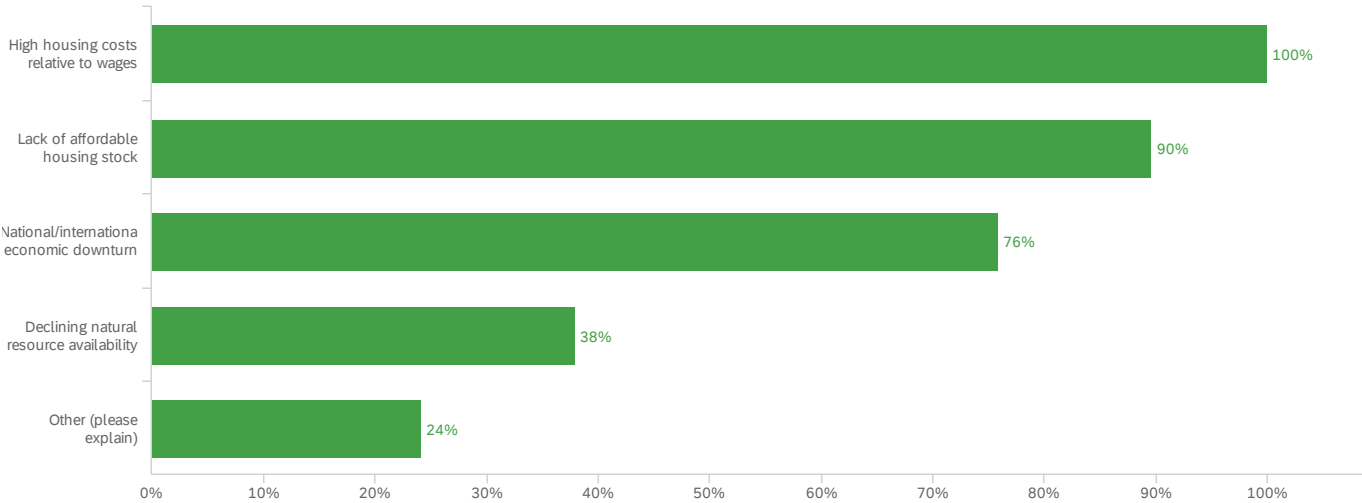
long term revenue shortfalls due to pandemic

Decimated state revenue, lost lottery dollars

unbalanced tax structure compared to CA & WA

high state income taxes

Q24 - The following describe general potential threats to the CWEDD region. Mark all that still describe potential threats.



#	Field	Choice	Count
3	High housing costs relative to wages	31%	29
1	Lack of affordable housing stock	27%	26
2	National/international economic downturn	23%	22
4	Declining natural resource availability	12%	11
5	Other (please explain)	7%	7
			95

Showing rows 1 - 6 of 6

Field	Count
The following describe general potential threats to the CWEDD region. Mark all that still describe potential threats. - Selected Choice	29

Showing rows 1 - 1 of 1



Q24_5_TEXT - Other (please explain)

Other (please explain)

Lack of workforce housing (on the coast)

regulations which negatively impact industry ability to be financially successful in Oregon/Region

Shift to service industry economy.

Lack of capital for starting and growing businesses in the region. Lack of workforce (both quality entry-level and C-suite level)

Unsafe living conditions in highly populated areas

Political divides

Wetland mitigation growing costs for developing industrial lands

Q25 - (Optional) What additional potential threats exist in the CWEDD region that are not listed above? Please describe.

(Optional) What additional potential threats exist in the CWEDD region that...

Impact of State government via liberal legislation and executive orders with continual negative impacts on businesses.

End of Report

Default Report

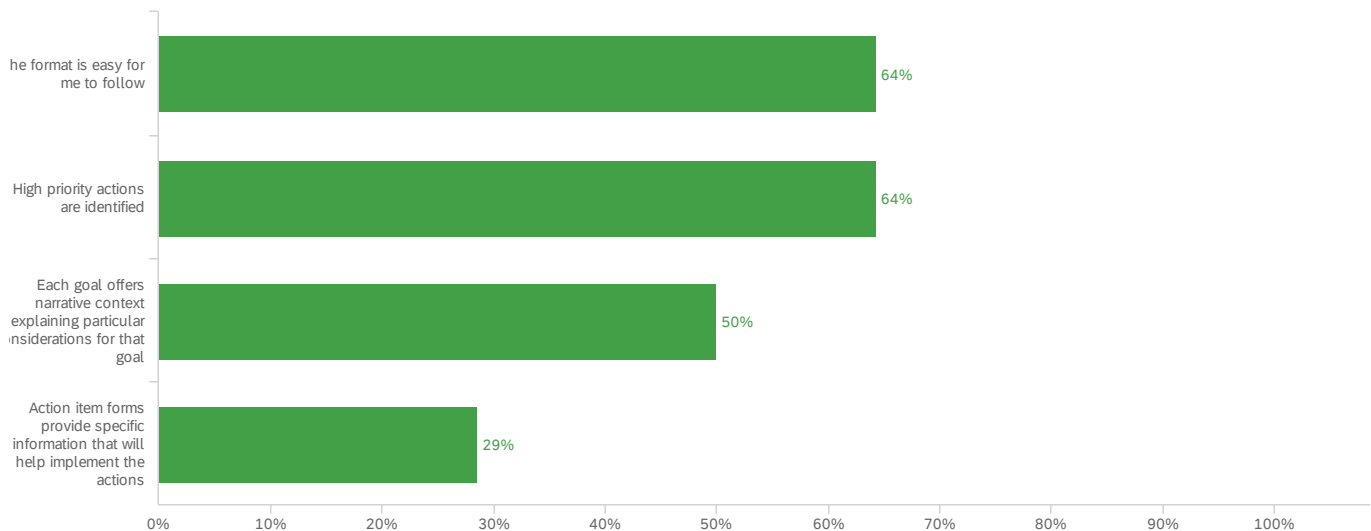
CWEDD CEDS 2020 - Actions Items

September 10, 2020 10:54 AM PDT

18 Total Responses;
Number of responses vary by question
(see "Count" for number of responses for
each question)

Q1 - What do you like about the current action plan and action item forms format (how the action plan and action item forms are designed and displayed, not their content)?

Select all that apply or leave blank if none apply.



#	Field	Choice Count
2	The format is easy for me to follow	31% 9
3	High priority actions are identified	31% 9
4	Each goal offers narrative context explaining particular considerations for that goal	24% 7
6	Action item forms provide specific information that will help implement the actions	14% 4
		29

Showing rows 1 - 5 of 5

Field	Count
What do you like about the current action plan and action item forms format (how the action plan and action item forms are designed and displayed, not their content)? Select all that apply or leave blank if none apply.	14

Showing rows 1 - 1 of 1

Q2 - (Optional) Please provide any additional feedback about what you like about the current format of the action plan in the 2015 CEDS.

(Optional) Please provide any additional feedback about what you like about...

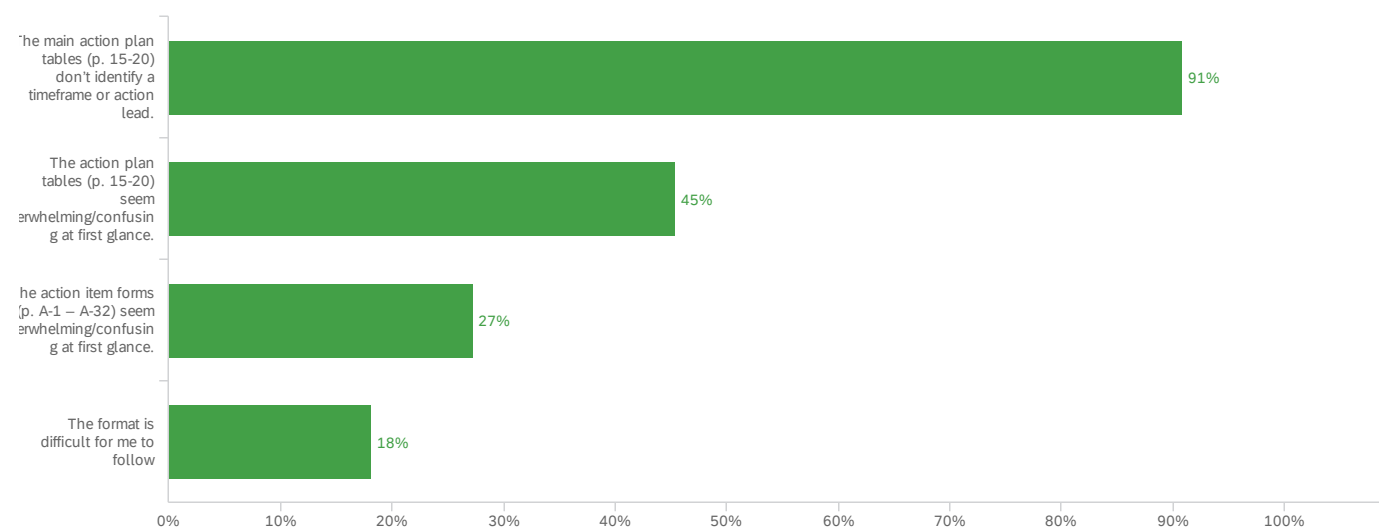
To be honest, following development of the CEDS in 2015 I've not used the document at all. Because it didn't relate directly to the day to day work, it wasn't a document I needed unless there was some tie to a grant opportunity. This is a clear indication to me that the document lacked action, accountability and feedback loop mechanisms for the practitioners doing the work in the region.

I didn't highlight any as I think we need more specificity in our initiative and then add the missing elements in who is responsible, timeline and metrics for success---all in a grid that will emphasize brevity and value engineering of direction

summary pages are helpful for quick reference when needed

Q3 - What do you dislike about the current action plan and action item forms format (how the action plan and action item forms are designed and displayed, not their content)?

Select all that apply or leave blank if none apply.



#	Field	Choice Count
5	The main action plan tables (p. 15-20) don't identify a timeframe or action lead.	50% 10
6	The action plan tables (p. 15-20) seem overwhelming/confusing at first glance.	25% 5
7	The action item forms (p. A-1 – A-32) seem overwhelming/confusing at first glance.	15% 3
4	The format is difficult for me to follow	10% 2
		20

Showing rows 1 - 5 of 5

Field	Count
What do you dislike about the current action plan and action item forms format (how the action plan and action item forms are designed and displayed, not their content)? Select all that apply or leave blank if none apply.	11

Showing rows 1 - 1 of 1

Q4 - (Optional) Please provide any additional feedback about what you dislike about the current format of the action plan in the 2015 CEDS.

(Optional) Please provide any additional feedback about what you dislike ab...

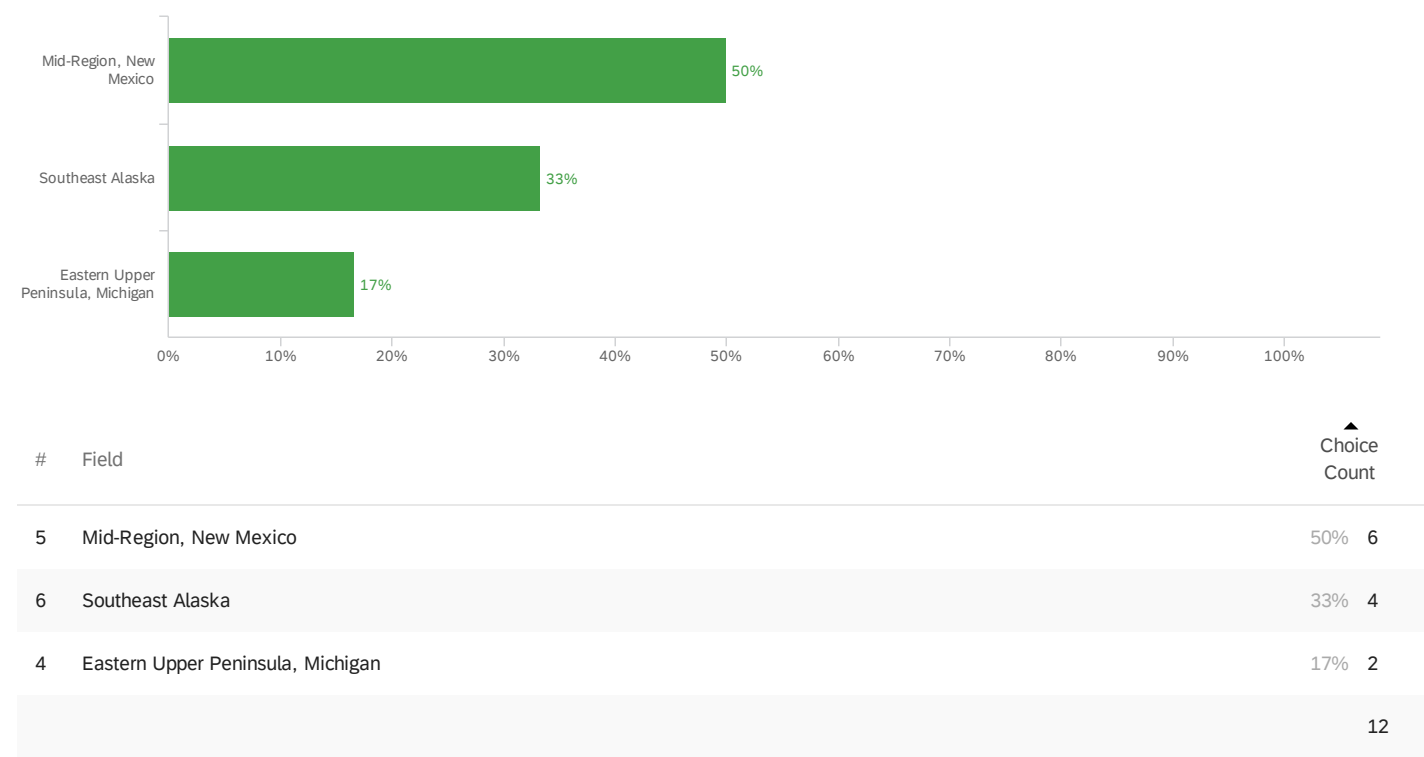
The CEDS is well organized and well written. Good job!

I asked a CEO of a very large business to review the document. His response was negative because he "didn't see any measurables". And I was unable to get a local economic development organization to consider linking a new strategy to this document due to "lack of credibility".

I think the next iteration of the document needs to be simple, actionable, provide accountability (who, what, where, when), and built in reporting.

The individuals/groups responsible for implementing these actions/strategies are not identified, in addition to the timelines/deadlines not being shown. There is a lack of accountability for who does what, and who the key partners to implement a goal are.

Q5 - Of the three examples of other CEDS action plans we shared, which one did you like the most? Click to view plans if you need a refresher: [Eastern Upper Peninsula](#), [Michigan Mid-Region](#), [New Mexico Southeast Alaska](#)



Showing rows 1 - 4 of 4

Q6 - What did you like about this action plan?

What did you like about this action plan?

A "key individual" was assigned to lead with state government support. This causes me to realize we don't have a champion to lead the effort - one who has built credibility with county and city governments. I reference this because of my experience discussing CEDS with a number of those agencies.

I prefer the look/format of both New Mexico and Alaska. Less text, more bullet points/spreadsheet format that allows for a streamlined approach that is easily understood and implemented.

I don't know enough to make a valid comparison, but I do know that the UP is experiencing a vibrant resurgence, which may be partially attributable to this effort.

I liked the idea of having separate approaches/plans for the same action items but for rural vs urban

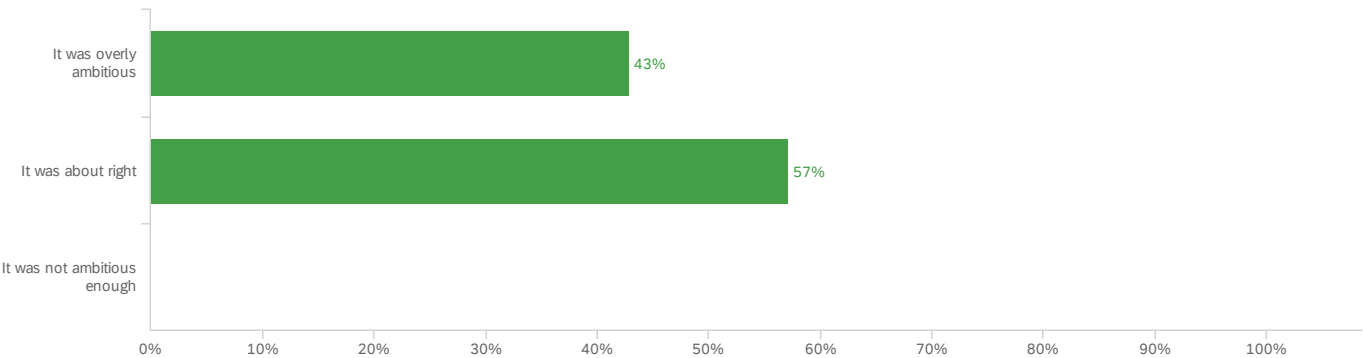
Easy to read. However, the Southeast Alaska one seems to have more data showing interesting and useful trends, the graphs were especially nice. I suggest a combination of these two.

Urban rural treated differently

I don't care for content/text over a grid, but the right elements of who, when and how we measure progress are in the Alaska format

I was intrigued by the separation of urban and rural - not for all things, but perhaps a realization that some projects need different paths forward to success based on population, geography, etc.

Q7 - How would you assess the scale and scope of the 2015 CEDS action plan?

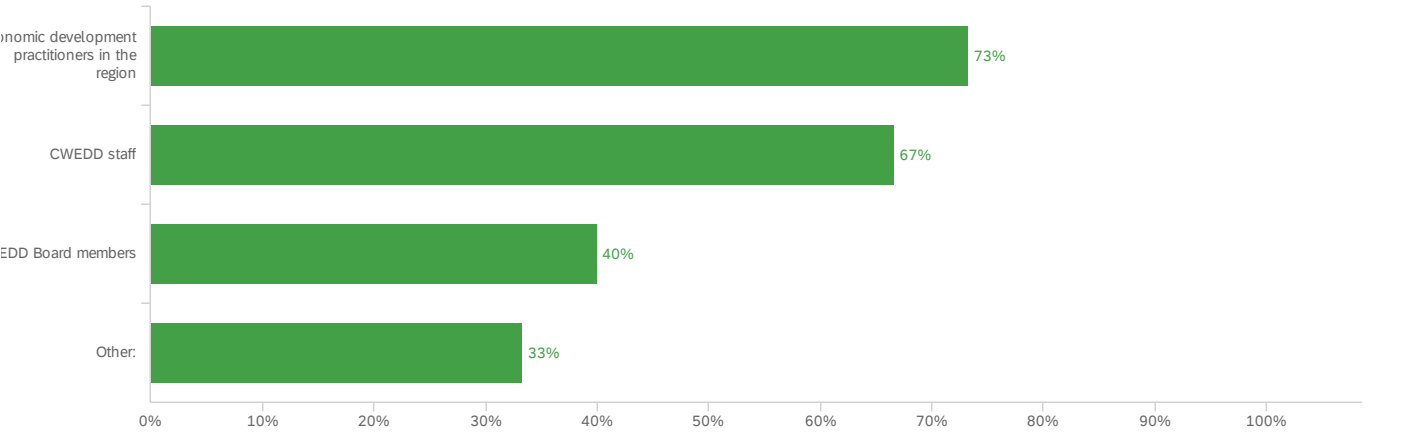


#	Field	Choice	Count
1	It was overly ambitious	43%	6
2	It was about right	57%	8
3	It was not ambitious enough	0%	0
			14

Showing rows 1 - 4 of 4

Q8 - Who do you think should be responsible for implementing the CEDS action plan?

Check all that apply.



#	Field	Choice Count
3	Economic development practitioners in the region	34% 11
1	CWEDD staff	31% 10
2	CWEDD Board members	19% 6
4	Other:	16% 5

32

Showing rows 1 - 5 of 5

Field	Count
-------	-------

Who do you think should be responsible for implementing the CEDS action plan? Check all that apply. - Selected Choice 15

Showing rows 1 - 1 of 1

Q8_4_TEXT - Other:

Other:

A third party with economic incentive

It's a collaborative effort. Practioners are doing the work. CWEDD board and staff need to provide support and connection to the work and the strategy

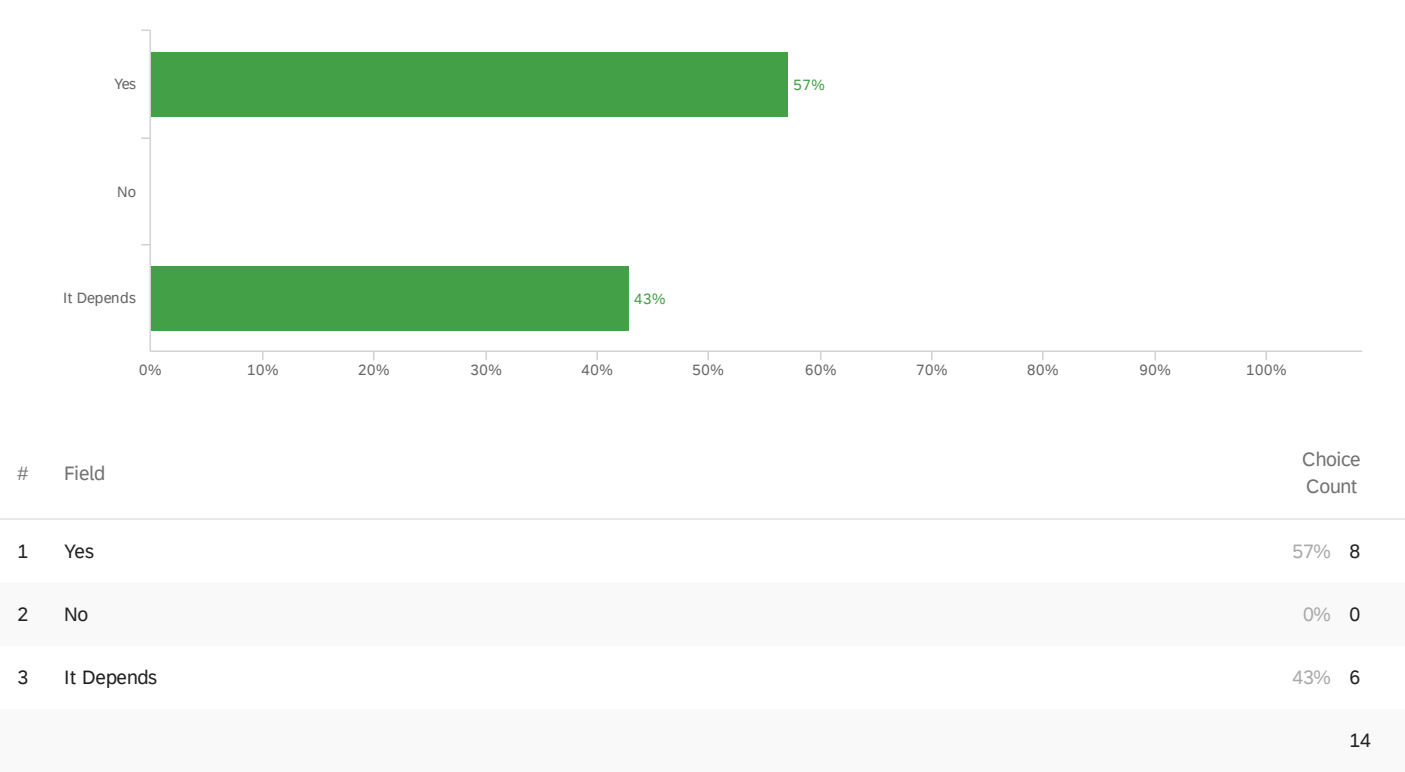
Other:

Regional partners that the plan includes

I think there needs to be a lead coordinator, but local EDOs should handle the boots on the ground work

a CEDS is more than just the basic definition of economic development work, it is also a guiding document which encompasses community infrastructure priorities and values. Local elected bodies need to have a sense of value of this document and ownership around using it

Q12 - Would you personally be willing to help implement the CEDS action plan?



Showing rows 1 - 4 of 4

Q14 - What factors would it depend on?

What factors would it depend on?

If we can work to gain credibility as mentioned above. I have already engaged in conversations that haven't gone well. As I have stated before, I believe that to gain credibility we need to engage others in the process. (Maybe the issue is only in my county?) But, have we determined why little or no progress has been made in the past five years? If we can't answer and resolve the issues related, we might as well plan on the same results.

Funding, achievable goals

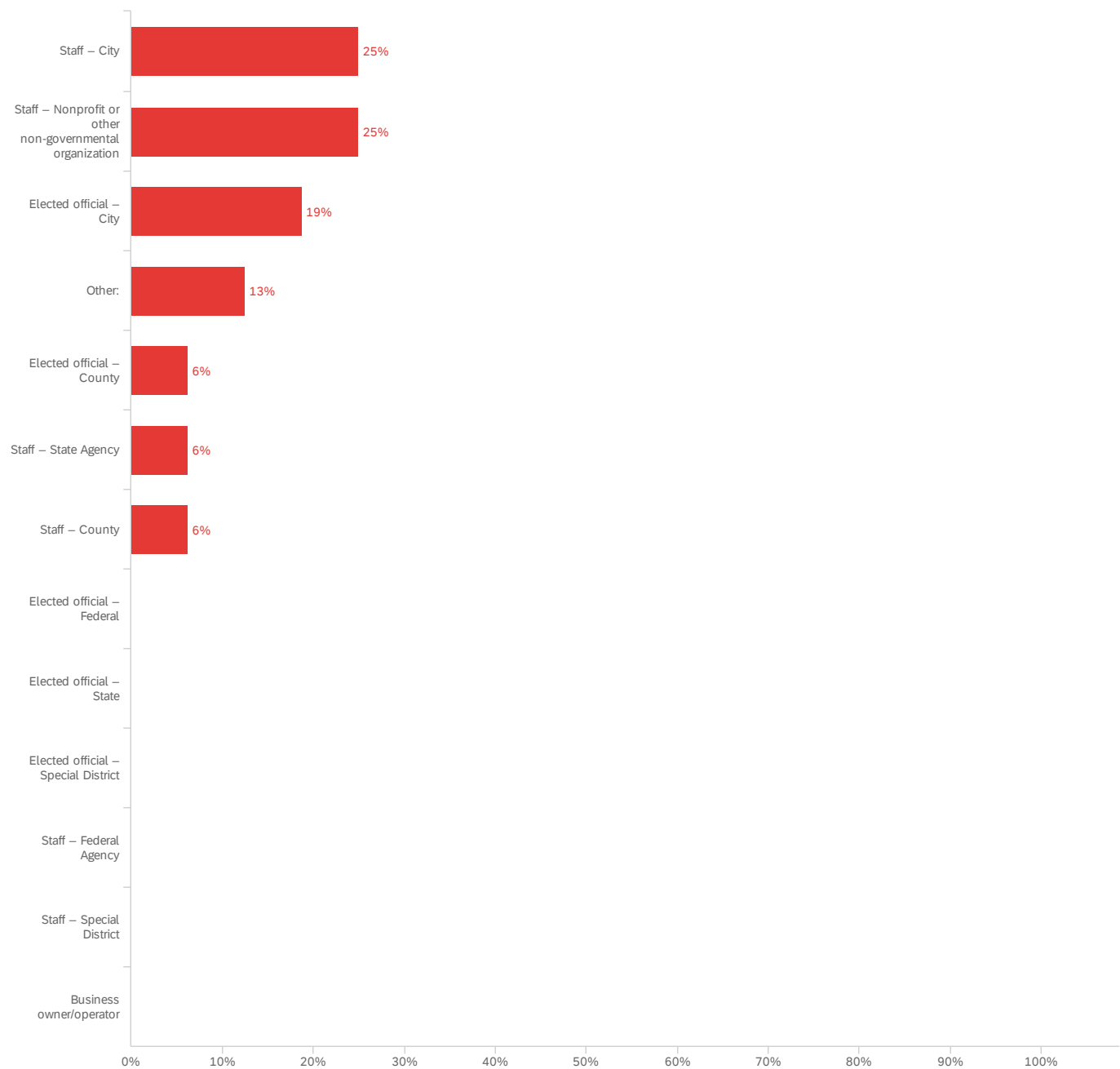
having specific goals ID'd

It depends on the scope of Goals 3. The term entrepreneurship can be defined both broadly and narrowly. The description appears to acknowledge a broad definition, but the action steps are pointed toward the narrower. My work allows me to support a broader effort, but the action steps would need to reflect that.

Time commitment required

Funding

Q12 - What best describes your current position? (Select all that apply)



#	Field	Choice Count
9	Staff – City	25% 4
11	Staff – Nonprofit or other non-governmental organization	25% 4
4	Elected official – City	19% 3
13	Other:	13% 2
3	Elected official – County	6% 1

#	Field	Choice Count
7	Staff – State Agency	6% 1
8	Staff – County	6% 1
1	Elected official – Federal	0% 0
2	Elected official – State	0% 0
5	Elected official – Special District	0% 0
6	Staff – Federal Agency	0% 0
10	Staff – Special District	0% 0
12	Business owner/operator	0% 0
		16

Showing rows 1 - 14 of 14

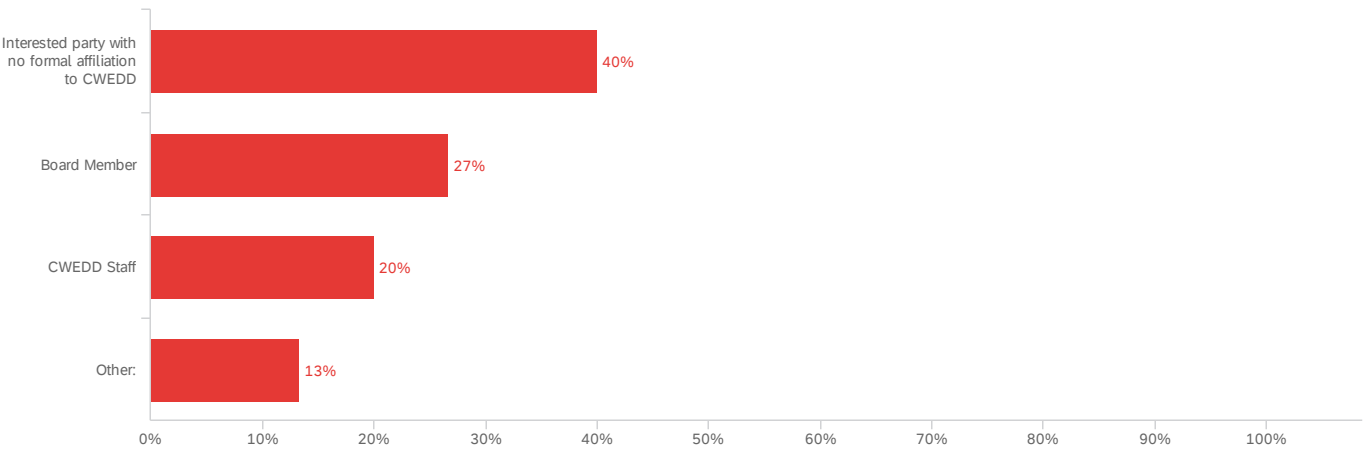
Q12_13_TEXT - Other:

Other:

COG

OCWCOG

Q13 - What is your relationship to CWEDD?



#	Field		Choice Count
3	Interested party with no formal affiliation to CWEDD	40%	6
1	Board Member	27%	4
2	CWEDD Staff	20%	3
4	Other:	13%	2

15

Showing rows 1 - 5 of 5

Q13_4_TEXT - Other:

Other:

county-wide economic developer in the region

City Representative within CWEDD region and covered by CEDS doc

End of Report



September 17, 2020

To CWEDD CEDS Update Committee
From University of Oregon Institute for Policy Research & Engagement (IPRE) Team
SUBJECT ACTION FRAMEWORK UPDATE FINDINGS & RECOMMENDATIONS

FINDINGS

The following describes the feedback the UO IPRE team has received on the action framework to date. This includes findings from CEDS Update Meetings, feedback from CWEDD staff, and feedback provided in CEDS Update questionnaires.

- **CEDS actions were not completed.** Zero of the 30 actions listed in the 2015 CEDS were completed. Of the 30 actions, three are in progress, three have stalled, and 24 were never started. Of the 21 resilience strategies proposed in the Resilience Appendix, one was started and 20 were not started on a regional level.
- **The CEDS is our region's primary source of a collective economic vision.** Despite the lack of progress on specific actions since 2015, economic development practitioners and elected officials recognize the CEDS as an important guiding vision for the CWEDD region. While recent events like the COVID-19 Pandemic and wildfire destruction have highlighted vulnerabilities in the CWEDD region that may require new strategies in the CEDS, the primary goals identified in 2015 remain relevant today.
- **Flexible guiding strategies are more useful than specific, prescriptive actions.** Local and regional economic development practitioners are the primary users of the CEDS and use the document primarily when discussing or seeking federal funding. Economic development practitioners are typically familiar with the goals in the CEDS, but rarely interact with the document. While the high-level goals, objectives, and strategies in the 2015 CEDS provide useful vision for the region, the specific actions listed in the 2015 CEDS were mostly ignored. The level of specificity of many CEDS actions was not particularly useful to local and regional economic development practitioners since specific projects flow from their elected officials' priorities, not the CEDS. Unless there is pre-existing momentum around specific actions or a clear leader who can rally buy-in and momentum, it is unrealistic to think that specific CEDS actions will be accomplished in the next five years. It therefore might be more useful to revise the CEDS to emphasize flexible guiding strategies that can be easily adapted by local and regional economic development practitioners to meet the specific needs of their communities. Where possible, the CEDS should also highlight opportunities for regional collaboration.
- **Attach metrics to goals/strategies to allow for clear evaluation of progress.** Rather than measuring progress on the CEDS by actions completed, it may be more productive to attach clear metrics to goals and strategies included in the document. Metrics create a clear target but do not prescribe how to reach that target. This allows flexibility to local and regional economic development practitioners to implement projects appropriate to their contexts, while still working towards the targets identified in the CEDS.

- **The current CEDS Strategic Action Plan and Action Item Forms are cumbersome.** The Strategic Action Plan includes some unnecessary redundancies between objectives, strategies, and actions. The main action plan also doesn't identify leads for actions, making it difficult to quickly understand roles and responsibilities. Simplifying and clarifying the action plan through updated formatting may increase usability. Specific formatting feedback includes:
 - Clearly assign roles and responsibilities to strategies/actions
 - Attach timeframes to strategies
 - Create an action plan format that is visually attractive and easy to interpret

RECOMMENDATIONS

Based on feedback, the IPRE team suggests the following changes to the action framework of the CEDS. Some of these factors will be incorporated into the Strategic Action Plan chapter of the CEDS and others will be used within an updated executive summary.

Goals

- Simplify goal statements into broad topic areas
- Include an additional goal focused on resilience (so that the strategies proposed in the Resilience Appendix are incorporated into the main action plan)
- Update the information included under each goal in the Strategic Action Plan chapter to include:
 - How the goal supports economic resilience
 - How the goal supports equity and inclusion
 - Opportunities for regional collaboration
 - Desired outcomes, metrics, or targets for the goal

Strategies

- Merge the objective, strategy, and action statements into a concise strategy statement that can guide regional goals and be applicable to different localities within the region
- Include specific suggestions for how to accomplish the strategies, but do not frame these suggestions as required actions, merely ideas that can be adapted to meet the region's needs

General Formatting

- Incorporate call-out boxes to draw attention to important elements or quick references
- Incorporate a Gannt style chart as a timeline, including important milestones

EXAMPLE REVISION OF GOAL 2

Goal 2: Branding & Business Development

Local and regional businesses are the primary contributors to employment and economic activity. In order to thrive, the region must both support and retain existing businesses and industries. In addition, the region must be prepared to take strategic advantage of new opportunities that have regional economic significance or impact. By creating a culture of entrepreneurship, community members will seek out opportunities to improve their skills, access existing job opportunities, or start their own businesses.

Key Partners [List primary players who will help implement strategies]	Targets [List desired outcomes/metrics for this goal]
Strategies <i>What will guide regional economic development?</i>	Branding Develop internal (within Cascades West Region) and external branding and marketing plan. Align tourism promotion with regional marketing strategy. Business Development Support the development of existing and new business. Adopt a business development strategy for businesses in target clusters. Encourage businesses to develop, test and implement continuity of operations plans.
Regional Collaboration <i>Opportunities for regional collaboration</i>	Coalesce efforts around the following industry sections: software/technology, food and beverage, education technology/research, advanced manufacturing, value-added forest products, university-related spinoffs, health, marine, agriculture, bioscience, and natural textiles
Resilience <i>How will these strategies build regional resilience?</i>	Diversification of industries – encouraging new business growth, particularly growth into new sectors, will help the region weather shocks by ensuring the region does not have “all of its eggs in one basket” Pre-disaster planning for response & continuity – encouraging and supporting the development of continuity of operations plans for businesses will better prepare businesses to withstand shocks
Equity & Inclusion <i>How will these strategies build a more equitable and inclusive region?</i>	Focus support on women- and Black, Indigenous, and People of Color-owned businesses – developing specific programs to support these traditionally disenfranchised groups will build a more equitable demographic distribution in business ownership

Implementation Ideas

How can the strategies be implemented?

Branding

Convene a group of economic developers from across the region to develop the branding and marketing plan

Develop branding materials to share with County and City economic development department that can be easily incorporated into their marketing efforts

Business Development

Create and promote a database of incubators, accelerators, capital sources and support services available in the region

Establish a network of local and regional navigators to help entrepreneurs through permitting and other processes

Increase the availability of educational opportunities to regional businesses interested in international trade on the advantages of exporting their goods and services

Work with Small Business Development Centers (SBDCs) to develop low-effort business continuity of operations planning resources

Incentivize investments in business resilience for businesses that have business continuity plans (e.g. reduce business license fees; 1% reduction in property taxes (or other tax) for businesses that have an employee preparedness training program; expedite plan review for hazard retrofit/mitigation projects)

Develop programs specifically targeted to support women- and Black, Indigenous, and People of Color-owned businesses

Timeline

Goal 2: Branding & Business Development	Y1	Y2	Y3	Y4	Y5
Target 1					
Target 2					
Target 3					

Survey Results

CWEDD CEDS 2020 - Actions Items Round 2

December 16, 2020 1:48 PM PST

Q1 - Do you have any additional feedback that has not been captured within Action

Framework Findings & Recommendations memo? (Leave blank if you have no feedback.)

Do you have any additional feedback that has not been captured within Actio...

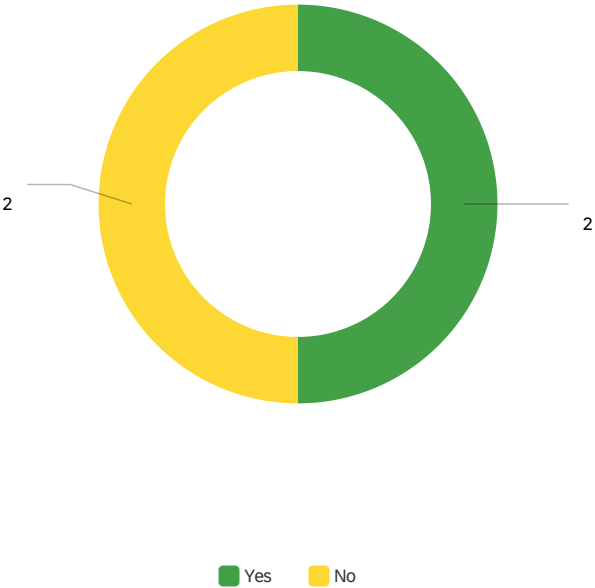
Very good overview - but I'd also like to see some way to address/include references or connections to more local planning efforts (closer to boots on the ground)

The organizations and individuals responsible for the metrics/goals need to be clearly specified.

Considering the lack of progress to date, do we need to go back the core purposes being networking and access to federal funding? So much of our effort is focused on creating an economic development framework, which can come across as an attempt to create a regional economic development organization that drives the direction of existing economic development organizations. That isn't networking. This comes across as driving direction into those organizations. Is this a factor in why participation is floundering, even by those who were engaged in developing the strategy? I believe our next step ought to be focusing on why we haven't gotten traction and work to address those factors. As a side note, CWCOG agreed a couple years ago that we didn't support a single regional economic development organization. But networking of existing organizations across the four counties, in my view, makes a lot of sense.

I apologize in advance if my tone appears to be harsh. The conclusion that the CEDS should not incorporate action items runs completely contrary to my interpretation of, and interest in, the effort. This statement from "Findings" was eye-opening: " Local and regional economic development practitioners are the primary users of the CEDS and use the document primarily when discussing or seeking federal funding." In this frame of reference, the CEDS is not an Economic Development Strategy, but rather a multi-faceted vision statement. As described, it is published in the hope that municipalities' own efforts will align. It cannot be expected to foster change without a more intentional framework. I would likely not be able to devote effort to the CEDS as described here, unless my work is already ticking one or more of the boxes.

Q23 - Are there other categories or factors you would like to see included under each goal?



Q24 - What other categories or factors would you include under each goal?

What other categories or factors would you include under each goal?

Some sort of sense of scale/cost to hit the goal - I'm not talking about a budget or anything, but some sense of what type and level of the various capitals are needed (monetary, time, political, expertise, etc.)

A "why" section, the reasoning and data supporting why each goal has been chosen and should be supported by the key organizations working to obtain it.

Q26 - Strategies

Strategies

Branding can leave out many individual entrepreneurs and can be non-intentionally exclusive, Taking a lot of time to develop and leaving less opportunity for inclusive.

The example doesn't really talk about strategies, it talks about action items or things to do...

Q28 - Key Partners

Key Partners
Change from "Key Partners" to "Responsible Organizations".

Q6 - Regional Collaboration

Regional Collaboration

Regional Collaboration makes sense as a category, but then the key players participating and collaborating need to be identified. What is in this section seems more like a strategy.

Q8 - Equity and Inclusion

Equity and Inclusion

Open critical communications with programs that attempt to disrupt public responsibilities from aiding disenfranchised groups.

Q22 - Timeline

Timeline

Perhaps just a simple "deliverables" and the due date (e.g. Q4 2022) for that deliverable, along with the responsible organization would be better...

Q13 - What is your relationship to CWEDD?

#	Field	Choice Count
1	Board Member	50% 2
2	CWEDD Staff	0% 0
3	Interested party with no formal affiliation to CWEDD	50% 2
4	Other:	0% 0

4

Showing rows 1 - 5 of 5

Q12 - What best describes your current position? (Select all that apply)

#	Field	Choice Count
1	Elected official – Federal	0% 0
2	Elected official – State	0% 0
3	Elected official – County	0% 0
4	Elected official – City	50% 2
5	Elected official – Special District	0% 0
6	Staff – Federal Agency	0% 0
7	Staff – State Agency	0% 0
8	Staff – County	0% 0
9	Staff – City	0% 0
10	Staff – Special District	0% 0
11	Staff – Nonprofit or other non-governmental organization	25% 1
12	Business owner/operator	0% 0
13	Other:	25% 1
		4

Showing rows 1 - 14 of 14

Q12_13_TEXT - Other:

Other:

Economic Developer for Lincoln County

End of Report



Date: 10/21/20

To CWEDD Board, Staff, and Interested Parties
From Aniko Drlik-Muehleck and Melissa Graciosa, Institute for Policy Research & Engagement
SUBJECT **OCTOBER 2020 MEETING SUMMARY – IMPLEMENTATION STRUCTURE**

OVERVIEW

On October 15th, 2020, 20 members of the Cascades West Economic Development District (CWEDD) met to discuss updates to the Comprehensive Economic Development Strategy (CEDS). The October meeting focused on creating updates to the Implementation Structure. A team from the University of Oregon's Institute for Policy Research & Engagement (IPRE) facilitated the meeting. This was the third of the CWEDD CEDS update meetings.

Meeting Goals & Activities

The meeting had two main goals:

- Develop a shared understanding of how the CEDS is currently used to help inform an implementation structure that will better meet the needs and capacity of CWEDD and its economic development partners
- Brainstorm modifications to the CEDS Implementation Structure

To begin, the IPRE team reviewed the CEDS update project timeline. The IPRE team has begun to make updates to the SWOT and Action Plan chapters based on findings from the CEDS update meetings and data collected through surveys. A full draft of the CEDS is expected in December. Nick Meltzer, from Oregon Cascades West Council of Governments (OCWCOG) made an additional project announcement that potential changes to the vision and goal statements of the 2020 CEDS will be discussed at the next CWEDD board meeting.

Before diving into discussion about how the CEDS will be used in this next update cycle, the IPRE team reviewed responses to the Action Plan survey that was sent out September 17th, 2020. Next, an IPRE team member presented an overview of the CEDS purpose as described the Economic Development Administration. The meeting was then split into two groups for small group discussions; one group consisted of practitioners and the other was made up of elected officials and staff. Groups discussed how they interact and use the CEDS currently, how they would like to use the CEDS in the next 5 years and additional support and services needed to do so. Small groups returned to the main session to share insights from their break-out rooms.

Next, an IPRE team member reviewed the implementation structure as it is outlined in the 2015-2020 CEDS and shared initial findings from the October survey. IPRE team members facilitated two small group brainstorms on potential changes to the implementation structure focused on ways of supporting regional collaboration, accountability, and leveraging existing capacity. The meeting concluded with small groups returning to the main session and sharing key takeaways from their discussions.

KEY TAKEAWAYS

The following sections of this memo summarize the discussion around CEDS use and ideas generated around implementation structure. Note that IPRE will summarize and share responses to the completed October survey prior to the November CEDS Update Meeting, but those responses are not included here since the survey will remain open through the end of October.

CEDS Use

Meeting attendees considered the use and purpose of the CEDS document as outlined by the EDA and compared its intended use to how it has been applied in the CWEDD region. In small groups, meeting attendees discussed the following prompts:

- How do you currently use the CEDS?
- How do you want to use the CEDS in the next five years?
- What support or services will you need in order to accomplish using the CEDS?

Overall, most meeting attendees affirmed that the CEDS is not a central document in their work within economic development. However, there is still energy around this update cycle with a strong desire to use the CEDS to support work that is already being done by practitioners, strengthen regional collaboration, and serve as a reference for aligning other economic development plans.

Current Use

- Prior to this update process, many meeting attendees did not know about or interact with the CEDS.
- Those who have been part of update cycles in the past noted that the CEDS is required by the EDA.
- Those familiar with the CEDS have not used it or been equipped with the tools/capacity to use it.
- The CEDS centralizes useful background information about the region for research purposes.
- A lot of the work that is outlined in the 2015-2020 CEDS document has been carried out by practitioners but has not been driven or aligned with the CEDS itself.

Future Use

- Meeting attendees want to be able to use the CEDS to stimulate and support regional collaboration efforts and increase access to federal funds.
- Local jurisdictions can use the CEDS during the development of their own strategic economic development plans in order to align their goals with broader regional goals, as appropriate.
- Practitioners discussed using the CEDS as a resource for presenting economic development priorities to different jurisdictional bodies.
- The CEDS should support the work that is currently being done by practitioners and create awareness of current economic development efforts.

Support and Services Needed

- Implementation of the CEDS will be supported by a plan that is clear, easy to use, and accessible.
- Meeting attendees agreed that increased awareness of the CEDS would support its use. Several ideas to increase awareness were posed to the group including increased web presence, targeted outreach, or a two-page explanation of what the CEDS is and how it can be applied.

- There is a need for a space, such as a webpage or platform, to share the work that is being done, what services are offered, or announcing existing needs.
- Additional resources for collaborative grant writing could support regional collaboration and avoid competition or duplicated efforts.
- Increased CWEDD staff and/or capacity could better support CEDS implementation.

Implementation Structure

Meeting attendees were asked to consider updates or changes to the implementation structure of the CEDS to improve regional collaboration, accountability, and leverage existing capacity. In small groups, meeting attendees discussed the following prompts:

- Should the working groups be organized by topic, geography, or other?
- Are these the correct topics? (Regional Economic Development Practitioners, Entrepreneurship and Innovation, Workforce Development, Rural Development) What needs to be added? Taken away?
- Who should be on these working groups? (# of people, representation across elected officials, practitioners, and business leaders)
- Who is responsible for convening these groups and creating accountability?
- What structure will support communication between the CWEDD board and working groups and ultimately the implementation of the CEDS?

Overall, meeting attendees identified that the obstacles to regional collaboration double as the obstacles to CEDS implementation. Though there was no strong conclusion at the end of this brainstorm, there was a clearly identified need for leadership that can act to convene and coordinate the working groups of the CEDS.

Working Group Organization

- Meeting attendees liked the idea of maintaining the working groups by topic, however working by geography has been the default.
- Topical groups offer practitioners, who are often focused within their geographies, the opportunity to contribute their local knowledge to support regional collaboration.
- Meeting attendees noted suggestions for how to support working groups and keep them accountable for meeting. These suggestions included support from OCWCOG, LCOG, CWEDD, or other economic development groups such as RAIN.
- Meeting attendees identified that CEDS implementation would be more successful if there was a clearly identified convening body that had the appropriate capacity for outreach and regional coordination.

NEXT STEPS

The IPRE team will use the input from this meeting, from the survey, and from CWEDD staff to begin drafting updates to the implementation structure. The next meeting on **Thursday, Nov, 19th 2020 from 9-10:30 am** will primarily address updates to the CEDS implementation structure and metrics.

LIST OF MEETING ATTENDEES

For a full roster of meeting attendees with affiliations and contact information, visit <http://www.ocwcog.org/economic-development/cascades-west-economic-development-district/ceds/>

Attendees

Alysia Rodgers	Jerry Sorte	Matt Michael
Judy Richter	Mary Walston	Heather DeSart
Cindy Perry	Ed Dreistadt	Paul Shuytema
Chris Workman	Melissa Murphy	John Pascone
Corey Wright	Jerry Sorte	
Pat Malone	Jim Lepin	

CWEDD Staff

Justin Peterson
Mike Corwin
Nick Meltzer
Ryan Vogt

IPRE Staff

Aniko Drlik-Muehleck
Claire Schechtman
Josh Bruce
Melissa Graciosa



Date: 11/24/20

To CWEDD Board, Staff, and Interested Parties
From Aniko Drlik-Muehleck and Melissa Graciosa, Institute for Policy Research & Engagement
SUBJECT **NOVEMBER 2020 MEETING SUMMARY – PERFORMANCE AND EVALUATION FRAMEWORK**

OVERVIEW

On November 19th, 2020, 19 members of the Cascades West Economic Development District (CWEDD) met to discuss updates to the Comprehensive Economic Development Strategy (CEDS). The November meeting focused on measuring performance and evaluation of the CEDS through a discussion on appropriate metrics. A team from the University of Oregon's Institute for Policy Research & Engagement (IPRE) facilitated the meeting. This was the final CWEDD CEDS update meeting.

Meeting Goals & Activities

The meeting had two main goals:

- Review the CEDS update timeline
- Brainstorm metrics that can be used to measure the performance and success of the CEDS as a regional strategy

To begin, the IPRE team reviewed the CEDS update timeline. The IPRE team has completed drafts of the SWOT, the Strategic Priority Areas, and has begun to make updates to the Implementation chapter based on findings from previous CEDS update meetings and data collected through surveys. A full draft of the CEDS is still on track to be completed in December.

To prime the discussion about success metrics, the IPRE team revisited survey responses from the kick-off meeting in July pertaining to the following:

- What makes a successful CEDS?
- What should be a part of this CEDS update cycle?

Next, meeting participants were asked to discuss what successful outcomes of the CEDS look like. An IPRE team member presented sample metrics to provide examples to support discussion. The meeting was split into smaller groups for break-out room discussions. Groups were divided based on strategic priority areas and included the following three groups:

1. Collaboration and partnerships
2. Infrastructure Resilience and Rural Vitality
3. Workforce support and Sector Diversification through Business Support

Groups discussed what the region could look like in five years in order to identify ways that success could be measured. The meeting concluded with small groups returning to the main session and sharing key takeaways from their discussions.

KEY TAKEAWAYS

The following sections of this memo summarize the discussion around successful outcomes of the CEDS and specific ideas generated around metrics. Note that IPRE also received one response to the questionnaire about success metrics posted prior to the November CEDS update meeting. The questionnaire responses will be included as part of the draft CEDS document in December.

What do successful outcomes look like?

Meeting attendees discussed the following prompts in small groups:

- What would successful outcomes look like?
- Where do we want to be in five years?

Meeting attendees affirmed the importance of regional collaboration and partnerships as a desired outcome throughout all of the strategic priority areas. Meeting attendees highlighted the importance of tracking throughout the implementation process, including using the occurrence of meetings as a means of tracking progress. Other attendees supported this claim by expressing the need to create both qualitative and quantitative metrics, noting that it is difficult to measure relationship-building, but it is those collaborations that are essential to successful outcomes of this CEDS update. Overall, the group highlighted the need to have a baseline understanding of who is within the economic development network and clearly defining communication channels in order to support future collaboration efforts.

The following sections summarize the desired outcomes discussed within smaller groups.

Collaboration and Partnerships

CWEDD would provide the capacity to facilitate regional collaboration and partnerships. Meeting attendees agreed that CWEDD's role as a regional convener should create opportunities and spaces for regional partners to interact and to facilitate regional conversations on the strategic priority areas. These opportunities should include CEDS implementation meetings, updates between these quarterly or semi-annual meetings, and centralizing access to opportunities and resources through the CWEDD webpage.

Increased access to regional funds would be a successful outcome of this CEDS cycle. Meeting attendees discussed potential additions to CWEDD's role as a regional entity to align the efforts of local economic development partners in seeking funding. Seeking funding opportunities for multiple jurisdictions at once can increase access and streamline efforts, as opposed to individual jurisdictions or localities all seeking their own funds and creating competition within the region or unnecessarily duplicating efforts.

Increased communication would support cross-sector or cross-department collaborations. Attendees described the need for strengthening communications coming from CWEDD as well as communication that happens within economic development organizations and agencies. For example, increased communication between economic development and transportation sectors or departments can lead to seeking funding and opportunities that benefit both. Increased communication can also support sharing resources or identifying needs amongst economic development partners. Sharing resources or program details can allow other jurisdictions to

duplicate successful initiatives without spending capacity reinventing what already exists, especially jurisdictions that are smaller or more rural.

Alignment of local economic development plans with the CEDS would support continuing collaboration. Individual jurisdictions can use the CEDS to align their local economic development plans with regional strategic priority areas. Alignment of local and regional documents should come from both directions; the CEDS should reflect broader regional strategies for economic development, while local plans should provide the detail of their local priorities and apply regional strategies when appropriate. Alignment of regional and local plans will continue to lay the foundation for collaboration at multiple levels.

Workforce and Business Support

Increased resilience within existing economic development programs and industry sectors, as well as sector diversification, should be an outcome of this CEDS cycle. Meeting attendees discussed business support as the balance between strengthening existing sectors and growing new sectors. Increasing the resilience of existing programs and sectors may promote innovation of new industries, and ultimately lead to increased sector diversification.

Growing and promoting talent retention within the region can be supported by collaborations between economic development and education fields. Meeting participants discussed cross-sector collaborations with educational institutions as a means of providing pathways for youth to access meaningful economic opportunities. Some channels exist for college-level students but growing connections with K-12 institutions can prevent regional brain drain.

Successful outreach to the workforce will include promoting meaningful economic opportunities to young families. Promoting the in-migration of young families into the region can increase available workforce as well as develop young children in the workforce pipeline. Additionally, emphasizing the region's livability factors can act as an outreach strategy.

Rural Vitality

Increased coverage and speed of broadband in rural communities is a desired outcome of this CEDS cycle. Throughout the CEDS update process, meeting participants have discussed the need to improve broadband access. Focusing on metrics of coverage and speed can track progress of broadband development both rurally and across the entire region. The information provided by [Speed Up America](#) can help with metric tracking over the next five years.

A baseline understanding of existing transportation access can support further development of connections between and within rural communities. Access to transportation can be a hurdle for rural residents trying to access essential services or economic opportunities. Meeting participants discussed the need to understand the current conditions in order to identify where regional connections should be improved.

Infrastructure Resilience

Infrastructure resilience was not discussed in great detail during small group discussions. The small group discussion touched on the need to develop affordable housing and broadband.

NEXT STEPS

The IPRE team will use the input from this meeting, from the success measures questionnaire, and from CWEDD staff to begin drafting updates to the performance and evaluation chapter of the CEDS. This was the final CEDS update meeting. A draft of the complete document will be posted for public review in mid-December.

LIST OF MEETING ATTENDEES

For a full roster of meeting attendees with affiliations and contact information, visit <http://www.ocwcog.org/economic-development/cascades-west-economic-development-district/ceds/>

Attendees

Biff Traber	Jim Lepin	Paul Shuytema
Kelly Hart	Jerry Sorte	Greg Irvin
Matt Michael	Jodi Mescher	Courtney Griesel
Heather DeSart	Melissa Murphy	Austin Ramirez
Alysia Rodgers	Seth Sherry	Charlie Michell
Corey Wright	Judy Richter	
Cindy Perry	Sean McGuire	

CWEDD Staff

Justin Peterson
Mike Corwin
Brenda Wilson
Ryan Vogt

IPRE Staff

Aniko Drlik-Muehleck
Claire Schechtman
Melissa Graciosa

Default Report

CWEDD CEDS 2020 - Success Measures

December 16, 2020 1:54 PM PST

Q2 - Share any ideas you have for how CWEDD can measure success in the Strategic

Priority Area of Regional Collaboration & Partnerships. You can provide specific metrics or

just generally describe what success would look like in this area. E.g. More projects

initiated that span multiple jurisdictions; stronger relationships between economic

development organizations in all four counties

Share any ideas you have for how CWEDD can measure success in the Strategic...

Number of meetings per year, cities/counties/industries represented at meetings, newsletters published each year, working groups established each year

Q21 - Share any ideas you have for how CWEDD can measure success in the Strategic Priority Area of Sector Diversification through Business Development. You can provide specific metrics or just generally describe what success would look like in this area. E.g. Stronger connections between incubators/accelerators and SBDCs; CWEDD's website becomes a known and used information hub

Share any ideas you have for how CWEDD can measure success in the Strategic...

Resource list established, attendees at board/staff meetings throughout the year, metrics from our local partners that feed up to a regional benefit.

Q23 - Share any ideas you have for how CWEDD can measure success in the Strategic Priority Area of Infrastructure Resilience. You can provide specific metrics or just generally describe what success would look like in this area. E.g. More regional projects initiated to retrofit aging infrastructure; CWEDD supports grant writing for five different projects

Share any ideas you have for how CWEDD can measure success in the Strategic...

a list of projects should be established first, and how they support the different activities of economic development. after a list, possible funding sources, and after that, some coordination/collaboration on grant writing. m

Q26 - Share any ideas you have for how CWEDD can measure success in the Strategic Priority Area of Workforce Support. You can provide specific metrics or just generally describe what success would look like in this area. E.g. Higher ed better understands the skills local businesses need from their future employees

Share any ideas you have for how CWEDD can measure success in the Strategic...

housing and transportation costs should be included in here somewhere. maybe also supporting housing efforts in general somehow?

Q27 - Share any ideas you have for how CWEDD can measure success in the Strategic Priority Area of Rural Vitality. You can provide specific metrics or just generally describe what success would look like in this area. E.g. Rural residents have better access to telehealth services; stronger relationships between rural schools/ESDs and economic developers

Share any ideas you have for how CWEDD can measure success in the Strategic...

Offering support for core services to local communities (technical assistance in transportation, land use, housing) so that they can accommodate and welcome the growth. Broadband should probably be in there. increased transportation coordination? Maybe even increased transit?

Q12 - What best describes your current position? (Select all that apply)

#	Field	Choice Count
11	Staff – Nonprofit or other non-governmental organization	100% 1
1	Elected official – Federal	0% 0
2	Elected official – State	0% 0
3	Elected official – County	0% 0
4	Elected official – City	0% 0
5	Elected official – Special District	0% 0
6	Staff – Federal Agency	0% 0
7	Staff – State Agency	0% 0
8	Staff – County	0% 0
9	Staff – City	0% 0
10	Staff – Special District	0% 0
12	Business owner/operator	0% 0
13	Other:	0% 0
		1

Showing rows 1 - 14 of 14

Q13 - What is your relationship to CWEDD?

#	Field	Choice Count
2	CWEDD Staff	100% 1
1	Board Member	0% 0
3	Interested party with no formal affiliation to CWEDD	0% 0
4	Other:	0% 0

1

Showing rows 1 - 5 of 5

End of Report

Appendix B: Community Profile

This appendix links to three data appendices from the 2015 CEDS:

- **Appendix C: Socioeconomic Profile** – Information about CWEDD’s demographics and economic sectors
- **Appendix D: Community Resources** – Information about funding, government regulations, infrastructure, recreation, leisure, and historic assets, education assets, and health care assets.
- **Appendix E: Natural Resources** – Information about the region’s land, water, and air.

All three Appendices can be accessed through via this link: http://www.ocwcog.org/wp-content/uploads/2017/10/CEDS_VolumeII_AppendixesFinal1.1.pdf

The data in these profiles has not been updated – all information presented is from 2015 or earlier. During the 2025 update of the CWEDD CEDS, the region’s community profile information should be updated with current data.

Appendix C:

Economic Resilience Metrics: Measurement Framework & District Profile



July 2021



Photos courtesy of Gary Halvorson, Oregon State Archives

Cascades West Economic Development District



Acknowledgements

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Justin Peterson, Community & Economic Development Planner, Oregon Cascades West Council of Governments



About the Institute for Policy Research and Engagement



**School of Planning, Public
Policy and Management
Institute for Policy
Research and Engagement**

The Institute for Policy Research & Engagement (IPRE) is a research center affiliated with the School of Planning, Public Policy, and Management at the University of Oregon. It is an interdisciplinary organization that assists Oregon communities by providing planning and technical assistance to help solve local issues and improve the quality of life for Oregon residents. The role of IPRE is to link the skills, expertise, and innovation of higher education with the transportation, economic development, and environmental needs of communities and regions in the State of Oregon, thereby providing service to Oregon and learning opportunities to the students involved.

Project Background

In 2015, the U.S. Department of Commerce's Economic Development Administration (EDA) developed updated guidelines for communities creating or updating a Comprehensive Economic Development Strategy (CEDS). For the first time ever, CEDS guidelines now include an emphasis on **economic resilience**. The Cascades West Economic Development District (CWEDD) incorporated economic resilience into both the 2015 and 2020 updates of the District's CEDS. While the concept of economic resilience has always existed (whether or not it has been called "economic resilience"), growing interest in the topic has created an opportunity for economic developers to explore resilience strategies more deeply.

To strategically grow a region's economic resilience, it is critical for economic developers to first understand a region's baseline level of resilience. A baseline assessment reveals areas of strengths and weaknesses that help economic developers target their efforts to build resilience. As CWEDD began the process of updating the CEDS in 2019, the District directed the University of Oregon's Institute for Policy Research & Engagement (IPRE) to perform a baseline assessment of the region's economic resilience.

After a review of the literature on resilience metrics and assessments, IPRE found no user-friendly guidelines that practitioners could implement to conduct a baseline and ongoing assessment of economic resilience. Measuring resilience can be quite challenging. In a complex, integrated system, it is difficult to tease out different factors that may impact resilience, and more difficult still to find reliable data to measure these resilience factors.

Because no standard way of measuring resilience exists, IPRE undertook the development of a framework that CWEDD (and other economic developers) could use to assess economic resilience. We relied on two guiding principles as we developed the framework:

1. **Holistic lens – economies are built on communities.** An economy is more than just firms and workers. Its resilience stems from underlying factors that influence the health, safety, and happiness of the community. Therefore, economic resilience encompasses more than just the diversity and productive capacity of firms. It must also consider factors that support happy and healthy communities of people.
2. **Accessibility – measuring resilience must be straightforward.** Economic development practitioners have limited time and resources to dedicate towards assessing economic resilience. Any measurement framework should rely on data that is easily accessible and analysis that is relatively simple to complete.

With these two principles in mind, IPRE developed the Eight Questions Framework presented here for measuring economic resilience. The Eight Questions are based on research and information presented by Restore Your Economy¹, a website that provides up-to-date economic resilience guidance, the Stockholm Resilience Centre², a trailblazer for resilience research, and case studies highlighted by 100 Resilient Cities,³ an initiative which investigated community-level resilience strategies. Pulling from these

¹ Restore Your Economy (<https://restoreyoureconomy.org/index.php>) is funded by the US EDA and maintained by the International Economic Development Council (IEDC) in partnership with the EDA.

² The Stockholm Resilience Centre (<https://www.stockholmresilience.org/>) is housed at Stockholm University that is "internationally recognised for its transdisciplinary research on resilience and complex social-ecological systems."

³ 100 Resilient Cities (<https://www.rockefellerfoundation.org/100-resilient-cities/>) was an initiative of the Rockefeller Foundation that retired in 2019 dedicated to "[helping] more cities build resilience to the physical, social, and economic challenges that are a growing part of the 21st century."

resources, IPRE built a straightforward framework for measuring economic resilience that can be adopted and adapted by both CWEDD and other economic developers.

Who should use this report?

Cascades West Economic Development District. This report is a compilation of stand-alone materials that:

- Explain the Eight Questions Framework
- Explain how to collect data and measure resilience “signal strength”
- Provide a baseline assessment of economic resilience by county that CWEDD staff can update on a regular basis to develop a picture of resilience changes over time

CWEDD should use the results of the resilience assessment to inform prioritization of projects suggested in the CEDS.

Other Economic Development Practitioners. The Eight Questions Framework for measuring economic resilience may also be useful to other economic developers and their partners. While we apply it here to data from CWEDD, the questions, data collection methods and sources, and resilience “signal strength” analysis can be applied to any region or jurisdiction. The CWEDD materials can provide inspiration to other areas wishing to adapt the framework to their specific context.

Organization of this Report

This report is a compilation of stand-alone materials and data reports that CWEDD can use in CEDS implementation and in conversation with partners. The Eight Questions Framework Introduction and Eight Questions Update Guide are the most relevant section for economic developers outside of CWEDD.

<u>8 Questions Framework Introduction</u>	Introduces the eight questions and how they relate to economic resilience. Each question includes a set of metrics and accompanying data sources that can be used to measure resilience “signal strength.”
<u>8 Questions Update Guide</u>	Provides specific instructions and data sources so anyone (in this case CWEDD staff) can perform the baseline resilience assessment and update the metrics over time to demonstrate how resilience has changed.
<u>County Profiles</u>	Presents the results of the baseline economic resilience assessment using the Eight Questions Framework for each of CWEDD’s four counties: Benton, Lane, Lincoln, and Linn.
<u>County Factsheets</u>	Presents a consolidated, two-page snapshot of economic resilience for each of CWEDD’s four counties and a few of each county’s larger jurisdictions.
<u>Maps</u>	Presents maps created by Oregon Cascades West Council of Governments staff to visualize some of the data used to answer the eight questions.

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Lincoln County Economic Resilience Factsheet D-1.3

Linn County Economic Resilience Factsheet D-1.4

E. Maps E-1

A. 8 Questions Framework Introduction

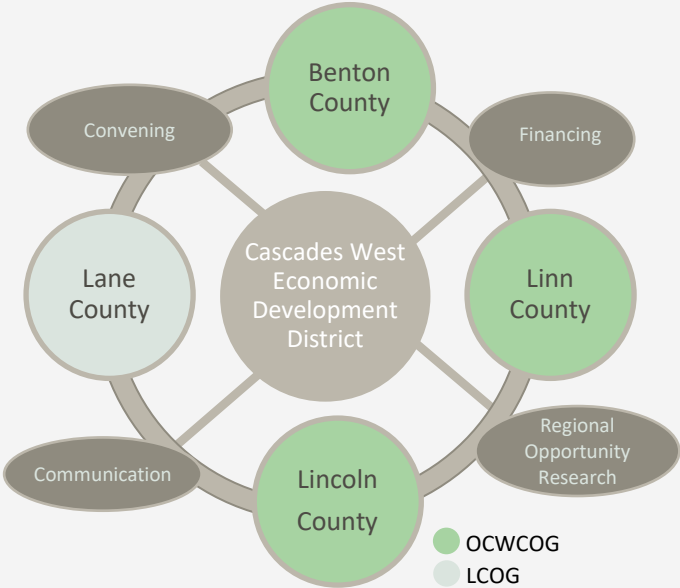


Introduction

In 2020, the Cascades West Economic Development District completed the Comprehensive Economic Development Strategy (CEDS) five-year update. The CEDS serves as the region’s primary source of a collective economic vision and details the key economic priorities and planning strategies for the next five years. The most recent update includes indicators to emphasize collaboration, equity and inclusion, and resilience in the planning and execution of the CEDS.

In addition, the 2020-2025 CEDS emphasizes the benefits of, and need for, economic resilience. Establishing economic resilience across the Cascades West region requires the ability to anticipate risk, evaluate how that risk can impact key economic assets, and build up the capacity to mitigate and respond to that risk. The Cascades West Economic Development District (CWEDD) plays a central role implementing the CEDS through organization and advocacy across Benton, Lane, Linn, and Lincoln counties. The CWEDD is committed to developing a more resilient regional economy, and has outlined six Principles of Economic Resilience that underscore every CEDS priority area. The six principles describe how resilience applies to every area of economic development. The principles also connect economic resilience with emergency management and disaster planning, which is particularly poignant after the global pandemic and subsequent ramifications in 2020. Please refer to the [2020-2025 CEDS to learn more about how the six principles of economic resilience](#) are integrated into the 5 CEDS priority areas.

The University of Oregon’s Institute for Policy Research & Engagement (IPRE) has developed a framework for the CWEDD to track economic resilience in the region and to complement the CEDS resilience indicators. The framework consists of eight questions that are answered using quantitative data and measured against predefined scales of resilience strength. There are a range of other methods and more sophisticated tools to evaluate economic resilience available. This framework is intended to be user-friendly and easy enough to execute frequently. Using a consistent method to evaluate economic resilience in each county helps the District compare indicators over time and identify ways to strengthen the entire region.



ABOUT THE CASCADES WEST ECONOMIC DEVELOPMENT DISTRICT REGION

#1

Linn County produces the most grass seed crops anywhere in the US . **Grasses are the highest in agricultural sales value for the state.**



A regional hub for advanced research across disciplines, including innovative technologies, teaching and education, marine and agricultural sciences

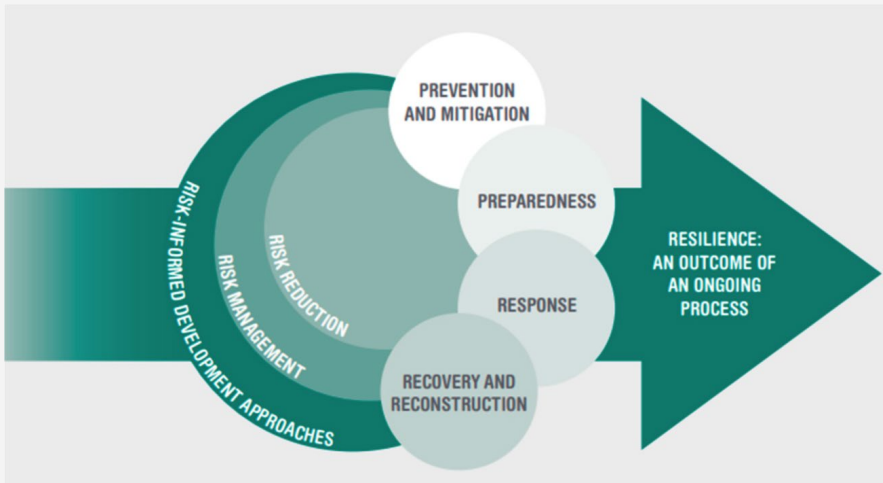
2 of
the Best

Corvallis and Eugene consistently rank among the **best college towns in the US.**

Located in the Willamette Valley, the Cascades, and the Central Oregon Coast, the four counties that comprise the CWEDD are geographically and economically diverse. CWEDD has a mix of larger cities with research universities, the rugged Oregon seacoast, high mountain passes of the Oregon Cascades, lush greenery, and the agricultural abundance of the Willamette Valley. It is considered an attractive destination for education, employment, culture and recreation.

Resilience can be described as the ability to anticipate, withstand, and bounce back from any type of shock or disruption. In a community and region, these shocks can include natural disasters, hazards, and the impacts of a changing climate, but also man-made economic disruptions such as the closure of a region’s large employer, the decline of an important industry, changes in the workforce, and population shifts. Economic resilience determines how quickly a community can recover following a disruption and how prepared a community is to withstand or avoid potential economic threats. Establishing resilience in a local or regional economy first requires an assessment of potential risks and an evaluation of the threats to people’s livelihoods and economic stability.

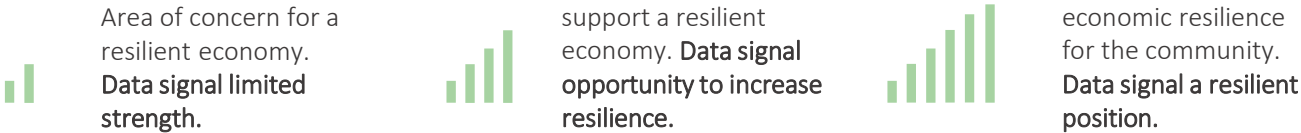
This framework asks **eight questions** to evaluate economic resilience at the county and community levels. To answer the questions, we use a combination of data sets to uncover resilience strengths and weaknesses. Data trends, over time, will demonstrate the impacts of policies and programs that are intended to improve resilience, and will indicate if the community is becoming more resilient. Each of the eight questions is relevant to economic resilience. By answering these questions, communities can identify how they are vulnerable, and take steps to address these impediments to resilience.



Measuring resilience is complex and depends on a variety of inputs. Characteristics of the state, county, and local economies can signal how well a community is prepared to withstand an unexpected disruption. Achieving economic resilience takes time and relies on coordination across agencies and communities. As described in the graphic to the left, building resilience is an ongoing process.

Infographic Source: Allam, Z.; Jones, D. Climate Change and Economic Resilience through Urban and Cultural Heritage: The Case of Emerging Small Island Developing States Economies. Economies 2019, 7, 62.

Gauging Resilience: Signal Strength Measures



This guide describes **eight questions** that collectively help measure economic resilience. It provides details about how to gauge resilience for each question, including data sources. Some data help answer more than one question, and most questions are answered using a combination of datasets. Measuring economic resilience is challenging because many factors impact a community’s ability to recover from a shock. The elements that contribute to a more resilient community are varied, and often independently managed. It is entirely possible for a community to demonstrate economic strengths and vulnerabilities at the same time.

What Indicates Resilience?		
1	Does the economy have diverse and well-paid jobs?	<p>Diversified economies are more resilient.</p> <ul style="list-style-type: none">+ A distribution of jobs in higher-wage industries indicates more economic resilience■ A concentration of jobs in a single industry indicates less economic resilience
2	What is the projected future of major employment industries in the region and nationally?	<p>Industries that are less subject to volatility are more resilient.</p> <ul style="list-style-type: none">+ A distribution of employment across industries that will likely remain stable indicates greater economic resilience■ A concentration of employment in industries that are regulated, taxed, or that rely on natural resources introduces more risk for economic resilience
3	What is the age breakdown of residents?	<p>A mix of young, working, and older populations is indicative of a more resilient economy.</p> <ul style="list-style-type: none">+ Populations that are active in the labor force promote economic resilience■ An aging population threatens economic resilience
4	Do people live and work in the community?	<p>In communities where people live and work, the local economy is more active and independent, and therefore more resilient.</p> <ul style="list-style-type: none">+ Mix of housing types and costs indicates greater economic resilience■ Limited affordable housing options and major commuter outflows indicates less economic resilience
5	How has the population grown in the last decade and what is predicted for the next 30 years?	<p>Growing populations indicate economic opportunities and resilience.</p> <ul style="list-style-type: none">+ Steady and continuous growth indicates greater economic resilience■ Sharp inclines and declines in populations indicate less economic resilience
6	Are residential homes able to withstand a natural hazard or weather incident?	<p>Newer homes are more likely to have been constructed to withstand natural hazards and weather incidents. Older homes and manufactured homes may be more vulnerable to damages and/or more difficult to repair.</p> <ul style="list-style-type: none">+ A sufficient supply of newer housing stock (built after 1970) indicates economic resilience■ Limited newer housing stock and a decline in homebuilding over the last decade indicates less economic resilience
7	What level of education attainment and earnings are residents reaching?	<p>Residents with advanced or specialized degrees have higher earning potential. Regions that have choices for advanced education (trade schools, community colleges, four-year colleges, and universities) are better positioned to support the training of local residents.</p> <ul style="list-style-type: none">+ Higher percentage of residents with advanced or specialized degrees indicates greater economic resilience■ Lower percentage of residents with advanced or specialized degrees indicates less economic resilience
8	Do residents have access to health and wellness facilities?	<p>Communities with health and wellness facilities are more resilient than communities that lack these facilities. People with health insurance contribute to a more resilient economy by reserving scarce public health resources for those most in need.</p> <ul style="list-style-type: none">+ Populations that are mostly insured and mostly located near health care facilities indicates greater economic resilience■ Populations that have lower insurance rates and that are located farther from health care facilities indicates less economic resilience

This Economic Resilience Framework (the eight questions) includes a package of evaluation tools. Each question uses a set of metrics to measure the “signal strength” according to the thresholds defined. Within every question, the datasets with the weaker signals should be noted for further investigation. Communities should aim to have full-power resilience signals for most datasets and may want to concentrate efforts where there is limited signal strength. The components of this Framework are described below.

8 Questions Framework Introduction

This Introduction serves as a guide for how to implement the Framework. It provides background and context and explains how the 8 Questions relate to economic resilience. Each question includes a set of metrics and accompanying data sources that are used to measure resilience signal strength. The questions, metrics, and signal strength levels are applied consistently, regardless of geography.

8 Questions Workbook + Update Guide

The 8 Questions Workbook is a template for data collection. The Workbook is an easy-to-use excel file that follows the same sequence of questions and metrics that are described in the Introduction. Completing the data workbook is the first step in evaluating economic resilience. A supplemental Update Guide is provided with the Workbook to provide further instructions for users.

County Profile

The County Profile reports the economic resilience data that were evaluated using the 8 Questions Framework and Workbook. Each report includes an introduction to the region and a summary of the findings, before presenting the findings for each question individually. The County Profile is data-driven and can only be drafted once data is collected and evaluated against the resilience signal strength levels.

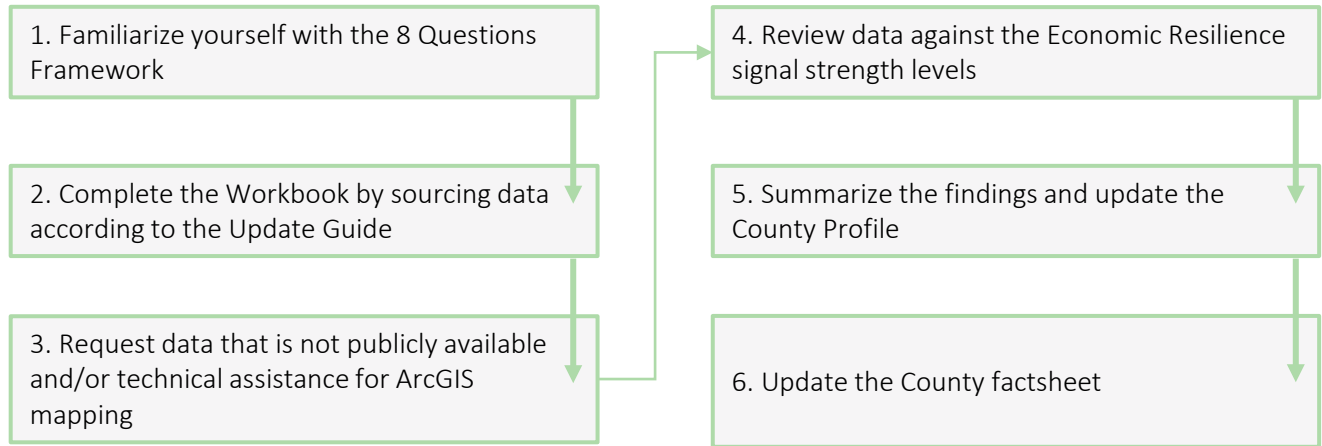
County Factsheet

The County Factsheet is a consolidated snapshot of economic resilience data for the County and four most populous cities within each county. County Factsheets are intended to provide at-a-glance comparison of data within a region and a consistent document to compare data from one County to another.

Maps

Within this Framework, there are questions that are best evaluated using ArcGIS mapping. Technical support for ArcGIS maps can be requested through regional resources like the Council of Governments.

Steps for Implementing this Framework



Economic Resilience County Profiles

The first section of each Economic Resilience profile includes a description of the area and contextual data to provide a brief introduction to the local economy.

The first page presents a series of at-a-glance data points and a summary of the stronger and weaker signals of economic resilience. The Quick Facts, detailed at right, include county-level data that are easy to compare to other counties, and relevant for regional economic resilience.

Quick Facts highlight the County population, the economic diversity, and the industries employing the most people.

Quick Facts

Population

Population as % of State Total

89,780

2%

Economic Diversity

0.636 (1/0.1) 8th Highest of 36 Oregon Counties

Top 3 Industries by Employment and Average Wages

#1 16.1%
Health Care & Social Assistance
\$59,203

#2 10.0%
Accommodation and Food Services
\$17,647

#3 9.8%
Retail Trade
\$26,891

Economic Diversity is measured using the Hachman Index. The index measures the mix of industries present in a particular region relative to a (well-diversified) reference region.

The **Top 3 industries** (by % of total employment) in the county are listed with the associated wages. The concentration and diversity of employment in the county relates directly to economic resilience.

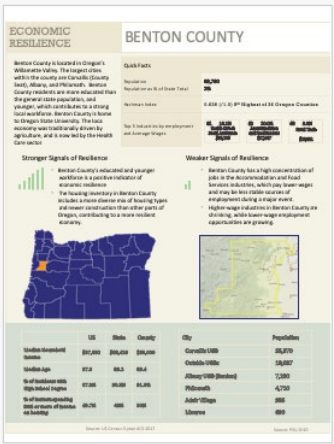
Rank of industry

#2 10.0%
Accommodation and Food Services
\$17,647

Percentage of jobs in the city/county that are in the industry

Average wages earned in the industry, in the city / county

Industry name



Page 1

A standardized explanation of the 8 Question Framework completes the profile introduction (pages 2 and 3). Following the introduction, each of the 8 questions is evaluated using region-specific data against a resilience strength scale. For each question, the different metrics are described, and for each metric a resilience strength is displayed in green. The thresholds for the signal strengths are explained below each question.

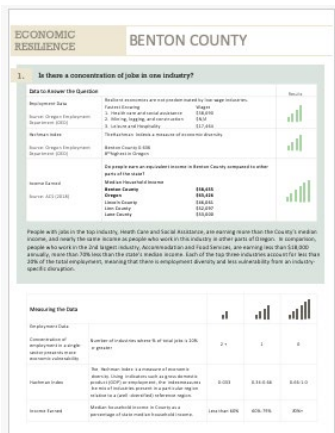
This guide serves as a central resource for Economic Resilience County Profiles in conjunction with the Economic Resilience Data template. The following pages describe how the 8 questions are measured and where to collect the relevant data.



Page 2



Page 3





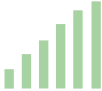
Page 4-11

Terms Used in Measuring Resilience

Term	Defined as
Age Dependency Ratio	Determined by measuring the number of dependents (young and old) in a population divided by the number of working-age people. This data point describes the level of pressure on an economy from supporting populations that are typically less active in the labor market.
Average Wages	Average of the wages earned in a particular job or industry occupation. Wages include tips, commissions, bonuses, vacation, and holiday pay, but do not include benefits.
Complete Kitchen / Complete Plumbing	Homes that have a sink with faucet, a stove or range, and a refrigerator meet the criteria for having complete kitchen facilities. Homes that have hot and cold running water, a flush toilet and a bathtub or shower meet the criteria for having complete plumbing facilities.
Cost-burdened / Severe cost-burdened Households	Households that pay more than 30% of their income for housing are considered cost-burdened. Households that pay more than 50% of their income for housing are considered severely cost-burdened.
Fastest Growing Industries (& wages)	Private industries with the highest percentage of total employment, as measured by Oregon Employment Department (OED).
Jobs to Homes Ratio	Used to examine the proportions of residents, jobs, and services in urban areas. The ratio is measured by dividing the total employment by total occupied housing units.
Median Household Income	Median of households' income earned in the past 12 months within a geography. Income includes the income of the householder and all other individuals 15 years and over in the household (whether or not they are related to householder).
Population Growth Rate	This rate expresses the percent change in population over a given time period.
Vacancy Rate	The proportion of housing units that are not seasonal or for sale that are not occupied.

1. Does the economy have diverse and well-paid jobs?

Why this impacts resilience:
Diversified economies are more resilient. Regions that have a concentration of jobs in fewer industries are less resilient.

Data to Answer the Question				
Employment Data	Of the 3 fastest growing industries, how many account for 20% or more of total area employment?	3	1-2	0
Economic Diversity	The Hachman Index is a measure of economic diversity. Using indicators such as gross domestic product (GDP) or employment, the index measures the mix of industries present in a particular region relative to a (well-diversified) reference region.	0-0.33	0.34-0.66	0.67-1.0
Income Earned	Median household income in the County as a percentage of state median income.	Less than 60%	60%-80%	More than 80%




Question 1 Data Collection

Data		Source
		Details
Employment Data	Top 3 Industries Wages, % of Total Jobs (County)	Oregon Employment Department (OED) - <i>By Request</i>
		"Top 3 private industries as a percentage of total employment"
	Fastest Growing Industries, Wages, % Change (County)	Oregon Employment Department (OED) - <i>By Request</i>
		"Fastest and Slowest Growing Employment Subsectors (Percentage basis)"
	Slowest Growing Industries, Wages, % Change (County)	Oregon Employment Department (OED) - <i>By Request</i>
		"Fastest and Slowest Growing Employment Subsectors (Percentage basis)"
Economic Diversity	Hachman Index	Oregon Employment Department (OED) - <i>By Request</i>
		https://www.qualityinfo.org/-/measuring-local-industry-employment-diversity-with-the-hachman-index
Income Earned	Median household income (County & State)	Social Explorer ACS 5-Year Estimates
		Table: (SE A14006) Median Household Income (using Inflation Adjusted Dollars)

2.

What is the projected future of major employment industries in the region and nationally?

Why this impacts resilience:
Industries that are shrinking nationally are less reliable, long-term sources of employment and contribute to a less resilient economy. Resilient economies are predominated by higher-wage industries. Industries that rely on natural resources, taxes, and international trade can be more susceptible to changing regulations. Employment that is concentrated in a narrow number of industries is less resilient than an economy with more industry diversity.

Data to Answer the Question				
Employment Data	Of the 3 fastest growing industries, how many offer wages above, or equivalent to, average wages in the county?	0	1-2	3
Current Events and National Trends	Articles that discuss growing and shrinking industries in Oregon may offer insights into potential economic and employment related risk.	News and Trends suggest industries will not prosper in the future	Nothing Noteworthy	News and Trends suggest industries are growing (regionally, nationally, globally)

Question 2 Data Collection

Data		Source
		Details
Employment Data	Fastest Growing Industries, Wages (County)	Oregon Employment Department (OED) - <i>By Request</i>
		"Fastest and Slowest Growing Employment Subsectors (Percentage basis)"
	Fastest Shrinking Industries, Wages (County)	Oregon Employment Department (OED) - <i>By Request</i>
		"Fastest and Slowest Growing Employment Subsectors (Percentage basis)"
Wages Earned	Annual Average Wages (County & State)	Quality Info / Quarterly Census of Employment and Wages -BLS
		Table: Annual Averages, All establishment sizes

3.

What is the age breakdown of residents?

Why this impacts resilience:
Communities that are resilient have a mix of younger and older populations, and a growing number of working-age residents. Higher concentrations of older or younger populations require more services from the public, particularly during an economic disruption.

Data to Answer the Question				
Population characteristics	Median Age	Over 50	40-50	Under 40
Workers over 55 stats	Percentage of population of people over 55 and employed full-time When the workforce is relying on an aging population it may be less sustainable.	More than 30%	15%-30%	Less than 15%
Age dependency ratio	The dependency ratio is the number of dependents in a population (under-18 and over-65) divided by the number of working-age (18-64) people, multiplied by 100. This data point describes the level of pressure on an economy from supporting the portions of the population least likely to be working.	More than 65.0	50.0-65.0	Less than 50.0



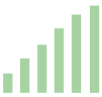
Question 3 Data Collection

Data		Source
		Details
Population Characteristics	Median Age	Social Explorer ACS 5-Year Estimates
		Table: (SE:A01004) Median Age by Sex
	Workers over 55	Oregon Employment Department (OED) - <i>By Request</i>
		"Number of Workers 55 and Over, Percent of All Ages"
	Age dependency ratio	US Census ACS 5-Year Estimates (prior 3 periods)
		Table: (S0101) Age and Sex Summary Indicators

4.

Do people live and work in the community?

Why this impacts resilience:
If people live close to where they work, productive time is not wasted on commuting and employment is more accessible during infrastructure disruptions. Communities that provide housing and employment options to residents of all income-levels are more resilient during a shock to the economic landscape.

Data to Answer the Question				
Housing and Employment Data	Jobs to Homes Ratio	Less than 0.75	More than 1.5	0.75-1.5
Cost of Living	Vacancy Rate	Less than 2.25%, More than 7%	2.25%-4.49%	4.5%-7%
	Percentage of households spending more than 30% of their income on housing (known as cost-burdened)	More than 25%	20-25%	Less than 20%
Commuting Patterns	Average commuting time	More than 26 min	20 min - 26 min	Less than 20 min
	Percentage of population that commute via walking, bicycling, or public transportation	Less than 5%	5%-10%	More than 10%
	Percentage of population that live and work in the county.	Less than 50%	50-75%	More than 75%



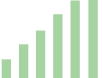
Question 4 Data Collection

Data		Source	
		Details	
Housing & Employment Data	Total Housing Units (County & State)	Social Explorer	ACS 5-Year Estimates
		Table: (SE:A10001) Housing Units	
	Total Employment (County & State)	Quality Info / Quarterly Census of Employment and Wages -BLS	
		Table: Annual Averages, All establishment sizes	
Cost of Living	Housing Tenure & Vacancy (County & State)	Social Explorer	ACS 5-Year Estimates
		Table: (SE:A10060) Tenure	
	Cost-burdened Households (County & State)	Social Explorer	ACS 5-Year Estimates
		Table: (SE:A10049, SE:A10051) Selected Monthly Owner Costs, (SE:A18002) Gross Rent as a % of Household Income	
Commuting Data	Average Commuting Time (County & State)	Social Explorer	ACS 5-Year Estimates
		Table: (SE:A09003) Average Commute to Work (In Min)	
	Transportation Mode (County & State)	Social Explorer	ACS 5-Year Estimates
		Table: (A09005) Means of Transportation to Work for Workers 16 Years and Over	
	Inflows/Outflows of residents	US Census Bureau OnTheMap	
		https://onthemap.ces.census.gov/	

5.

How has the population grown in the last decade and what is predicted for the next 30 years?

Why this impacts resilience:
Populations in decline signal a weaker (less resilient) economy. People often move to seek better employment or housing opportunities. A declining population is indicative of changing development/ settlement patterns and loss of potential workforce.

Data to Answer the Question				
Past Population Data	Percentage change in population in the past 10 years	Less than 1.5%	1.5-3%	More than 3%
Population Forecasts	Forecasts for population trends and net migration over the next 30 years relate to the economic drivers that attract and/or retain a growing population.	Declining	No significant Growth or Decline	Growing




Question 5 Data Collection

Data		Source
		Details
Population Growth Rate	Historical Population Changes (County & State)	Social Explorer ACS 5-Year Estimates
		Table: (SE:A00001) Total Population
Population Forecasts	30-year Forecasts (County & State)	Portland State University, Population Research Center
		https://www.pdx.edu/population-research/population-forecasts

6.

Are residential homes able to withstand a natural hazard or weather incident?

Why this impacts resilience:
Newer homes are more likely to have been constructed to withstand natural hazards and weather incidents. Older homes and manufactured homes may be more vulnerable to damages and/or more difficult to repair. Homes without plumbing, electricity or phone services are at a greater risk during an emergency. The capacity to recover quickly from a shock is greater when people (the workforce) are not displaced.

Data to Answer the Question				
Housing Data	Percentage of homes built in the last decade	Less than 4%	4-15%	More than 15%
	Percentage of homes built before 1970	More than 60%	40%-60%	Less than 40%
	Percentage of housing stock that is classified as mobile homes	More than 10%	5-10%	Less than 5%
Utility & Services	Percentage of homes without complete plumbing	More than 2%	1-2%	Less than 1%
	Percentage of homes without complete kitchens	More than 3%	1-3%	Less than 1%
	Percentage of homes dependent on any single fuel supply	More than 70%	60-70%	Less than 60%

Question 6 Data Collection




Data		Source	
		Details	
Housing Data	Housing Age (County & State)	Social Explorer	ACS 5-Year Estimates
		Table: (SE:A10055) Occupied Housing Units by Year Structure Built	
	Mobile Homes (County & State)	Social Explorer	ACS 5-Year Estimates
		Table: (SE:A10032) Housing Units in Structure	
Utilities & Services	Residential Facilities (County & State)	Social Explorer	ACS 5-Year Estimates
		Tables: (SE:A10029) Housing Units by Telephone Service Available, (SE:A10034) House Heating Fuel	
		US Census	ACS 5-Year Estimates
		Tables: (B25047) Plumbing Facilities for All Housing Units (B25051) Kitchen Facilities for All Housing Units	
	Home Heating Choices (County & State)	Social Explorer	ACS 5-Year Estimates
		Table: (SE:A10034) House Heating Fuel	

7.

What level of education attainment and earnings are residents reaching?

Why this impacts resilience:

People who attain higher education and/or have specialized skills are more likely to be employed and earn higher wages and less likely to primarily depend on public services. Regions that have educational opportunities can provide essential resources and training for local residents preparing to join the workforce. In addition, if economic conditions change and the local employment sectors shift, educational opportunities can be an asset for the community by offering community members new or additional training.

Data to Answer the Question				
Educational attainment and earnings	Percentage of population (25 years+) with Bachelor's Degree or higher	Less than 25%	25%-35%	More than 35%
	Median earnings of high school graduates (or equivalency) in the county as a percentage of median earnings of high school graduates in state	Less than 75%	75%-105%	More than 105%



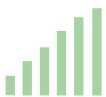
Question 7 Data Collection

Data		Source	
		Details	
Educational Attainment	Educational Attainment (County & State)	Social Explorer	ACS 5-Year Estimates
		Table: (SE:A12001) Educational Attainment for Population 25 Years and Over	
	Median Earnings by Educational Attainment (County & State)	Social Explorer	ACS 5-Year Estimates
		Table: (SE:A15001) Median Earnings by Sex by Educational Attainment (In Inflation Adjusted Dollars) (For Population Age 25+)	

8.

Do residents have access to health and wellness facilities?

Why this impacts resilience:
A resilient economy can consistently provide residents with basic needs, including shelter, safety, and food. Hospitals, clinics, and grocery stores are vital for preparing for, responding to, and recovering from a major disruption. High levels of baseline community health are important for resilience because communities with healthy residents are better able to absorb the impacts of, and recover from, disasters. Health insurance coverage is a positive indicator of community resilience.

Data to Answer the Question				
Hospital, urgent care, and pharmacy coverage	Percentage of population within 15 miles of a medical facility (hospital, urgent care, clinic)	Less than 40%	40-70%	More than 70%
Insurance Coverage	Percentage of uninsured (non-incarcerated) population	More than 11%	7-11%	Less than 7%

Question 8 Data Collection

Data		Source
		Details
Proximity to Food and Health Providers	Access to Health Services (County)	GIS Prepared by OCWCOG - <i>By Request</i>
		<i>Custom inventory of local data must be provided.</i>
Insurance Coverage	Insurance Coverage (County & State & National)	Social Explorer ACS 5-Year Estimates
		Table: (SE:A20001) Health Insurance

Key Findings



Stronger Signals of Resilience



Skilled and educated
workforce

People (over 25) in the CWEDD counties are graduating high-school and attending post-secondary institutions at rates similar to Oregon as a whole. Educational and training resources are available across the region.

Economic
Opportunity

Higher-wage jobs are found across the region. The health care and social assistance sector account for one of the highest percentages of employment in all four CWEDD counties. Average wages in this sector and other sectors with higher shares of employment are relatively high. County median income is close to state median income in every county.

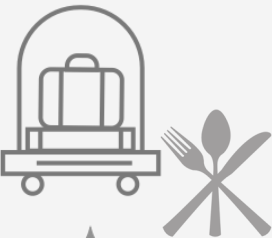


Population Growth

Counties in the CWEDD are growing steadily and at a similar pace to each other. Recent trends in growth are expected to continue according to the latest PSU population forecasts.



Weaker Signals of Resilience



Economic Diversity

Across the counties in CWEDD, there are concentrations of employment in the leisure and hospitality sector, including food and beverage establishments. These jobs usually offer lower wages and limited benefits to employees. The leisure and hospitality sector is particularly vulnerable when hazardous events prevent patronage.



Employment
Vulnerability

In three of the four CWEDD counties, the fastest growing industry sectors are in accommodation and hospitality services. The 2020 COVID-19 pandemic and subsequent “shut-downs” have been particularly hard-felt by food and drink establishments. Construction, another fast-growing industry in some counties, can be susceptible to shifts in the economy and government spending. Recent headlines describe uncertainty about the future of construction jobs in Oregon.



Housing

Housing is a regional challenge. In every CWEDD county, the majority of new housing was built more than a decade ago, and 50% of renters are cost-burdened (spending 30% or more of their income on housing).

B. 8 Questions Update Guide



“8 Questions” Excel Data Template – Update Guide

SNAPSHOT

Update each data point using the sources listed.

SNAPSHOT	QUICK FACTS			
		County	State	
	Population	122,870	4,081,943	
	Population as % of State Total	3.0%		
	Hachman Index Score	0.0. <---> 1.0		
	County Score (2019)	0.518		
	State Score (2018)		0.93	
	Top 3 Industries (2010-2019) as Percentage of Total Employment	Average Wages		
	INDUSTRY 1	\$12,121,212		
	INDUSTRY 2	\$12,121,212		
	INDUSTRY 3	\$12,121,212		
	Median Household Income	County	State	Co as % of State
		\$52,097	\$21,212,121	0.2%

Population (County & State)	PSU Population Research Center Annual Oregon Population Report Tables https://www.pdx.edu/population-research/population-estimate-reports
Hachman Index (County & State)	Oregon Employment Department (OED) By Request https://www.qualityinfo.org/-/measuring-local-industry-employment-diversity-with-the-hachman-index
Top 3 Industry (County)	Oregon Employment Department (OED) By Request “Top 3 private industries as a percentage of total employment”
Median Household Income (County & State)	Social Explorer ACS 5-Year Estimates Table: (SE A14006) Median Household Income (using Inflation Adjusted Dollars)

“8 Questions” Excel Data Template – Update Guide

QUESTION 1

Update each **data point** using the sources listed.

Question: Does the economy have diverse and well-paid jobs?

Diversified economies are more resilient. Regions that have a concentration of jobs in fewer industries are less resilient.

QUESTION 1 DOES THE ECONOMY HAVE DIVERSE AND WELL-PAID JOBS?			
Top 3 Industries (2010-2019) as Percentage of Total Employment	Average Wages	% of total Jobs	
INDUSTRY 1	\$12,121,212	0.0%	
INDUSTRY 2	\$12,121,212	0.0%	
INDUSTRY 3	\$12,121,212	0.0%	
Fastest Growing Industries (2010-2019)	Average Wages	Number Change	Percent Change (2010-2019)
INDUSTRY 1	\$12,121,212	0	0.0%
INDUSTRY 2	\$12,121,212	0	0.0%
INDUSTRY 3	\$12,121,212	0	0.0%
Fastest Shrinking Industries (2010-2019)	Average Wages	Number Change	Percent Change (2010-2019)
INDUSTRY 1	\$12,121,212	0	0.0%
INDUSTRY 2	\$12,121,212	0	0.0%
INDUSTRY 3	\$12,121,212	0	0.0%
Hachman Index # (2019)	0.518		
Median Household Income (2018)			Percent Change (2008-2018)
County	\$12,121,212		0.0%
State	\$21,212,121		99.0%
County median income as a % of state median income	57%		

Top 3 Industries Wages, % of Total Jobs (County)	Oregon Employment Department (OED) By Request
	“Top 3 private industries as a percentage of total employment”
Fastest Growing Industries, Wages, % Change (County)	Oregon Employment Department (OED) By Request
	“Fastest and Slowest Growing Employment Subsectors (Percentage basis)”
Fastest Shrinking (slowest growing) Industries, Wages, % Change (County)	Oregon Employment Department (OED) By Request
	“Fastest and Slowest Growing Employment Subsectors (Percentage basis)”
Hachman Index (County & State)	Oregon Employment Department (OED) By Request
	https://www.qualityinfo.org/-/measuring-local-industry-employment-diversity-with-the-hachman-index
Median Income (County & State)	Social Explorer ACS 5-Year Estimates
	Table: (SE A14006) Median Household Income (using Inflation Adjusted Dollars)



“8 Questions” Excel Data Template – Update Guide

QUESTION 2

Update each **data point** using the sources listed.

Question: What is the projected future of major employment industries in the region and nationally?

Industries that are shrinking nationally are less reliable, long-term sources of employment and contribute to a less resilient economy. Resilient economies are predominated by higher-wage industries. Industries that rely on natural resources, taxes, and international trade can be more susceptible to changing regulations. Employment that is concentrated in a narrow number of industries is less resilient than an economy with more industry diversity.

QUESTION 2 WHAT IS THE PROJECT FUTURE OF MAJOR EMPLOYMENT IN REGION?		
Fastest Growing Industries (2010-2019) by Percentage, in County	Average Wages	Wages Compared to Co Average
INDUSTRY 1	\$12,121,212	100.0%
INDUSTRY 2	\$12,121,212	100.0%
INDUSTRY 3	\$12,121,212	100.0%
Fastest Shrinking Industries (2010-2019) by Percentage, in County	Average Wages	Wages Compared to Average Annual
INDUSTRY 1	\$12,121,212	100.0%
INDUSTRY 2	\$12,121,212	100.0%
INDUSTRY 3	\$12,121,212	100.0%
Average Annual Wages (2018)		
County	\$12,121,212	
State	\$21,212,121	
Noteworthy Articles (URLs)		

Fastest Growing Industries, Wages (County)	Oregon Employment Department (OED) By Request
	“Fastest and Slowest Growing Employment Subsectors (Percentage basis)”
Fastest Shrinking (slowest growing) Industries, Wages (County)	Oregon Employment Department (OED) By Request
	“Fastest and Slowest Growing Employment Subsectors (Percentage basis)”
Annual Average Wages (County & State)	Quality Info / Quarterly Census of Employment & Wages (BLS)
	Table: Annual Averages, All establishment sizes

“8 Questions” Excel Data Template – Update Guide

QUESTION 3

Update each **data point** using the sources listed.

Question: What is the age breakdown of residents?

Communities that are resilient have a mix of younger and older populations, and a growing number of working-age residents. Higher concentrations of older or younger populations require more services from the public, particularly during an economic disruption.

QUESTION 3	WHAT IS THE AGE BREAKDOWN OF RESIDENTS			
		COUNTY	STATE	
	Total Population (2018)	100	4,081,943	
	Median age (years)	45	39.2	
	Number of Workers 55 and Over (2018), % of All Ages	20	20%	438,794 23%
	Dependency Ratios (2019)	COUNTY	STATE	
	Age dependency ratio	111.1	60.6	
	Old-age dependency ratio	111.2	26.1	
	Child dependency ratio	111.3	34.5	

Median Age (County & State)	Social Explorer ACS 5-Year Estimates
	Table: (SE:A01004) Median Age by Sex
Workers over 55 (County & State)	Oregon Employment Department (OED) By Request
	“Number of Workers 55 and Over, Percent of All Ages”
Age Dependency Ratio (County & State)	Census.Data.Gov ACS 5-Year Estimates (prior 3 periods)
	Table: (S0101) Age and Sex Summary Indicators

“8 Questions” Excel Data Template – Update Guide

QUESTION 4

Update each **data point** using the sources listed.

Question: Do people live and work in the community?

If people live close to where they work, employment is more accessible during infrastructure disruptions and productive time is not wasted on commuting. Communities that provide housing and employment options to residents of all income-levels are more resilient during a shock to the economic landscape.

QUESTION 4

DO PEOPLE LIVE AND WORK IN THE COMMUNITY?					
		COUNTY		STATE	
Housing and Employment Data (2018)					
Total housing units		50,000		1,750,539	
Total Employment		50,050		1,920,804	
Jobs to Homes Ratio		1.00		1.10	
Total Occupied Housing Units		55,050		1,591,835	
Housing Tenure & Vacancy (2018)		COUNTY	%	STATE	%
Owner-occupied		50,000	90.8%	985,523	61.9%
Renter-occupied		50,050	90.9%	606,312	38.1%
Occupied housing units		50,000	90.8%	1,591,835	100.0%
Vacant housing units		50,050	90.9%	37,931	2.4%
Cost of Living - Cost Burdened Households (2018)		COUNTY	%	STATE	%
Renter Occupied Housing		50,000		606,312	
Spending 30% or More		50,050		294,968	
% of Total Renter Occupied Housing Cost Burdened			100.1%		48.6%
Owner Occupied Housing Units (w and w/o mortgage)		50,000		985,523	
Spending 30% or More		50,050		253,149	

Total Housing Units (County & State)	Social Explorer ACS 5-Year Estimates
	Table: (SE:A10001) Housing Units
Total Employment (County & State)	Quality Info / Quarterly Census of Employment & Wages (BLS)
	Table: Annual Averages, All establishment sizes
Housing Tenure & Vacancy (County & State)	Social Explorer ACS 5-Year Estimates
	Table: (SE:A10060) Tenure
Cost-burdened Households (County & State)	Social Explorer ACS 5-Year Estimates
	Table: (SE:A10049, SE:A10051) Selected Monthly Owner Costs, (SE:A18002) Gross Rent as a % of Household Income
Average Commuting Time (County & State)	Social Explorer ACS 5-Year Estimates
	Table: (SE:A09003) Average Commute to Work (In Min)
Transportation Mode (County & State)	Social Explorer ACS 5-Year Estimates
	Table: (A09005) Means of Transportation to Work for Workers 16 Years and Over
Inflows/Outflows of residents (County)	US Census Bureau OnTheMap
	https://onthemap.ces.census.gov/ 5



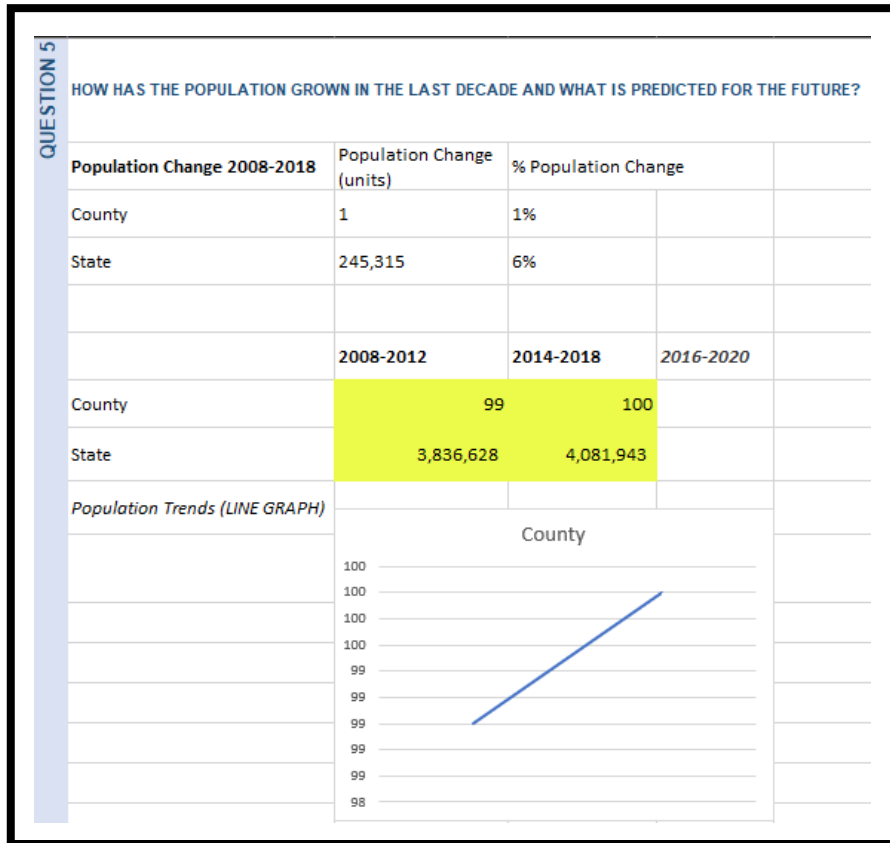
“8 Questions” Excel Data Template – Update Guide

QUESTION 5

Update each **data point** using the sources listed.

Question: How has the population grown in the last decade and what is predicted for the next 30 years?

Populations in decline signal a weaker (less resilient) economy. People often move to seek better employment or housing opportunities. A declining population is indicative of changing development/settlement patterns and loss of potential workforce.



Historical Population Changes (County & State)	Social Explorer ACS 5-Year Estimates (prior 3 periods)
	Table: (SE:A00001) Total Population
30-Year Forecasts (County & State)	PSU Population Research Center Current Forecast Summaries for All Areas
	https://www.pdx.edu/population-research/population-forecasts

“8 Questions” Excel Data Template – Update Guide

QUESTION 6

Update each **data point** using the sources listed.

Question: Are residential homes able to withstand a natural hazard or weather incident?

Newer homes are more likely to have been constructed to withstand natural hazards and weather incidents. Older homes and manufactured homes may be more vulnerable to damages and/or more difficult to repair. Homes without plumbing, electricity or phone services are at a greater risk during an emergency. The capacity to recover quickly from a shock is greater when people, and the workforce, are not displaced.

QUESTION 6	ARE RESIDENTIAL HOMES ABLE TO WITHSTAND A NATURAL HAZARD OR WEATHER INCIDENT?			
	Year Structure Built	COUNTY	%	STATE %
	Occupied Housing Units:	50,000		1,591,835
	Built 2014 or Later	676	1.35%	27,583 1.73%
	Built 2010 to 2013	767	1.53%	36,994 2.32%
	Built 2010 or Later	878	1.76%	64,577 4.06%
	Built 2000 to 2009	989	1.98%	229,363 14.41%
	Built 1990 to 1999	1,212	2.42%	270,341 16.98%
	Built 1980 to 1989	1,232	2.46%	174,293 10.95%
	Built 1970 to 1979	2,343	4.69%	309,945 19.47%
	Built 1960 to 1969	1,001	2.00%	149,747 9.41%
	Built 1950 to 1959	1,002	2.00%	130,588 8.20%
	Built 1940 to 1949	2,002	4.00%	83,509 5.25%
	Built 1939 or Earlier	2,003	4.01%	179,472 11.27%
	Built 2010 or Later	3,003	6.01%	64,577 4.06%
	Built Before 1970	3,004	6.01%	543,316 34.13%

Housing Age (County & State)	Social Explorer ACS 5-Year Estimates
	Table: (SE:A10055) Occupied Housing Units by Year Structure Built
Mobile Homes (County & State)	Social Explorer ACS 5-Year Estimates
	Table: (SE:A10032) Housing Units in Structure
Residential Facilities (County & State)	Social Explorer ACS 5-Year Estimates
	Tables: (SE:A10029) Housing Units by Telephone Service Available, (SE:A10034) House Heating Fuel
	US Census Bureau ACS 5-Year Estimates
	Tables: (B25047) Plumbing Facilities for All Housing Units (B25051) Kitchen Facilities for All Housing Units
Home Heating Choices (County & State)	Social Explorer ACS 5-Year Estimates
	Table: (SE:A10034) House Heating Fuel



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QUESTION 7

Update each **data point** using the sources listed.

Question: What level of education attainment and earnings are residents reaching?

People who attain higher education and/or have specialized skills are more likely to be employed and earn higher wages and less likely to primarily depend on public services. Regions that have educational facilities can provide essential resources and training for local residents preparing to join the workforce. In addition, if economic conditions change and the local employment sectors shift, educational facilities can be a valuable asset for the community by offering community members new or additional training.

QUESTION 7	WHAT LEVEL OF EDUCATION ATTAINMENT AND EARNINGS ARE RESIDENTS REACHING?				
	Educational Attainment	COUNTY	%	STATE	%
	Population 25 Years and Over:	50,000		2,850,693	
	Less than High School	676	0.00%	274,182	9.60%
	High School Graduate (Includes Equivalency)	767	0.00%	656,365	23.00%
	Some College	878	0.00%	982,329	34.50%
	Bachelor's Degree	989	0.00%	583,144	20.50%
	Master's Degree	1,212	0.00%	247,490	8.70%
	Professional School Degree	1,232	0.00%	62,012	2.20%
	Doctorate Degree	2,343	0.00%	45,171	1.60%
	Bachelor's Degree or higher	5,776	0.00%	937,817	33%
	Median Earnings by Educational Attainment	COUNTY	% of State Stats	STATE	

Educational Attainment (County & State)	Social Explorer ACS 5-Year Estimates
	Table: (SE:A12001) Educational Attainment for Population 25 Years and Over
Median Earnings by Educational Attainment (County & State)	Social Explorer ACS 5-Year Estimates
	Table: (SE:A15001) Median Earnings by Sex by Educational Attainment (In Inflation Adjusted Dollars) (For Population Age 25+)
Access to Education and Training Institutions	GIS Prepared by OCWCOG By Request
	Public and Private Education Location Data

"8 Questions" Excel Data Template – Update Guide

QUESTION 8

Update each **data point** using the sources listed.

Question: Do residents have access to health and wellness facilities?

A resilient economy can consistently provide residents with basic needs, including shelter, safety, and food. Hospitals, clinics, and grocery stores are vital for preparing for, responding to, and recovering from a major disruption. High levels of baseline community health are important for resilience because communities with healthy residents are better able to absorb the impacts of, and recover from, disasters. Health insurance coverage is a positive indicator of community resilience.

QUESTION 8 DO RESIDENTS HAVE ACCESS TO HEALTH AND WELLNESS FACILITIES?				
Insurance Coverage	COUNTY	%	STATE	%
Total Population in Survey	47,515		4,042,073	
No Health Insurance Coverage	500	0.0%	293,690	7.3%
With Health Insurance Coverage:	500	0.0%	3,748,383	92.7%
Public Health Coverage	250	0.0%	1,586,088	39.2%
Private Health Insurance	250	0.0%	2,728,149	67.5%

Access to Health Services	GIS Prepared by OCWCOG By Request
	<i>Custom inventory of local data must be provided.</i>
Insurance Coverage (County & State & National)	Social Explorer ACS 5-Year Estimates
	Table: (SE:A20001) Health Insurance

C. County Profiles





Benton County

Economic Resilience Profile



ECONOMIC
RESILIENCE

BENTON COUNTY

Benton County is located in Oregon’s Willamette Valley. The largest cities within the county are Corvallis (County Seat), Albany, and Philomath. Benton County residents are more educated than the general state population, and younger, which contributes to a strong local workforce. Benton County is home to Oregon State University. The local economy was traditionally driven by agriculture and is now led by the Health Care sector.

Quick Facts

Population
Population as % of State Total

94,665
2%

Economic Diversity Score
(Hachman Index)

0.641 (/1.0) 7th Highest of 36 Oregon Counties

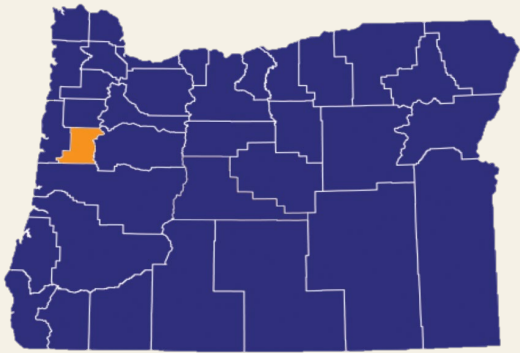
Top 3 Industries by employment
and Average Wages

#1	16.1%	#2	10.0%	#3	9.8%
Health Care & Social Assistance		Accommodation and Food Services		Retail Trade	
\$59,203		\$17,647		\$26,891	
\$52,192					
Average Annual Wages in Benton County (all industries/ownerships)					

Stronger Signals of Resilience



- Benton County’s educated and younger workforce is a positive indicator of economic resilience
- The housing inventory in Benton County includes a more diverse mix of housing types and newer construction than other parts of Oregon, contributing to a more resilient economy



Weaker Signals of Resilience

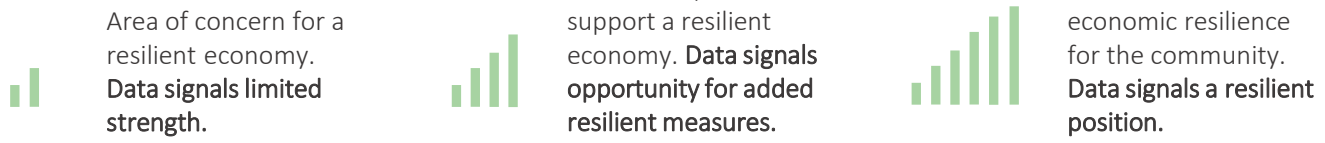


- Benton County has a high concentration of jobs in the Accommodation and Food Services industries, which pay lower-wages and may be less stable sources of employment during a major event
- Higher-wage industries in Benton County are shrinking, while lower-wage employment opportunities are growing

	US	State	County
Median Household Income (2018 \$)	\$60,293	\$59,393	\$58,655
Median Age	37.9	39.2	32.9
% of Residents with at least High School Degree	87.6%	90.5%	95.5%
% of Renters spending 30% or more of income on housing	47%	49%	54%

City	Population
Corvallis UGB	59,730
Outside UGBs	19,300
Albany UGB (Benton)	8,300
Philomath	5,370
Adair Village	1,325
Monroe	690

Gauging Resilience: Signal Strength Measures



This profile measures resilience in the County using the data detailed in the **8 Questions Framework Introduction**. Some data help answer more than one question, and most questions are answered using a combination of datasets. Measuring economic resilience is challenging because many factors impact a community’s ability to recover from a shock. The elements that contribute to a more resilient community are varied, and often independently managed. It is entirely possible for a community to demonstrate economic strengths and vulnerabilities at the same time.




This framework measures the “signal strength” associated with each dataset. Within every question, the datasets with the weaker signals should be noted and further investigated. Communities should aim to have full-power resilience signals for most datasets and may want to concentrate efforts where there is limited signal strength.

Terms Used in Measuring Resilience




Term	Defined as
Age Dependency Ratio	Determined by measuring the number of dependents (young and old) in a population divided by the number of working-age people. This data point describes the level of pressure on an economy from supporting populations that are typically less active in the labor market.
Average Wages	Average of the wages earned in a particular job or industry occupation. Wages include tips, commissions, bonuses, vacation, and holiday pay, but do not include benefits.
Complete Kitchen / Complete Plumbing	Homes that have a sink with faucet, a stove or range, and a refrigerator meet the criteria for having complete kitchen facilities. Homes that have hot and cold running water, a flush toilet and a bathtub or shower meet the criteria for having complete plumbing facilities.
Cost-burdened / Severe cost-burdened Households	Households that pay more than 30% of their income for housing are considered cost-burdened. Households that pay more than 50% of their income for housing are considered severely cost-burdened.
Fastest Growing Industries (& wages)	Private industries with the highest percentage of total employment, as measured by Oregon Employment Department (OED).
Jobs to Homes Ratio	Used to examine the proportions of residents, jobs, and services in urban areas. The ratio is measured by dividing the total employment by total occupied housing units.
Median Household Income	Median of households’ income earned in the past 12 months within a geography. Income includes the income of the householder and all other individuals 15 years and over in the household (whether or not they are related to householder).
Population Growth Rate	This rate expresses the percent change in population over a given time period.
Vacancy Rate	The proportion of housing units that are not seasonal or for sale that are not occupied.

What Indicates Resilience?		
1	Does the economy have diverse and well-paid jobs?	<p>Diversified economies are more resilient.</p> <ul style="list-style-type: none">+ A distribution of jobs in higher-wage industries indicates more economic resilience■ A concentration of jobs in a single industry indicates less economic resilience
2	What is the projected future of major employment industries in the region and nationally?	<p>Industries that are less subject to volatility are more resilient.</p> <ul style="list-style-type: none">+ A distribution of employment across industries that will likely remain stable indicates greater economic resilience■ A concentration of employment in industries that are regulated, taxed, or that rely on natural resources introduces more risk for economic resilience
3	What is the age breakdown of residents?	<p>A mix of young, working, and older populations is indicative of a more resilient economy.</p> <ul style="list-style-type: none">+ Populations that are active in the labor force promote economic resilience■ An aging population threatens economic resilience
4	Do people live and work in the community?	<p>In communities where people live and work, the local economy is more active and independent, and therefore more resilient.</p> <ul style="list-style-type: none">+ Mix of housing types and costs indicates greater economic resilience■ Limited affordable housing options and major commuter outflows indicates less economic resilience
5	How has the population grown in the last decade and what is predicted for the next 30 years?	<p>Growing populations indicate economic opportunities and resilience.</p> <ul style="list-style-type: none">+ Steady and continuous growth indicates greater economic resilience■ Sharp inclines and declines in populations indicate less economic resilience
6	Are residential homes able to withstand a natural hazard or weather incident?	<p>Newer homes are more likely to have been constructed to withstand natural hazards and weather incidents. Older homes and manufactured homes may be more vulnerable to damages and/or more difficult to repair.</p> <ul style="list-style-type: none">+ A sufficient supply of newer housing stock (built after 1970) indicates economic resilience■ Limited newer housing stock and a decline in homebuilding over the last decade indicates less economic resilience
7	What level of education attainment and earnings are residents reaching?	<p>Residents with advanced or specialized degrees have higher earning potential. Regions that have choices for advanced education (trade schools, community colleges, four-year colleges, and universities) are better positioned to support the training of local residents.</p> <ul style="list-style-type: none">+ Higher percentage of residents with advanced or specialized degrees indicates greater economic resilience■ Lower percentage of residents with advanced or specialized degrees indicates less economic resilience
8	Do residents have access to health and wellness facilities?	<p>Communities with health and wellness facilities are more resilient than communities that lack these facilities. People with health insurance contribute to a more resilient economy by reserving scarce public health resources for those most in need.</p> <ul style="list-style-type: none">+ Populations that are mostly insured and mostly located near health care facilities indicates greater economic resilience■ Populations that have lower insurance rates and that are located farther from health care facilities indicates less economic resilience

1. Does the economy have diverse and well-paid jobs?

Data to Answer the Question				Results
Employment Data	Resilient economies are not predominated by low-wage industries. Average Annual Wages 2018 Oregon \$53,053 Benton County \$52,192			
Source: QCEW + Oregon Employment Department (OED)	Industry with Highest Employment	Wages	% of Total Emp.	
	1. Healthcare & Social Asst.	\$59,203	16%	
	2. Accommodation & Food Services	\$17,647	10%	
	3. Retail Trade	\$26,891	10%	
Hachman Index	The Hachman Index is a measure of economic diversity.			
Source: Oregon Employment Department (OED)	Benton County 0.641 7 th highest of Oregon’s Counties (2019)			
Income Earned	Do people earn an equivalent income in Benton County compared to other parts of the state?			
	<u>Median Household Income</u> <u>% of State Median Household Income</u>			
	Benton County	\$58,655	98.8%	
	Oregon	\$59,393		
	Lane County	\$49,958	84.1%	
	Lincoln County	\$46,061	77.6%	
	Linn County	\$52,097	87.7%	
Source: ACS (2018)				



People with jobs in the top industry, Heath Care and Social Assistance, are earning more than the County’s median wage, and nearly the same income as people who work in this industry in other parts of Oregon. In comparison, people who work in the 2nd largest industry, Accommodation and Food Services, are earning less than \$18,000 annually, more than 70% less than the state’s median income. Each of the top three industries account for less than 20% of the total employment, meaning that there is employment diversity and less vulnerability from an industry-specific disruption.




Data Definitions & Thresholds				
Employment Data	Of the 3 fastest growing industries, how many account for 20% or more of total area employment?	3	1-2	0
Economic Diversity	The Hachman Index is a measure of economic diversity. Using indicators such as gross domestic product (GDP) or employment, the index measures the mix of industries present in a particular region relative to a (well-diversified) reference region.	0-0.33	0.34-0.66	0.67-1.0
Income Earned	Median household income in the County as a percentage of state median income.	Less than 60%	60%-80%	More than 80%

2.

What is the projected future of major employment industries in the region and nationally?

Diversified economies are more resilient. Regions that have a concentration of jobs in fewer industries are less resilient.

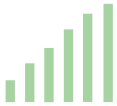

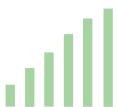
Data to Answer the Question		Results
<div>Employment Data</div> <div>Source: QCEW</div>	<div>From 2010-2019, Benton County has seen a decrease in higher-wage jobs in sectors like Information and federal government. In the same period, more than 25% of the County’s job growth has occurred in the leisure and hospitality industry, which supports lower-wage jobs. The average Leisure and Hospitality wages in Benton County (\$17,464) is significantly lower than the county and state median household incomes.</div> <div><div><div>Fastest Growing</div><div>1. Health care and social assistance</div><div>2. Mining, logging, and construction</div><div>3. Leisure and Hospitality</div></div><div><div>Wages</div><div>\$58,690</div><div>\$N/A</div><div>\$17,464</div></div></div>	
<div>Current Events and National Trends</div> <div>Source: Various</div>	<div>In Benton County, the employment sectors are diverse, but there is economic vulnerability when job growth is aligned with lower-wage industries.</div>	




Data Definitions & Thresholds				
Employment Data	Of the 3 fastest growing industries, how many offer wages above, or equivalent to, average wages in the county?	0	1-2	3
Current Events and National Trends	Articles that discuss growing and shrinking industries in Oregon may offer insights into potential economic and employment related risk.	News and Trends suggest industries will not prosper in the future	Nothing Noteworthy	News and Trends suggest industries are growing (regionally, nationally, globally)

3.

What is the age breakdown of residents?

Communities that are resilient have a mix of younger and older populations, and a growing number of working-age residents. Higher concentrations of older or younger populations require more services from the public, particularly during an economic disruption.

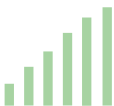

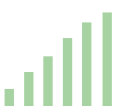
Data to Answer the Question		Results
Population characteristics Source: ACS (2018)	The median age of Benton County residents is 32.9, lower than the state (39.2) and national (37.2) averages. The age breakdown in Benton County skews younger, with 23% of the population between the ages of 18-24.	
Workers over 55 stats Source: OED	25% of Benton County's total population are over 55 years old and currently working (compared to 23% at the state level).	
Age dependency ratio Source: ACS (2018)	The age dependency ratio for Benton County is 46.8, suggesting less economic pressure compared to the State's ratio of 60.6.	




Data Definitions & Thresholds				
Population characteristics	Median Age	Over 50	40-50	Under 40
Workers over 55 stats	Percentage of population of people over 55 and employed full-time When the workforce is relying on an aging population it may be less sustainable.	More than 30%	15%-30%	Less than 15%
Age dependency ratio	The dependency ratio is the number of dependents in a population (under-18 and over-65) divided by the number of working-age (18-64) people, multiplied by 100. This data point describes the level of pressure on an economy from supporting the portions of the population least likely to be working.	More than 65.0	50.0-65.0	Less than 50.0

4.

Do people live and work in the community?

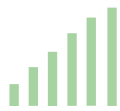
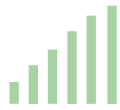
If people live close to where they work, productive time is not wasted on commuting and employment is more accessible during infrastructure disruptions. Communities that provide housing and employment options to residents of all income-levels are more resilient during a shock to the economic landscape.




Data to Answer the Question		Results
Housing Data Source: ACS (2018)	The housing inventory in Benton County includes a mix of single-family, multi-unit, and mobile homes. About 60% of housing inventory is single-family and 30% is multi-unit, 6% mobile homes, signaling a more diverse housing stock than the state averages. The vacancy rate in Benton County is 3%, a bit higher than at the state level.	
Cost of Living vs Median Household Income Source: ACS (2018)	In Benton County, 55% of residents who rent and 35% of all residents are cost-burdened. In comparison, almost 50% of renters and 34% of all residents in the state are cost-burdened.	
Commuting Patterns Source: ACS (2018), On the Map (2019)	In Benton County, 50% of people live and work within the county; fewer people drive to work than the state average, and more people walk and bicycle than state average (16% v. 6%). The average commute time is 19 minutes.	

Data Definitions & Thresholds				
Housing and Employment Data	Jobs to Homes Ratio	Less than 0.75	More than 1.5	0.75-1.5
Cost of Living	Vacancy Rate	Less than 2.25%, More than 7%	2.25%-4.49%	4.5%-7%
	Percentage of households spending more than 30% of their income on housing (known as cost-burdened)	More than 25%	20-25%	Less than 20%
Commuting Patterns	Average commuting time	More than 26 min	20 min - 26 min	Less than 20 min
	Percentage of population that commute via walking, bicycling, or public transportation	Less than 5%	5%-10%	More than 10%
	Percentage of population that live and work in the county.	Less than 50%	50-75%	More than 75%

5. How has the population grown in the last decade and what is predicted for the next 30 years?

Populations in decline signal a weaker (less resilient) economy. People often move to seek better employment or housing opportunities. A declining population is indicative of changing development/ settlement patterns and loss of potential workforce.


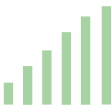
Data to Answer the Question		Results
Population Growth Rate Source: ACS (2018)	Benton County accounts for 2% of the state’s population and has increased by 5% between 2008-2018. This increase in population is fairly consistent, although slightly lower, than the state’s population growth over the same time period (6.4%).	
Population Forecasts Source: PSU	Benton County’s total population is forecasted to increase by 1.0% (2017-2035) and 0.4% (2035-2067), or nearly 18,000 over the next 18 years (2017-2035) and by more than 33,000 over the entire 50-year forecast period (2017-2067).	




Data Definitions & Thresholds				
Past Population Data	Percentage change in population in the past 10 years	Less than 1.5%	1.5-3%	More than 3%
Population Forecasts	Forecasts for population trends and net migration over the next 30 years relate to the economic drivers that attract and/or retain a growing population.	Declining	No significant Growth or Decline	Growing

6.

Are residential homes able to withstand a natural hazard or weather incident?

Newer homes are more likely to have been constructed to withstand natural hazards and weather incidents. Older homes and manufactured homes may be more vulnerable to damages and/or more difficult to repair. Homes without plumbing, electricity or phone services are at a greater risk during an emergency. The capacity to recover quickly from a shock is greater when people (the workforce) are not displaced.

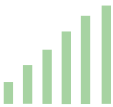
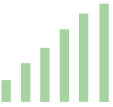
Data to Answer the Question		Results
Housing Data Source: QCEW	About 5% of the houses in Benton County were built in 2010 or later. In the period following the last economic recession, Benton County saw a decline in housing construction, but notably, was less affected than the state and other CWEDD counties, on average. Mobile homes make up a slightly smaller portion of the housing stock than the state average (6% v. 9%).	
Utility & Services Source: Oregon Employment Department (OED)	The split of residents who use gas and electricity for heating fuel is comparable to the state figures (approximately 40% gas, 50% electricity). 3% of housing or less lack of plumbing, kitchen, or telephone services.	




Data Definitions & Thresholds				
Housing Data	Percentage of homes built in the last decade	Less than 4%	4-15%	More than 15%
	Percentage of homes built before 1970	More than 60%	40%-60%	Less than 40%
	Percentage of housing stock that is classified as mobile homes	More than 10%	5-10%	Less than 5%
Utility & Services	Percentage of homes without complete plumbing	More than 2%	1-2%	Less than 1%
	Percentage of homes without complete kitchens	More than 3%	1-3%	Less than 1%
	Percentage of homes dependent on any single fuel supply	More than 70%	60-70%	Less than 60%

7.

What level of educational attainment and earnings are residents reaching?

People who attain higher education and/or have specialized skills are more likely to be employed and earn higher wages and less likely to primarily depend on public services. Regions that have educational opportunities can provide essential resources and training for local residents preparing to join the workforce. In addition, if economic conditions change and the local employment sectors shift, educational opportunities can be an asset for the community by offering community members new or additional training.

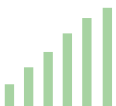
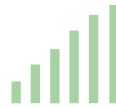
Data to Answer the Question		Results
Local resources for training and education Source: OCWCOG	Oregon State University is a public research institute that offers undergraduate, graduate, and PhD degrees. The University attracts 32,000 students and is an economic driver in Corvallis. The Community Services Consortium serves Benton, Linn, and Lincoln Counties, as a resource for local job seekers and business owners offering a variety of programs and services.	
Educational attainment of populations Source: ACS (2018)	<p>More than 95% of people in Benton County have attained a minimum of a high-school degree, and more than 50% of people have earned a bachelor's degree or higher. In Benton County, a greater proportion of residents have attained higher-education than the state averages.</p> <p>People with only a high-school degree in Benton County have median earnings that are 95% of the state median for those with only a high school degree.</p>	




Data Definitions & Thresholds				
Educational attainment and earnings	Percentage of population (25 years+) with Bachelor's Degree or higher	Less than 25%	25%-35%	More than 35%
	Median earnings of high school graduates (or equivalency) in the county as a percentage of median earnings of high school graduates in state	Less than 75%	75%-105%	More than 105%

8.

Do residents have access to health and wellness facilities?

A resilient economy can consistently provide residents with basic needs, including shelter, safety, and food. Hospitals, clinics, and grocery stores are vital for preparing for, responding to, and recovering from a major disruption. High levels of baseline community health are important for resilience because communities with healthy residents are better able to absorb the impacts of, and recover from, disasters. Health insurance coverage is a positive indicator of community resilience.

Data to Answer the Question		Results
Hospital, urgent care, and pharmacy coverage Source: OCWCOG & LCOG	Health services are concentrated in Corvallis and limited in smaller communities, but most residents are within at least 15 miles of a medical facility.	
Insurance Coverage Source: ACS (2018)	Just over 5% of Benton County residents are uninsured, a lower rate than the State (7%) and a positive indicator for local economic resilience.	

Data Definitions & Thresholds				
Hospital, urgent care, and pharmacy coverage	Percentage of population within 15 miles of a medical facility (hospital, urgent care, clinic)	Less than 40%	40-70%	More than 70%
Insurance Coverage	Percentage of uninsured (non-incarcerated) population	More than 11%	7-11%	Less than 7%



Lane County

Economic Resilience Profile

ECONOMIC
RESILIENCE

LANE COUNTY

Lane County is located in Oregon’s Willamette Valley. The largest cities within the county are Eugene (County Seat), Springfield, Cottage Grove, and Florence. The local economy has shifted from timber and agriculture towards service-oriented industries. Lane County is home to the University of Oregon, and Northwest Christian University, attracting students and talent to the region.

Quick Facts

Population
Population as % of State Total

381,365
9%

Economic Diversity Score
(Hachman Index)

0.861 (/1.0) Highest of 36 Oregon Counties

Top 3 Industries by employment
and Average Wages

#1 16.5%
Health Care &
Social Assistance
\$48,953

#2 13.0%
Accommodation
and Food Services
\$17,647

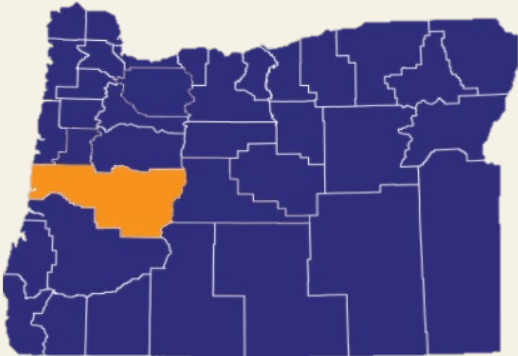
#3 9.9%
Retail Trade
\$26,891

\$43,783
Average Annual Wages in Lane County
(all industries/ownerships)

Stronger Signals of Resilience



- Lane County’s educated workforce is a positive indicator of economic resilience
- Job growth is across diverse industries and wages are competitive in comparison to the state
- An established network of education, training and employment resources and services exists



Weaker Signals of Resilience



- Higher wage industries are shrinking and lower wage industries that require a less educated workforce are growing
- The housing inventory in Lane County is prominently older and home values are more than 30% lower than the state average. The cost of living and limited availability of housing in the region are negative signals for economic resilience.

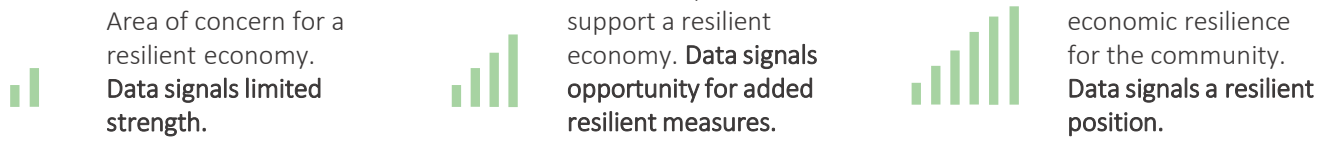
	US	State	County
Median Household Income	\$60,293	\$59,393	\$49,958
Median Age	37.9	39.2	39.4
% of Residents with at least High School Degree	87.6%	90.5%	91.5%
% of Renters spending 30% or more of income on housing	47%	49%	53%

Source: US Census 5-year ACS 2018

City	Population
Eugene & Springfield	266,806
Florence	10,912
Cottage Grove	10,645
Florence	10,912
Junction City	6,821
Creswell	6,041
Veneta	4,906
Oakridge	3,998

Source: PSU 2020

Gauging Resilience: Signal Strength Measures



This profile measures resilience in the County using the data detailed in the **8 Questions Framework Introduction**. Some data help answer more than one question, and most questions are answered using a combination of datasets. Measuring economic resilience is challenging because many factors impact a community’s ability to recover from a shock. The elements that contribute to a more resilient community are varied, and often independently managed. It is entirely possible for a community to demonstrate economic strengths and vulnerabilities at the same time.

This framework measures the “signal strength” associated with each dataset. Within every question, the datasets with the weaker signals should be noted and further investigated. Communities should aim to have full-power resilience signals for most datasets and may want to concentrate efforts where there is limited signal strength.

Terms Used in Measuring Resilience

Term	Defined as
Age Dependency Ratio	Determined by measuring the number of dependents (young and old) in a population divided by the number of working-age people. This data point describes the level of pressure on an economy from supporting populations that are typically less active in the labor market.
Average Wages	Average of the wages earned in a particular job or industry occupation. Wages include tips, commissions, bonuses, vacation, and holiday pay, but do not include benefits.
Complete Kitchen / Complete Plumbing	Homes that have a sink with faucet, a stove or range, and a refrigerator meet the criteria for having complete kitchen facilities. Homes that have hot and cold running water, a flush toilet and a bathtub or shower meet the criteria for having complete plumbing facilities.
Cost-burdened / Severe cost-burdened Households	Households that pay more than 30% of their income for housing are considered cost-burdened. Households that pay more than 50% of their income for housing are considered severely cost-burdened.
Fastest Growing Industries (& wages)	Private industries with the highest percentage of total employment, as measured by Oregon Employment Department (OED).
Jobs to Homes Ratio	Used to examine the proportions of residents, jobs, and services in urban areas. The ratio is measured by dividing the total employment by total occupied housing units.
Median Household Income	Median of households’ income earned in the past 12 months within a geography. Income includes the income of the householder and all other individuals 15 years and over in the household (whether or not they are related to householder).
Population Growth Rate	This rate expresses the percent change in population over a given time period.
Vacancy Rate	The proportion of housing units that are not seasonal or for sale that are not occupied.

What Indicates Resilience?		
1	Does the economy have diverse and well-paid jobs?	<p>Diversified economies are more resilient.</p> <ul style="list-style-type: none">+ A distribution of jobs in higher-wage industries indicates more economic resilience■ A concentration of jobs in a single industry indicates less economic resilience
2	What is the projected future of major employment industries in the region and nationally?	<p>Industries that are less subject to volatility are more resilient.</p> <ul style="list-style-type: none">+ A distribution of employment across industries that will likely remain stable indicates greater economic resilience■ A concentration of employment in industries that are regulated, taxed, or that rely on natural resources introduces more risk for economic resilience
3	What is the age breakdown of residents?	<p>A mix of young, working, and older populations is indicative of a more resilient economy.</p> <ul style="list-style-type: none">+ Populations that are active in the labor force promote economic resilience■ An aging population threatens economic resilience
4	Do people live and work in the community?	<p>In communities where people live and work, the local economy is more active and independent, and therefore more resilient.</p> <ul style="list-style-type: none">+ Mix of housing types and costs indicates greater economic resilience■ Limited affordable housing options and major commuter outflows indicates less economic resilience
5	How has the population grown in the last decade and what is predicted for the next 30 years?	<p>Growing populations indicate economic opportunities and resilience.</p> <ul style="list-style-type: none">+ Steady and continuous growth indicates greater economic resilience■ Sharp inclines and declines in populations indicate less economic resilience
6	Are residential homes able to withstand a natural hazard or weather incident?	<p>Newer homes are more likely to have been constructed to withstand natural hazards and weather incidents. Older homes and manufactured homes may be more vulnerable to damages and/or more difficult to repair.</p> <ul style="list-style-type: none">+ A sufficient supply of newer housing stock (built after 1970) indicates economic resilience■ Limited newer housing stock and a decline in homebuilding over the last decade indicates less economic resilience
7	What level of education attainment and earnings are residents reaching?	<p>Residents with advanced or specialized degrees have higher earning potential. Regions that have choices for advanced education (trade schools, community colleges, four-year colleges, and universities) are better positioned to support the training of local residents.</p> <ul style="list-style-type: none">+ Higher percentage of residents with advanced or specialized degrees indicates greater economic resilience■ Lower percentage of residents with advanced or specialized degrees indicates less economic resilience
8	Do residents have access to health and wellness facilities?	<p>Communities with health and wellness facilities are more resilient than communities that lack these facilities. People with health insurance contribute to a more resilient economy by reserving scarce public health resources for those most in need.</p> <ul style="list-style-type: none">+ Populations that are mostly insured and mostly located near health care facilities indicates greater economic resilience■ Populations that have lower insurance rates and that are located farther from health care facilities indicates less economic resilience

1. Does the economy have diverse and well-paid jobs?

Data to Answer the Question				Results
Employment Data	Resilient economies are not predominated by low-wage industries. Average Annual Wages 2018 Oregon \$53,053 Lane County \$43,783			
Source: QCEW + Oregon Employment Department (OED)	Industry with Highest Employment	Wages	% of Total Emp.	
	1. Healthcare & Social Asst.	\$48,953	17%	
	2. Retail Trade	\$29,899	13%	
	3. Accommodation & Food Services	\$18,635	10%	
Hachman Index	The Hachman Index is a measure of economic diversity.			
Source: Oregon Employment Department (OED)	Lane County 0.861 Highest of Oregon’s Counties (2019)			
Income Earned	Do people earn an equivalent income in Lane County compared to other parts of the state?			
	Median Household Income / % of State Median Household Income			
	Lane County	\$49,958	84.1%	
	Oregon	\$59,393		
	Benton County	\$58,655	98.8%	
	Lincoln County	\$46,061	77.6%	
Source: ACS (2018)	Linn County	\$52,097	87.7%	



The top 3 industries in Lane County pay less, on average, than the state’s median household income. Jobs in Health Care and Social Assistance are projected to grow, and jobs in the higher-paying Information industry are projected to shrink. It is worth noting that Retail Trade accounts for 13% of jobs and that the average earnings for Retail Trade is less than half of the state’s median household income, suggesting that there are a lot of people working in lower paying retail trade jobs. Each of the top three industries account for less than 20% of the total employment, meaning that there is employment diversity and less vulnerability from an industry-specific disruption.




Data Definitions & Thresholds				
Employment Data	Of the 3 fastest growing industries, how many account for 20% or more of total area employment?	3	1-2	0
Economic Diversity	The Hachman Index is a measure of economic diversity. Using indicators such as gross domestic product (GDP) or employment, the index measures the mix of industries present in a particular region relative to a (well-diversified) reference region.	0-0.33	0.34-0.66	0.67-1.0
Income Earned	Median household income in the County as a percentage of state median income.	Less than 60%	60%-80%	More than 80%

2.

What is the projected future of major employment industries in the region and nationally?

Diversified economies are more resilient. Regions that have a concentration of jobs in fewer industries are less resilient.

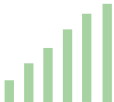


Data to Answer the Question		Results
<div>Employment Data</div> <div>Source: QCEW</div>	<div>From 2010-2019, Lane County has seen a decrease in higher-wage jobs in industries like Information Federal Government and Wood Product Manufacturing. In the same period, 30% of the County’s job growth has occurred in Food & Drink services which provides significantly lower annual wages than the county and state median household incomes. In Lane County, there is diversity in the employment sectors which is a positive indicator of economic resilience. Recent trends in job growth signal a rise in lower-wage industries and fewer higher-wage employment opportunities for Lane County residents.</div> <div><div><div>Fastest Growing</div><div><div>1. Construction</div><div>2. Health care & social assistance</div><div>3. Food services & drinking places</div></div></div><div><div>Wages</div><div><div>\$52,687</div><div>\$48,953</div><div>\$18,233</div></div></div></div>	
<div>Current Events and National Trends</div> <div>Source: Various</div>	<div>In Lane County, the employment sectors are diverse, but there is economic vulnerability when job growth is aligned with lower-wage industries.</div>	




Data Definitions & Thresholds				
Employment Data	Of the 3 fastest growing industries, how many offer wages above, or equivalent to, average wages in the county?	0	1-2	3
Current Events and National Trends	Articles that discuss growing and shrinking industries in Oregon may offer insights into potential economic and employment related risk.	News and Trends suggest industries will not prosper in the future	Nothing Noteworthy	News and Trends suggest industries are growing (regionally, nationally, globally)

3.

What is the age breakdown of residents?

Communities that are resilient have a mix of younger and older populations, and a growing number of working-age residents. Higher concentrations of older or younger populations require more services from the public, particularly during an economic disruption.




Data to Answer the Question		Results
Population characteristics Source: ACS (2018)	The median age of Lane County residents is 39.4, consistent with the state average (39.2). The age breakdown in Lane County is also similar to the state trends, with 18% of the population over the age of 65.	
Workers over 55 stats Source: OED	25% of Lane County's total population are over 55 years old and currently working (compared to 23% at the state level).	
Age dependency ratio Source: ACS (2018)	The age dependency ratio for Lane County is 61.6, close to the state's ratio (60.6), but suggesting some economic pressure.	




Data Definitions & Thresholds				
Population characteristics	Median Age	Over 50	40-50	Under 40
Workers over 55 stats	Percentage of population of people over 55 and employed full-time When the workforce is relying on an aging population it may be less sustainable.	More than 30%	15%-30%	Less than 15%
Age dependency ratio	The dependency ratio is the number of dependents in a population (under-18 and over-65) divided by the number of working-age (18-64) people, multiplied by 100. This data point describes the level of pressure on an economy from supporting the portions of the population least likely to be working.	More than 65.0	50.0-65.0	Less than 50.0

4.

Do people live and work in the community?

If people live close to where they work, productive time is not wasted on commuting and employment is more accessible during infrastructure disruptions. Communities that provide housing and employment options to residents of all income-levels are more resilient during a shock to the economic landscape.

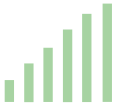
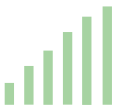
Data to Answer the Question		Results
Housing Data Source: ACS (2018)	The housing inventory in Lane County includes a mix of single-family, multi-unit, and mobile homes. About 67% of housing inventory is single-family, 24% is attached and multi-unit, and 9% mobile homes, similar to the state breakdown. The vacancy rate in Lane County at 2%, about the same as at the state level. Housing costs and availability are of concern.	
Cost of Living vs Median Household Income Source: ACS (2018)	In Lane County, 53% of residents who rent and 38% of all residents are cost-burdened. In comparison, almost 50% of renters and 34% of all residents in the state are cost-burdened, so the situation is somewhat worse in Lane County.	
Commuting Patterns Source: ACS (2018), On the Map (2019)	In Lane County, 77% of people live and work within the county. About the same proportion of people drive to work than the state average (81%), and more people walk and bicycle than state average (9% v. 6%). The average commute time is 19 minutes.	




Data Definitions & Thresholds				
Housing and Employment Data	Jobs to Homes Ratio	Less than 0.75	More than 1.5	0.75-1.5
Cost of Living	Vacancy Rate	Less than 2.25%, More than 7%	2.25%-4.49%	4.5%-7%
	Percentage of households spending more than 30% of their income on housing (known as cost-burdened)	More than 25%	20-25%	Less than 20%
Commuting Patterns	Average commuting time	More than 26 min	20 min - 26 min	Less than 20 min
	Percentage of population that commute via walking, bicycling, or public transportation	Less than 5%	5%-10%	More than 10%
	Percentage of population that live and work in the county.	Less than 50%	50-75%	More than 75%

5.

How has the population grown in the last decade and what is predicted for the next 30 years?

Populations in decline signal a weaker (less resilient) economy. People often move to seek better employment or housing opportunities. A declining population is indicative of changing development/ settlement patterns and loss of potential workforce.



Data to Answer the Question		Results
Population Growth Rate Source: ACS (2018)	Lane County accounts for 9% of the state’s population and has increased by 5% between 2008-2018. This increase in population is fairly consistent, although slightly lower, than the state’s population growth (6.4%). Lane County’s total population grew by about 50% between 1975 and 2014. Following economic and population declines in the 1980’s, the county has experienced consistent population growth, averaging just less than one percent per year.	
Population Forecasts Source: PSU	According to PSU, net in-migration of younger school-age persons and net out-migration of younger to middle-aged individuals will persist throughout the forecast period (2017-2067). Lane County’s total population is forecast to increase by 42% (2017-2067) with the highest growth rate — almost 1% percent per year — occurring in the near-term (2015-2030). Cottage Grove is expected to have the fastest growth rate in Lane County between 2015-2035.	




Data Definitions & Thresholds				
Past Population Data	Percentage change in population in the past 10 years	Less than 1.5%	1.5-3%	More than 3%
Population Forecasts	Forecasts for population trends and net migration over the next 30 years relate to the economic drivers that attract and/or retain a growing population.	Declining	No significant Growth or Decline	Growing

6.

Are residential homes able to withstand a natural hazard or weather incident?

Newer homes are more likely to have been constructed to withstand natural hazards and weather incidents. Older homes and manufactured homes may be more vulnerable to damages and/or more difficult to repair. Homes without plumbing, electricity or phone services are at a greater risk during an emergency. The capacity to recover quickly from a shock is greater when people (the workforce) are not displaced.

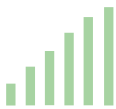

Data to Answer the Question		Results
Housing Data Source: QCEW	37% of housing in Lane County was built before 1970, higher than the state overall (34%). Homes, on average are older in Lane County than they are in Oregon. Only about 4% of the housing in Lane County were built in the last decade. Mobile homes make up about the same portion of the housing stock as the state (8% v. 9%).	
Utility & Services Source: Oregon Employment Department (OED)	Significantly more homes in Lane County use electric heating in comparison to the state (73% v. 50%), and fewer homes use gas in Lane County. Homes that have electric heat are more vulnerable to hazards that result in a loss of electricity. 3% of housing or less lack of plumbing, kitchen, or telephone services.	




Data Definitions & Thresholds				
Housing Data	Percentage of homes built in the last decade	Less than 4%	4-15%	More than 15%
	Percentage of homes built before 1970	More than 60%	40%-60%	Less than 40%
	Percentage of housing stock that is classified as mobile homes	More than 10%	5-10%	Less than 5%
Utility & Services	Percentage of homes without complete plumbing	More than 2%	1-2%	Less than 1%
	Percentage of homes without complete kitchens	More than 3%	1-3%	Less than 1%
	Percentage of homes dependent on any single fuel supply	More than 70%	60-70%	Less than 60%

7.

What level of educational attainment and earnings are residents reaching?

People who attain higher education and/or have specialized skills are more likely to be employed and earn higher wages and less likely to primarily depend on public services. Regions that have educational opportunities can provide essential resources and training for local residents preparing to join the workforce. In addition, if economic conditions change and the local employment sectors shift, educational opportunities can be an asset for the community by offering community members new or additional training.



Data to Answer the Question		Results
Local resources for training and education Source: OCWCOG	Lane County is home to private and public colleges and universities that offer a variety programs and degrees. The University of Oregon and Lane Community College are public educational institutions that together enroll more than 33,000 students each. In addition to education, the Lane County JOBS Program, through Oregon DHS, provides short-term vocational training at no cost for eligible TANF (temporary assistance for needy families) recipients.	
Educational attainment of populations Source: ACS (2018)	92% of people in Lane County have attained a minimum of a high-school degree, and 30% of people have earned a bachelor's degree or higher. In Lane County, a slightly smaller proportion of residents have attained higher-education than the state averages. People with only a high-school degree in Lane County have median earnings that are 93% of the state median for those with only a high school degree.	




Data Definitions & Thresholds				
Educational attainment and earnings	Percentage of population (25 years+) with Bachelor's Degree or higher	Less than 25%	25%-35%	More than 35%
	Median earnings of high school graduates (or equivalency) in the county as a percentage of median earnings of high school graduates in state	Less than 75%	75%-105%	More than 105%

8.

Do residents have access to health and wellness facilities?

A resilient economy can consistently provide residents with basic needs, including shelter, safety, and food. Hospitals, clinics, and grocery stores are vital for preparing for, responding to, and recovering from a major disruption. High levels of baseline community health are important for resilience because communities with healthy residents are better able to absorb the impacts of, and recover from, disasters. Health insurance coverage is a positive indicator of community resilience.

Data to Answer the Question		Results
Hospital, urgent care, and pharmacy coverage Source: OCWCOG & LCOG	Health services are concentrated in Eugene/Springfield and limited in smaller communities. Communities in the eastern part of the county are more than 15 miles from the nearest hospital or urgent care provider.	
Insurance Coverage Source: ACS (2018)	Just under 8% of Lane County residents are uninsured, a slightly higher rate than the State (7%).	

Data Definitions & Thresholds				
Hospital, urgent care, and pharmacy coverage	Percentage of population within 15 miles of a medical facility (hospital, urgent care, clinic)	Less than 40%	40-70%	More than 70%
Insurance Coverage	Percentage of uninsured (non-incarcerated) population	More than 11%	7-11%	Less than 7%



Lincoln County

Economic Resilience Profile

ECONOMIC
RESILIENCE

LINCOLN COUNTY

Lincoln County is located in Oregon’s Willamette Valley. The largest cities within the county are Newport (County Seat), Lincoln City, and Waldport. Lincoln County has a rich fishing history as Newport is one of the 2 major fishing ports in Oregon. The local economy is predominately dependent on tourism and related industries.

Quick Facts

Population
Population as % of State Total

48,305
1%

Economic Diversity Score
(Hachman Index)

0.308 (/1.0) 23rd Highest of 36 Oregon Counties

Top 3 Industries by employment
and Average Wages

#1 24.0%
Accommodation
and Food Services
\$22,861

#2 15.4%
Retail Trade
\$27,526

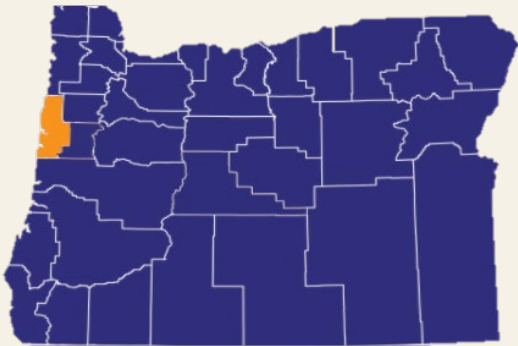
#3 10.7%
Health Care &
Social Assistance
\$27,379

\$38,606
Average Annual Wages in Lincoln County
(all industries/ownerships)

Stronger Signals of Resilience



- Lincoln County is a popular destination for visitors of the Oregon coast.
- Opportunities for economic development in areas of recreation, tourism and hospitality services



Weaker Signals of Resilience



- Lincoln County’s older and less educated workforce indicates some economic resilience risks
- Job growth is modest and concentrated in lower wage industries that cater to tourism and hospitality industries.
- The housing inventory in Lincoln County is prominently older, single family homes, and home values are more than 30% lower than the state average.

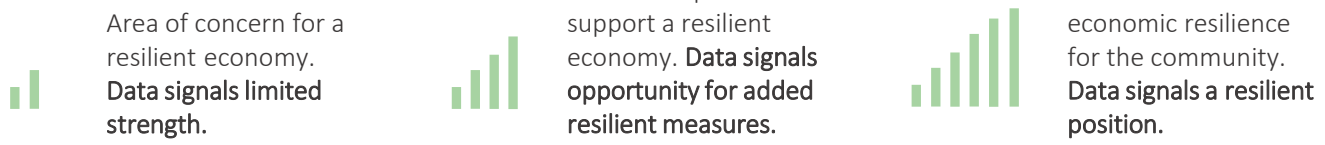
	US	State	County
Median Household Income	\$60,293	\$59,393	\$46,061
Median Age	37.9	39.2	51.3
% of Residents with at least High School Degree	87.6%	90.5%	90.6%
% of Renters spending 30% or more of income on housing	47%	49%	45%

Source: US Census 5-year ACS 2018

City	Population
Newport	10,381
Lincoln City	8,684
Waldport	2,043
Yachats	669

Source: PSU 2020

Gauging Resilience: Signal Strength Measures



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Terms Used in Measuring Resilience




Term	Defined as
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Average Wages	Average of the wages earned in a particular job or industry occupation. Wages include tips, commissions, bonuses, vacation, and holiday pay, but do not include benefits.
Complete Kitchen / Complete Plumbing	Homes that have a sink with faucet, a stove or range, and a refrigerator meet the criteria for having complete kitchen facilities. Homes that have hot and cold running water, a flush toilet and a bathtub or shower meet the criteria for having complete plumbing facilities.
Cost-burdened / Severe cost-burdened Households	Households that pay more than 30% of their income for housing are considered cost-burdened. Households that pay more than 50% of their income for housing are considered severely cost-burdened.
Fastest Growing Industries (& wages)	Private industries with the highest percentage of total employment, as measured by Oregon Employment Department (OED).
Jobs to Homes Ratio	Used to examine the proportions of residents, jobs, and services in urban areas. The ratio is measured by dividing the total employment by total occupied housing units.
Median Household Income	Median of households’ income earned in the past 12 months within a geography. Income includes the income of the householder and all other individuals 15 years and over in the household (whether or not they are related to householder).
Population Growth Rate	This rate expresses the percent change in population over a given time period.
Vacancy Rate	The proportion of housing units that are not seasonal or for sale that are not occupied.

What Indicates Resilience?		
1	Does the economy have diverse and well-paid jobs?	<p>Diversified economies are more resilient.</p> <ul style="list-style-type: none">+ A distribution of jobs in higher-wage industries indicates more economic resilience■ A concentration of jobs in a single industry indicates less economic resilience
2	What is the projected future of major employment industries in the region and nationally?	<p>Industries that are less subject to volatility are more resilient.</p> <ul style="list-style-type: none">+ A distribution of employment across industries that will likely remain stable indicates greater economic resilience■ A concentration of employment in industries that are regulated, taxed, or that rely on natural resources introduces more risk for economic resilience
3	What is the age breakdown of residents?	<p>A mix of young, working, and older populations is indicative of a more resilient economy.</p> <ul style="list-style-type: none">+ Populations that are active in the labor force promote economic resilience■ An aging population threatens economic resilience
4	Do people live and work in the community?	<p>In communities where people live and work, the local economy is more active and independent, and therefore more resilient.</p> <ul style="list-style-type: none">+ Mix of housing types and costs indicates greater economic resilience■ Limited affordable housing options and major commuter outflows indicates less economic resilience
5	How has the population grown in the last decade and what is predicted for the next 30 years?	<p>Growing populations indicate economic opportunities and resilience.</p> <ul style="list-style-type: none">+ Steady and continuous growth indicates greater economic resilience■ Sharp inclines and declines in populations indicate less economic resilience
6	Are residential homes able to withstand a natural hazard or weather incident?	<p>Newer homes are more likely to have been constructed to withstand natural hazards and weather incidents. Older homes and manufactured homes may be more vulnerable to damages and/or more difficult to repair.</p> <ul style="list-style-type: none">+ A sufficient supply of newer housing stock (built after 1970) indicates economic resilience■ Limited newer housing stock and a decline in homebuilding over the last decade indicates less economic resilience
7	What level of education attainment and earnings are residents reaching?	<p>Residents with advanced or specialized degrees have higher earning potential. Regions that have choices for advanced education (trade schools, community colleges, four-year colleges, and universities) are better positioned to support the training of local residents.</p> <ul style="list-style-type: none">+ Higher percentage of residents with advanced or specialized degrees indicates greater economic resilience■ Lower percentage of residents with advanced or specialized degrees indicates less economic resilience
8	Do residents have access to health and wellness facilities?	<p>Communities with health and wellness facilities are more resilient than communities that lack these facilities. People with health insurance contribute to a more resilient economy by reserving scarce public health resources for those most in need.</p> <ul style="list-style-type: none">+ Populations that are mostly insured and mostly located near health care facilities indicates greater economic resilience■ Populations that have lower insurance rates and that are located farther from health care facilities indicates less economic resilience

1. Does the economy have diverse and well-paid jobs?

Data to Answer the Question			Results																
Employment Data Source: QCEW + Oregon Employment Department (OED)	<p>Resilient economies are not predominated by low-wage industries.</p> <p>Average Annual Wages 2018</p> <table><tr><td>Oregon</td><td>\$53,053</td></tr><tr><td>Lincoln County</td><td>\$38,606</td></tr></table> <p>Industry with Highest Employment</p> <table><tr><td></td><td>Wages</td><td>% of Total Emp.</td></tr><tr><td>1. Accommodation & Food Services</td><td>\$22,861</td><td>24%</td></tr><tr><td>2. Retail Trade</td><td>\$27,526</td><td>15%</td></tr><tr><td>3. Healthcare & Social Asst.</td><td>\$51,357</td><td>11%</td></tr></table>		Oregon	\$53,053	Lincoln County	\$38,606		Wages	% of Total Emp.	1. Accommodation & Food Services	\$22,861	24%	2. Retail Trade	\$27,526	15%	3. Healthcare & Social Asst.	\$51,357	11%	
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Hachman Index Source: Oregon Employment Department (OED)	<p>The Hachman Index is a measure of economic diversity.</p> <p>Lincoln County 0.308 23rd highest of Oregon’s Counties (2019)</p>																		
Income Earned Source: ACS (2018)	<p>Do people earn an equivalent income in Lincoln County compared to other parts of the state?</p> <p>Median Household Income / % of State Median Household Income</p> <table><tr><td>Lincoln County</td><td>\$46,061</td><td>77.6%</td></tr><tr><td>Oregon</td><td>\$59,393</td><td></td></tr><tr><td>Benton County</td><td>\$58,655</td><td>98.8%</td></tr><tr><td>Lane County</td><td>\$49,958</td><td>84.1%</td></tr><tr><td>Linn County</td><td>\$52,097</td><td>87.7%</td></tr></table>		Lincoln County	\$46,061	77.6%	Oregon	\$59,393		Benton County	\$58,655	98.8%	Lane County	\$49,958	84.1%	Linn County	\$52,097	87.7%		
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The median household income in Lincoln County is more than 25% less than state data, and employment is concentrated in lower-wage industries related to tourism and hospitality. Accommodation and Food Services account for more than 20% of the total employment in Lincoln County, meaning that there is limited employment diversity and that the employment landscape is more vulnerable to economic disruptions.




Data Definitions & Thresholds				
Employment Data	Of the 3 fastest growing industries, how many account for 20% or more of total area employment?	3	1-2	0
Economic Diversity	The Hachman Index is a measure of economic diversity. Using indicators such as gross domestic product (GDP) or employment, the index measures the mix of industries present in a particular region relative to a (well-diversified) reference region.	0-0.33	0.34-0.66	0.67-1.0
Income Earned	Median household income in the County as a percentage of state median income.	Less than 60%	60%-80%	More than 80%

2.

What is the projected future of major employment industries in the region and nationally?

Diversified economies are more resilient. Regions that have a concentration of jobs in fewer industries are less resilient.




Data to Answer the Question		Results								
Employment Data Source: QCEW	<p>Overall job growth in Lincoln County has outpaced job loss, signaling a stable job market. Lincoln County’s fastest growing industries mostly have higher average wages than the county’s average wage. Accommodation and Food Services is currently the largest job sector in the County and has seen the most job growth between 2010-2019, but does not have particularly high wages.</p> <table><tr><th>Fastest Growing</th><th>Wages</th></tr><tr><td>1. Food Manufacturing</td><td>\$52,687</td></tr><tr><td>2. Food Services & Drinking Places</td><td>\$48,953</td></tr><tr><td>3. Professional & business services</td><td>\$18,233</td></tr></table>	Fastest Growing	Wages	1. Food Manufacturing	\$52,687	2. Food Services & Drinking Places	\$48,953	3. Professional & business services	\$18,233	
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Current Events and National Trends Source: Various	<p>In Lincoln County 24% of the jobs are in Accommodation and Food Services, which can be a vulnerable sector to unexpected closures from natural disasters and pandemics. The wages associated with hospitality and retail industries are not high and are often without benefits. In Lincoln County, nearly 40% of the jobs are in retail, food and beverage. Major disruptions to these industries can have negative impacts on the local tax base, as well as the employees and business owners.</p>									




Data Definitions & Thresholds				
Employment Data	Of the 3 fastest growing industries, how many offer wages above, or equivalent to, average wages in the county?	0	1-2	3
Current Events and National Trends	Articles that discuss growing and shrinking industries in Oregon may offer insights into potential economic and employment related risk.	News and Trends suggest industries will not prosper in the future	Nothing Noteworthy	News and Trends suggest industries are growing (regionally, nationally, globally)

3.

What is the age breakdown of residents?

Communities that are resilient have a mix of younger and older populations, and a growing number of working-age residents. Higher concentrations of older or younger populations require more services from the public, particularly during an economic disruption.




Data to Answer the Question		Results
Population characteristics Source: ACS (2018)	The median age of Lincoln County residents is 51.3, older than the state average (39.2). The age breakdown in Lincoln County skews older, with 27% of the population over the age of 65. The median age went from 44.1 in 2000 to 49.6 in 2010, an increase that is more than double what is observed statewide over the same time frame.	
Workers over 55 stats Source: OED	31% of Lincoln County's total population are over 55 years old and currently working (compared to 23% at the state level).	
Age dependency ratio Source: ACS (2018)	The age dependency ratio for Lincoln County is 81.1, signaling more severe economic pressure, compared to the State's ratio of 60.6.	




Data Definitions & Thresholds				
Population characteristics	Median Age	Over 50	40-50	Under 40
Workers over 55 stats	Percentage of population of people over 55 and employed full-time When the workforce is relying on an aging population it may be less sustainable.	More than 30%	15%-30%	Less than 15%
Age dependency ratio	The dependency ratio is the number of dependents in a population (under-18 and over-65) divided by the number of working-age (18-64) people, multiplied by 100. This data point describes the level of pressure on an economy from supporting the portions of the population least likely to be working.	More than 65.0	50.0-65.0	Less than 50.0

4.

Do people live and work in the community?

If people live close to where they work, productive time is not wasted on commuting and employment is more accessible during infrastructure disruptions. Communities that provide housing and employment options to residents of all income-levels are more resilient during a shock to the economic landscape.

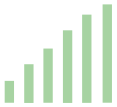

Data to Answer the Question		Results
Housing Data Source: ACS (2018)	The housing inventory in Lincoln County is predominantly single-family, homes (72%). Mobile homes account for 13% of the inventory, while duplexes, triplexes and quads account for less than 6% of the inventory. Limited housing options contribute to a less resilient economy. The vacancy rate in Lincoln County is 3.7%, a bit higher than the state level. Housing costs and availability are of concern, particularly for those looking for something other than a single-family residence.	
Cost of Living vs Median Household Income Source: ACS (2018)	In Lincoln County, 45% of residents who rent and 34% of all residents are cost-burdened. In comparison, almost 50% of renters and 34% of all residents in the state are cost-burdened, so the situation in Lincoln County is slightly better.	
Commuting Patterns Source: ACS (2018), On the Map (2019)	In Lincoln County, 66% of people live and work within the county. A slightly higher proportion of people drive to work than the state average (86% v. 81%), and fewer people walk and bicycle than state average (5% v. 6%). The average commute time is 18 minutes.	



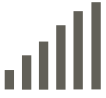
Data Definitions & Thresholds				
Housing and Employment Data	Jobs to Homes Ratio	Less than 0.75	More than 1.5	0.75-1.5
Cost of Living	Vacancy Rate	Less than 2.25%, More than 7%	2.25%-4.49%	4.5%-7%
	Percentage of households spending more than 30% of their income on housing (known as cost-burdened)	More than 25%	20-25%	Less than 20%
Commuting Patterns	Average commuting time	More than 26 min	20 min - 26 min	Less than 20 min
	Percentage of population that commute via walking, bicycling, or public transportation	Less than 5%	5%-10%	More than 10%
	Percentage of population that live and work in the county.	Less than 50%	50-75%	More than 75%

5.

How has the population grown in the last decade and what is predicted for the next 30 years?

Populations in decline signal a weaker (less resilient) economy. People often move to seek better employment or housing opportunities. A declining population is indicative of changing development/ settlement patterns and loss of potential workforce.




Data to Answer the Question		Results
Population Growth Rate Source: ACS (2018)	Lincoln County accounts for 1% of the state’s population and has increased by 4% between 2008-2018, lower than the state’s rate of 6.4%. The county experienced the highest growth rates during the late 1970s, which coincided with a period of relative economic prosperity. During the early 1990s Lincoln’s population growth rates again increased, but challenging economic conditions late in the decade yielded declines in that rate. Still, Lincoln County has recently experienced positive population, averaging less than one half percent per year.	
Population Forecasts Source: PSU	According to PSU, net out-migration of younger persons and net in-migration of middle-aged individuals will persist throughout the forecast period (2017-2067). Lincoln County’s total population is forecast to increase by 27.0% (2017-2067) with the highest growth rate — 0.7 percent per year — occurring in the near-term (2017-2025). Newport and the area outside of the Newport UGB are expected to capture the largest share of population growth.	




Data Definitions & Thresholds				
Past Population Data	Percentage change in population in the past 10 years	Less than 1.5%	1.5-3%	More than 3%
Population Forecasts	Forecasts for population trends and net migration over the next 30 years relate to the economic drivers that attract and/or retain a growing population.	Declining	No significant Growth or Decline	Growing

6.

Are residential homes able to withstand a natural hazard or weather incident?

Newer homes are more likely to have been constructed to withstand natural hazards and weather incidents. Older homes and manufactured homes may be more vulnerable to damages and/or more difficult to repair. Homes without plumbing, electricity or phone services are at a greater risk during an emergency. The capacity to recover quickly from a shock is greater when people (the workforce) are not displaced.



Data to Answer the Question		Results
Housing Data Source: QCEW	About 3% of the houses in Lincoln County were built in 2010 or later. Up until the latest recession, housing was being built in Lincoln County at a steady rate. 31% of housing was built before 1970, a slightly lower proportion than in the state.	
	Mobile homes make up a higher portion of the housing stock than the state average (13% v. 9%).	
Utility & Services Source: Oregon Employment Department (OED)	More homes in Lincoln County use electric heating in comparison to the state (62% v. 50%), and fewer homes use gas in Lincoln County. Homes that have electric heat are more vulnerable to hazards that result in a loss of electricity. 3% of housing or less lack of plumbing, kitchen, or telephone services.	




Data Definitions & Thresholds				
Housing Data	Percentage of homes built in the last decade	Less than 4%	4-15%	More than 15%
	Percentage of homes built before 1970	More than 60%	40%-60%	Less than 40%
	Percentage of housing stock that is classified as mobile homes	More than 10%	5-10%	Less than 5%
Utility & Services	Percentage of homes without complete plumbing	More than 2%	1-2%	Less than 1%
	Percentage of homes without complete kitchens	More than 3%	1-3%	Less than 1%
	Percentage of homes dependent on any single fuel supply	More than 70%	60-70%	Less than 60%

7.

What level of educational attainment and earnings are residents reaching?

People who attain higher education and/or have specialized skills are more likely to be employed and earn higher wages and less likely to primarily depend on public services. Regions that have educational opportunities can provide essential resources and training for local residents preparing to join the workforce. In addition, if economic conditions change and the local employment sectors shift, educational opportunities can be an asset for the community by offering community members new or additional training.

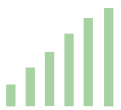

Data to Answer the Question		Results
Local resources for training and education Source: OCWCOG	Lincoln County is home to Oregon Coast Community College which offers technical degrees, certificates and Associate’s degrees in several fields of study, as well as the option to take the first 2-years of courses towards a Bachelor’s Degree. Nearly 1,500 students attend annually. In addition to the community college resources, employment services and training are provided by WorkSource, based in Lincoln City.	
Educational attainment of populations Source: ACS (2018)	90% of people in Lincoln County have attained a minimum of a high-school degree, and 24% of people have earned a bachelor’s degree or higher. In Lincoln County, a smaller proportion of residents have attained higher-education than the state averages. People with only a high-school degree in Lincoln County have median earnings that are 78% of the state median for those with only a high school degree.	




Data Definitions & Thresholds				
Educational attainment and earnings	Percentage of population (25 years+) with Bachelor's Degree or higher	Less than 25%	25%-35%	More than 35%
	Median earnings of high school graduates (or equivalency) in the county as a percentage of median earnings of high school graduates in state	Less than 75%	75%-105%	More than 105%

8.

Do residents have access to health and wellness facilities?

A resilient economy can consistently provide residents with basic needs, including shelter, safety, and food. Hospitals, clinics, and grocery stores are vital for preparing for, responding to, and recovering from a major disruption. High levels of baseline community health are important for resilience because communities with healthy residents are better able to absorb the impacts of, and recover from, disasters. Health insurance coverage is a positive indicator of community resilience.

Data to Answer the Question		Results
Hospital, urgent care, and pharmacy coverage Source: OCWCOG & LCOG	While health care services are concentrated in larger towns, almost everyone in Lincoln County is as least 15 miles from the nearest facility.	
Insurance Coverage Source: ACS (2018)	Just under 8% of Lincoln County residents are uninsured, a slightly higher rate than the State (7%).	

Data Definitions & Thresholds				
Hospital, urgent care, and pharmacy coverage	Percentage of population within 15 miles of a medical facility (hospital, urgent care, clinic)	Less than 40%	40-70%	More than 70%
Insurance Coverage	Percentage of uninsured (non-incarcerated) population	More than 11%	7-11%	Less than 7%



Linn County

Economic Resilience Profile

ECONOMIC
RESILIENCE

LINN COUNTY

Linn County is located in Oregon’s Willamette Valley. The largest cities within the county are Albany (County Seat), Lebanon, and Sweet Home. Linn County has a rich agricultural history and an economy that depends on agriculture and manufacturing.

Quick Facts

Population
Population as % of State Total

127,320
3%

Economic Diversity Score
(Hachman Index)

0.518 (/1.0) 11th Highest of 36 Oregon Counties

Top 3 Industries by employment
and Average Wages

#1 17.5%
Manufacturing
\$63,848

#2 12.4%
Health Care &
Social Assistance
\$44,283

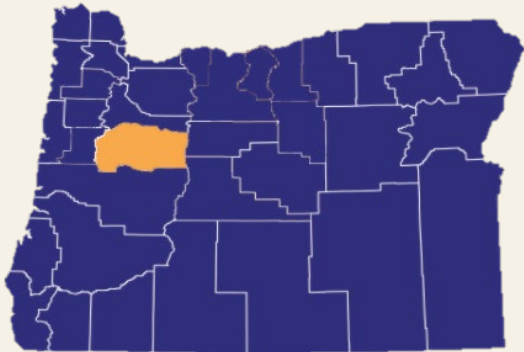
#3 11.2%
Retail Trade
\$27,373

\$43,882
Average Annual Wages in Linn County
(all industries/ownerships)

Stronger Signals of Resilience



- Job growth in Linn County is outpacing job loss, and wages are competitive
- Jobs are concentrated in specialized trades such as construction, wood product manufacturing and primary metal manufacturing industries and depend on local, skilled labor
- Projected population growth supports a growing local economy



Weaker Signals of Resilience

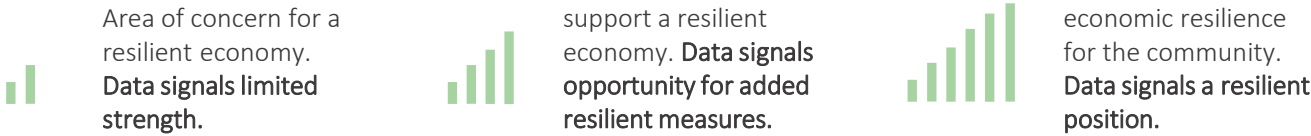


- Linn County’s older and less educated workforce indicates some economic resilience risks related to employment diversity and earned wages
- The age-dependency ratio is higher than state average
- The housing inventory in Linn County is prominently older, single-family homes, signaling a less resilient housing market

	US	State	County
Median Household Income	\$60,293	\$59,393	\$52,097
Median Age	37.9	39.2	39.7
% of Residents with at least High School Degree	87.6%	90.5%	90.0%
% of Renters spending 30% or more of income on housing	47%	49%	49%

City	Population
Albany UGB (Benton)	52,736
Lebanon	16,599
Sweet Home	9,435

Gauging Resilience: Signal Strength Measures



This profile measures resilience in the County using the data detailed in the **8 Questions Framework Introduction**. Some data help answer more than one question, and most questions are answered using a combination of datasets. Measuring economic resilience is challenging because many factors impact a community’s ability to recover from a shock. The elements that contribute to a more resilient community are varied, and often independently managed. It is entirely possible for a community to demonstrate economic strengths and vulnerabilities at the same time.

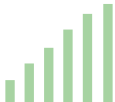

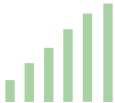
This framework measures the “signal strength” associated with each dataset. Within every question, the datasets with the weaker signals should be noted and further investigated. Communities should aim to have full-power resilience signals for most datasets and may want to concentrate efforts where there is limited signal strength.

Terms Used in Measuring Resilience




Term	Defined as
Age Dependency Ratio	Determined by measuring the number of dependents (young and old) in a population divided by the number of working-age people. This data point describes the level of pressure on an economy from supporting populations that are typically less active in the labor market.
Average Wages	Average of the wages earned in a particular job or industry occupation. Wages include tips, commissions, bonuses, vacation, and holiday pay, but do not include benefits.
Complete Kitchen / Complete Plumbing	Homes that have a sink with faucet, a stove or range, and a refrigerator meet the criteria for having complete kitchen facilities. Homes that have hot and cold running water, a flush toilet and a bathtub or shower meet the criteria for having complete plumbing facilities.
Cost-burdened / Severe cost-burdened Households	Households that pay more than 30% of their income for housing are considered cost-burdened. Households that pay more than 50% of their income for housing are considered severely cost-burdened.
Fastest Growing Industries (& wages)	Private industries with the highest percentage of total employment, as measured by Oregon Employment Department (OED).
Jobs to Homes Ratio	Used to examine the proportions of residents, jobs, and services in urban areas. The ratio is measured by dividing the total employment by total occupied housing units.
Median Household Income	Median of households’ income earned in the past 12 months within a geography. Income includes the income of the householder and all other individuals 15 years and over in the household (whether or not they are related to householder).
Population Growth Rate	This rate expresses the percent change in population over a given time period.
Vacancy Rate	The proportion of housing units that are not seasonal or for sale that are not occupied.

What Indicates Resilience?		
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1. Does the economy have diverse and well-paid jobs?

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Benton County	\$58,655	98.8%																	
Lane County	\$49,958	84.1%																	
Lincoln County	\$46,061	77.6%																	

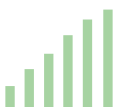

Nearly 30% of the employment in Linn County is attributed to higher wage jobs in the Manufacturing and Health Care and Social Assistance industries. Each of the top three industries account for less than 20% of the total employment, meaning that there is employment diversity and less vulnerability from an industry-specific disruption.



Data Definitions & Thresholds				
Employment Data	Of the 3 fastest growing industries, how many account for 20% or more of total area employment?	3	1-2	0
Economic Diversity	The Hachman Index is a measure of economic diversity. Using indicators such as gross domestic product (GDP) or employment, the index measures the mix of industries present in a particular region relative to a (well-diversified) reference region.	0-0.33	0.34-0.66	0.67-1.0
Income Earned	Median household income in the County as a percentage of state median income.	Less than 60%	60%-80%	More than 80%

2.

What is the projected future of major employment industries in the region and nationally?

Diversified economies are more resilient. Regions that have a concentration of jobs in fewer industries are less resilient.

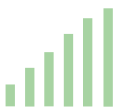


Data to Answer the Question		Results								
Employment Data Source: QCEW	<p>Overall job growth in Linn County has outpaced job loss, with minimal loss of higher-wage industries, signaling a healthy job market. From 2010-2019, the Construction industry dominated job growth in Linn County along with wood product and metal manufacturing industries. Jobs in these industries offer competitive wages to people with a mix of educational attainment levels</p> <table><tr><th>Fastest Growing</th><th>Wages</th></tr><tr><td>1. Construction</td><td>\$55,257</td></tr><tr><td>2. Wood product manufacturing</td><td>\$54,057</td></tr><tr><td>3. Primary metal manufacturing</td><td>\$85,141</td></tr></table>	Fastest Growing	Wages	1. Construction	\$55,257	2. Wood product manufacturing	\$54,057	3. Primary metal manufacturing	\$85,141	
Fastest Growing	Wages									
1. Construction	\$55,257									
2. Wood product manufacturing	\$54,057									
3. Primary metal manufacturing	\$85,141									
Current Events and National Trends Source: Various	<p>In Linn County, the concentration of jobs in manufacturing suggests a competitive advantage in the County that will attract continued growth, but also a potential vulnerability to industry-specific economic downturns.</p>									



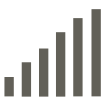
Data Definitions & Thresholds				
Employment Data	Of the 3 fastest growing industries, how many offer wages above, or equivalent to, average wages in the county?	0	1-2	3
Current Events and National Trends	Articles that discuss growing and shrinking industries in Oregon may offer insights into potential economic and employment related risk.	News and Trends suggest industries will not prosper in the future	Nothing Noteworthy	News and Trends suggest industries are growing (regionally, nationally, globally)

3.

What is the age breakdown of residents?

Communities that are resilient have a mix of younger and older populations, and a growing number of working-age residents. Higher concentrations of older or younger populations require more services from the public, particularly during an economic disruption.




Data to Answer the Question		Results
Population characteristics Source: ACS (2018)	The median age of Linn County residents is 39.7, about in line with the state average (39.2). Similarly, about with 18% of the population over the age of 65, compared to 17% statewide. The median age went from 37.4 in 2000 to 39.2 in 2010 and 39.5 in 2015, an increase that is smaller than that observed statewide.	
Workers over 55 stats Source: OED	25% of Lincoln County’s total population are over 55 years old and currently working (compared to 23% at the state level).	
Age dependency ratio Source: ACS (2018)	The age dependency ratio for Linn County is 69.6, suggesting more economic pressure, compared to the State’s ratio of 60.6.	




Data Definitions & Thresholds				
Population characteristics	Median Age	Over 50	40-50	Under 40
Workers over 55 stats	Percentage of population of people over 55 and employed full-time When the workforce is relying on an aging population it may be less sustainable.	More than 30%	15%-30%	Less than 15%
Age dependency ratio	The dependency ratio is the number of dependents in a population (under-18 and over-65) divided by the number of working-age (18-64) people, multiplied by 100. This data point describes the level of pressure on an economy from supporting the portions of the population least likely to be working.	More than 65.0	50.0-65.0	Less than 50.0

4.

Do people live and work in the community?

If people live close to where they work, productive time is not wasted on commuting and employment is more accessible during infrastructure disruptions. Communities that provide housing and employment options to residents of all income-levels are more resilient during a shock to the economic landscape.

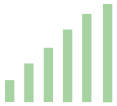
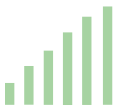
Data to Answer the Question		Results
Housing Data Source: ACS (2018)	The housing inventory in Linn County is predominantly single-family, homes (72%). Mobile homes account for 12% of the inventory, duplexes, triplexes and quads account for about 7% of the inventory. Limited housing options contribute to a less resilient economy. The vacancy rate in Linn County is 2.4%, about the same as the state level.	
Cost of Living vs Median Household Income Source: ACS (2018)	In Linn County, 49% of residents who rent and 34% of all residents are cost-burdened. In comparison, almost 50% of renters and 34% of all residents in the state are cost-burdened, so the situation in Linn County is about the same.	
Commuting Patterns Source: ACS (2018), On the Map (2019)	In Linn County, 53% of people live and work within the county. A higher proportion of people drive to work than the state average (90% v. 81%), and fewer people walk and bicycle than state average (3% v. 6%). The average commute time is 23 minutes.	




Data Definitions & Thresholds				
Housing and Employment Data	Jobs to Homes Ratio	Less than 0.75	More than 1.5	0.75-1.5
Cost of Living	Vacancy Rate	Less than 2.25%, More than 7%	2.25%-4.49%	4.5%-7%
	Percentage of households spending more than 30% of their income on housing (known as cost-burdened)	More than 25%	20-25%	Less than 20%
Commuting Patterns	Average commuting time	More than 26 min	20 min - 26 min	Less than 20 min
	Percentage of population that commute via walking, bicycling, or public transportation	Less than 5%	5%-10%	More than 10%
	Percentage of population that live and work in the county.	Less than 50%	50-75%	More than 75%

5.

How has the population grown in the last decade and what is predicted for the next 30 years?

Populations in decline signal a weaker (less resilient) economy. People often move to seek better employment or housing opportunities. A declining population is indicative of changing development/ settlement patterns and loss of potential workforce.




Data to Answer the Question		Results
Population Growth Rate Source: ACS (2018)	Linn County accounts for 3% of the state’s population and has increased by 5% between 2008-2018. This increase in population is fairly consistent with the state’s population growth (6.4%). Millersburg and Harrisburg posted the highest average annual growth rates at 7.1% and 2.6%, respectively.	
Population Forecasts Source: PSU	According to PSU, net out-migration of younger persons and net in-migration of middle-aged individuals will persist throughout the forecast period (2017-2067). Linn County’s total population is forecast to increase by 48.0% (2017-2067) with the highest growth rate — 1% per year — occurring in the near-term (2017-2025). Albany, Lebanon, and Sweet Home are expected to capture the largest share of population growth.	




Data Definitions & Thresholds				
Past Population Data	Percentage change in population in the past 10 years	Less than 1.5%	1.5-3%	More than 3%
Population Forecasts	Forecasts for population trends and net migration over the next 30 years relate to the economic drivers that attract and/or retain a growing population.	Declining	No significant Growth or Decline	Growing

6.

Are residential homes able to withstand a natural hazard or weather incident?

Newer homes are more likely to have been constructed to withstand natural hazards and weather incidents. Older homes and manufactured homes may be more vulnerable to damages and/or more difficult to repair. Homes without plumbing, electricity or phone services are at a greater risk during an emergency. The capacity to recover quickly from a shock is greater when people (the workforce) are not displaced.



Data to Answer the Question		Results
Housing Data Source: QCEW	About 3% of the houses in Linn County were built in 2010 or later. Immediately following the last economic recession, Linn County experienced a notable decline in housing construction between 2010-2013, but since 2014, housing construction is slowly rebounding. 38% of housing was built before 1970, a slightly higher lower proportion than in the state.	
	Mobile homes make up a higher portion of the housing stock than the state average (12% v. 9%)	
Utility & Services Source: Oregon Employment Department (OED)	The split of residents who use gas and electricity for heating fuel is comparable to the state figures (approximately 40% gas, 50% electricity). 2% of housing or less lack of plumbing, kitchen, or telephone services.	




Data Definitions & Thresholds				
Housing Data	Percentage of homes built in the last decade	Less than 4%	4-15%	More than 15%
	Percentage of homes built before 1970	More than 60%	40%-60%	Less than 40%
	Percentage of housing stock that is classified as mobile homes	More than 10%	5-10%	Less than 5%
Utility & Services	Percentage of homes without complete plumbing	More than 2%	1-2%	Less than 1%
	Percentage of homes without complete kitchens	More than 3%	1-3%	Less than 1%
	Percentage of homes dependent on any single fuel supply	More than 70%	60-70%	Less than 60%

7.

What level of educational attainment and earnings are residents reaching?

People who attain higher education and/or have specialized skills are more likely to be employed and earn higher wages and less likely to primarily depend on public services. Regions that have educational opportunities can provide essential resources and training for local residents preparing to join the workforce. In addition, if economic conditions change and the local employment sectors shift, educational opportunities can be an asset for the community by offering community members new or additional training.

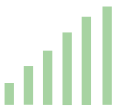

Data to Answer the Question		Results
Local resources for training and education Source: OCWCOG	There is one community college serving Linn County, Oregon. Linn-Benton Community College offers degrees and certificates in several areas of study, including several agriculture programs. An apprenticeship program for people over 17 is available that specialized in keeping people employed in various trades. There is a partnership with Oregon State University that helps students transfer credits from an Associates Degree towards a Bachelors degree.	
Educational attainment of populations Source: ACS (2018)	90% of people in Linn County have attained a minimum of a high-school degree, and 20% of people have earned a bachelor's degree or higher. In Linn County, a smaller proportion of residents have attained higher-education than the state averages. People with only a high-school degree in Lincoln County have median earnings that are 102% of the state median for those with only a high school degree.	



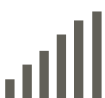
Data Definitions & Thresholds				
Educational attainment and earnings	Percentage of population (25 years+) with Bachelor's Degree or higher	Less than 25%	25%-35%	More than 35%
	Median earnings of high school graduates (or equivalency) in the county as a percentage of median earnings of high school graduates in state	Less than 75%	75%-105%	More than 105%

8.

Do residents have access to health and wellness facilities?

A resilient economy can consistently provide residents with basic needs, including shelter, safety, and food. Hospitals, clinics, and grocery stores are vital for preparing for, responding to, and recovering from a major disruption. High levels of baseline community health are important for resilience because communities with healthy residents are better able to absorb the impacts of, and recover from, disasters. Health insurance coverage is a positive indicator of community resilience.

Data to Answer the Question		Results
Hospital, urgent care, and pharmacy coverage Source: OCWCOG & LCOG	Health services are concentrated in Albany, Lebanon, and other larger communities in neighboring counties, but smaller communities to the north and east are still mostly within 15 miles of the nearest health care facility.	
Insurance Coverage Source: ACS (2018)	Just under 8% of Linn County residents are uninsured, a slightly higher rate than the State (7%).	

Data Definitions & Thresholds				
Hospital, urgent care, and pharmacy coverage	Percentage of population within 15 miles of a medical facility (hospital, urgent care, clinic)	Less than 40%	40-70%	More than 70%
Insurance Coverage	Percentage of uninsured (non-incarcerated) population	More than 11%	7-11%	Less than 7%

D. County Factsheets





Benton County

Economic Resilience Factsheet

County Data

Median Household Income	
County	\$58,655
State	\$59,393
National	\$60,293

Gross Median Rent & Rental Vacancy Rate		
County	\$1,019	2.9%
State	\$1,050	2.4%
National	\$1,023.00	3.0%

Median Home Value	
County	\$303,200
State	\$287,300
National	\$204,900

Median Age & Age Dependency Ratio		
Age dependency ratio describes the level of pressure on an economy from supporting its non-productive population. To calculate, the number of dependents in a population (under-18 and over-65) is divided by the number of working-age (18-64) people.		
County	32.9	46.8
State	39.2	60.6
National	37.9	62.0

Data Source: census.gov/data (ACS 2018 5yr Estimates)

Diversified economies are more resilient.
Regions that have a concentration of jobs in fewer industries are less resilient.

No single industry should account for more than 20% of total employment.

TOP 3 INDUSTRIES & AVERAGE WAGES

#1	16.1%	total employment	Health Care & Social Assistance	\$59,203
#2	10.0%	total employment	Accommodation & Food Services	\$17,647
#3	9.8%	total employment	Retail Trade	\$17,647

Data Source: OED 2019

Employment growth in higher-wage industries indicates economic resilience.
Industries that rely on natural resources, taxes, and international trade can be more susceptible to changing regulations.

FASTEST GROWING INDUSTRIES

Industry	Avg. Industry Wages	Percent Change in Employment (2010-2019)
Health care and social assistance	\$58,690	31%
Mining, logging, and construction	(C)	29%
Leisure and hospitality	\$17,464	26%

Data Source: OED 2019

FASTEST SHRINKING INDUSTRIES

Industry	Avg. Industry Wages	Percent Change in Employment (2010-2019)
Information	\$74,594	-29%
Federal government	\$80,802	-19%
Durable goods manufacturing	(C)	-12%

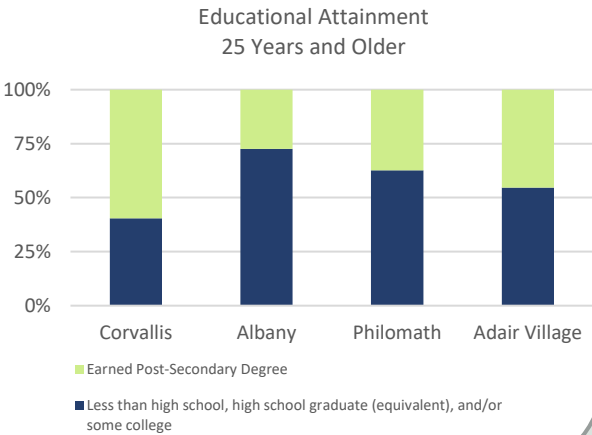
ECONOMIC
RESILIENCE

BENTON COUNTY

	Corvallis	Albany	Philomath	Adair Village
POPULATION	59,730	52,736	5,370	1,325
MEDIAN HOUSEHOLD INCOME	\$49,835	\$55,263	\$59,880	\$69,688
MEDIAN AGE	27	37	35	33

Educational Attainment & Median Household Earnings

	Corvallis		Albany		Philomath		Adair Village	
Population 25 years+ w earnings	31,041		35,247		3,165		681	
Median Earnings	\$36,225		\$37,226		\$36,667		\$38,286	
Less than high school graduate	4%	\$21,801	9%	\$21,737	9%	-	2%	\$41,667
High school graduate (includes equivalency)	12%	\$21,615	24%	\$29,541	20%	\$31,063	9%	\$31,250
Some college or associate's degree	25%	\$25,949	41%	\$37,364	33%	\$35,920	44%	\$30,714
Bachelor's degree	31%	\$39,328	18%	\$40,710	24%	\$38,475	30%	\$39,412
Graduate or professional degree	29%	\$54,603	9%	\$58,786	13%	\$66,992	15%	\$50,500



Employment

	Corvallis	Albany	Philomath	Adair Village
Civilian employed population 16 years and over	28,210	24,222	2,547	611
Percent of Total Employment, by Industry				
Agriculture, Forestry, Fishing and Hunting, and Mining	1.5%	2.2%	3.6%	1.3%
Construction	2.5%	6.2%	7.2%	3.1%
Manufacturing	8.1%	13.1%	9.2%	2.6%
Wholesale Trade	1.7%	3.5%	0.3%	0.3%
Retail Trade	9.4%	11.9%	7.2%	4.8%
Transportation and Warehousing, and Utilities	1.8%	4.7%	2.6%	2.5%
Information	1.6%	1.2%	0.9%	4.8%
Finance and Insurance, and Real Estate and Rental and Leasing	2.6%	5.0%	3.5%	6.7%
Professional, Scientific, and Management, and Administrative and Waste Management Services	11.0%	7.0%	8.4%	9.7%
Educational Services, and Health Care and Social Assistance	40.0%	25.9%	34.1%	45.5%
Arts, Entertainment, and Recreation, and Accommodation and Food Services	12.2%	8.0%	10.4%	8.2%
Other Services, Except Public Administration	4.2%	5.3%	7.3%	7.7%
Public Administration	3.7%	6.0%	5.1%	3.0%

Housing

	Corvallis		Albany		Philomath		Adair Village	
Total Housing Units	25,576		21,591		2,022		380	
Occupied Units % - Vacant Units %	92%	8%	94%	6%	87%	13%	96%	4%
Rental Vacancy Rate	3%		2%		3%		0%	
Single-family Homes %	54%		68%		72%		86%	
Mobile Homes %	3%		5%		6%		0%	
Multi-Unit Homes %	42%		25%		20%		14%	
Median Home Value (Owner-occupied)	\$305,100		\$204,700		\$229,900		\$218,500	
Median Gross Rent	\$1,020		\$928		\$827		\$1,363	
Cost-Burdened (Gross Rent Above 30% of Household Income)	55%		47%		67%		39%	

Source: census.gov/data (ACS 2018 5yr Estimates)

Common Trend

Notable County Data



Lane County

Economic Resilience Factsheet

County Data

Median Household Income	
County	\$49,958
State	\$59,393
National	\$60,293

Gross Median Rent & Rental Vacancy Rate		
County	\$954	2.2%
State	\$1,050	2.4%
National	\$1,023.00	3.0%

Median Home Value	
County	\$246,500
State	\$287,300
National	\$204,900

Median Age & Age Dependency Ratio		
Age dependency ratio describes the level of pressure on an economy from supporting its non-productive population. To calculate, the number of dependents in a population (under-18 and over-65) is divided by the number of working-age (18-64) people.		
County	39.4	61.6
State	39.2	60.6
National	37.9	62.0

Data Source: census.gov/data (ACS 2018 5yr Estimates)

Diversified economies are more resilient.
Regions that have a concentration of jobs in fewer industries are less resilient.

No single industry should account for more than 20% of total employment.

TOP 3 INDUSTRIES & AVERAGE WAGES

#1	17%	total employment	Health Care & Social Assistance	\$48,953
#2	13%	total employment	Retail Trade	\$29,899
#3	10%	total employment	Accommodation and Food Services	\$18,635

Data Source: OED 2019

Employment growth in higher-wage industries indicates economic resilience.
Industries that rely on natural resources, taxes, and international trade can be more susceptible to changing regulations.

FASTEST GROWING INDUSTRIES

Industry	Avg. Industry Wages	Percent Change in Employment (2010-2019)
Construction	\$52,687	42%
Healthcare and social assistance	\$48,953	32%
Food Services	\$18,233	30%

Data Source: OED 2019

FASTEST SHRINKING INDUSTRIES

Industry	Avg. Industry Wages	Percent Change in Employment (2010-2019)
Information	\$70,559	-31%
Federal government	\$70,371	-1%
Wood product	\$56,936	4%

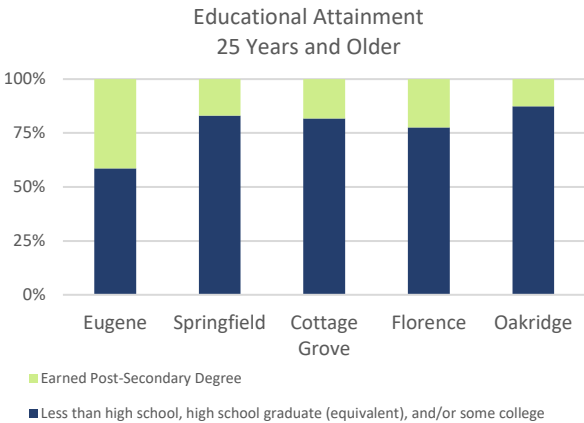
ECONOMIC
RESILIENCE

LANE COUNTY

	Eugene	Springfield	Cottage Grove	Florence	Oakridge
POPULATION	173,620	61,535	10,645	10,912	3,998
MEDIAN HOUSEHOLD INCOME	\$49,029	\$43,157	\$47,316	\$40,833	\$37,514
MEDIAN AGE	34	36	39	60	43

Educational Attainment & Median Household Earnings

	Eugene		Springfield		Cottage Grove		Florence		Oakridge	
Population 25 years+ w earnings	35,915		34,789		34,717		35,066		31,125	
Less than high school graduate	4%	\$19,138	9%	\$23,008	8%	-	2%	-	12%	\$22,500
High school graduate (includes equivalency)	12%	\$21,739	23%	\$27,205	19%	\$32,500	11%	\$28,750	36%	\$28,281
Some college or associate's degree	24%	\$25,583	41%	\$33,614	35%	\$28,224	46%	\$25,625	45%	\$38,036
Bachelor's degree	31%	\$38,670	18%	\$44,015	24%	\$35,586	28%	\$37,039	4%	\$73,333
Graduate or professional degree	29%	\$51,720	9%	\$53,821	14%	\$60,903	14%	\$50,625	2%	\$51,250



Employment

	Eugene	Springfield	Cottage Grove	Florence	Oakridge
Civilian employed population 16 years and over	105,134	41,095	6,925	7,333	2,467
Percent of Total Employment, by Industry					
Agriculture, Forestry, Fishing and Hunting, and Mining	1%	2%	6%	2%	17%
Construction	4%	6%	9%	5%	12%
Manufacturing	8%	11%	17%	3%	9%
Wholesale Trade	3%	4%	4%	1%	0%
Retail Trade	13%	15%	14%	18%	9%
Transportation and Warehousing, and Utilities	3%	5%	3%	2%	6%
Information	2%	2%	0%	1%	0%
Finance and Insurance, and Real Estate and Rental and Leasing	5%	4%	4%	9%	3%
Professional, Scientific, and Management, and Administrative and Waste Management Services	11%	9%	5%	7%	5%
Educational Services, and Health Care and Social Assistance	31%	24%	22%	23%	13%
Arts, Entertainment, and Recreation, and Accommodation and Food Services	11%	10%	12%	24%	18%
Other Services, Except Public Administration	4%	6%	4%	3%	6%
Public Administration	3%	3%	2%	4%	2%

Housing

	Eugene		Springfield		Cottage Grove		Florence		Oakridge	
Total Housing Units	73,049		25,494		4,226		5,079		1,791	
Occupied Units % - Vacant Units %	94%	6%	96%	4%	94%	6%	85%	15%	80%	20%
Rental Vacancy Rate	2%		1%		0.7%		2%		6%	
Single-family Homes %	60%		64%		76%		62%		64%	
Mobile Homes %	4%		7%		5%		19%		25%	
Multi-Unit Homes %	37%		28%		19%		19%		10%	
Median Home Value (Owner-occupied)	\$272,000		\$189,700		\$180,200		\$198,300		\$100,700	
Median Rent	\$988		\$893		\$867		\$845		\$794	
Cost-Burdened (Gross Rent Above 30% of Household Income)	57%		50%		61%		54%		29%	

Source: census.gov/data (ACS 2018 5yr Estimates)

Common Trend Notable County Data



Lincoln County

Economic Resilience Factsheet

County Data

Median Household Income	
County	\$46,061
State	\$59,393
National	\$60,293

Gross Median Rent & Rental Vacancy Rate		
County	\$880	3.7%
State	\$1,050	2.4%
National	\$1,023.	3.0%

Median Home Value	
County	\$233,400
State	\$287,300
National	\$204,900

Median Age & Age Dependency Ratio		
Age dependency ratio describes the level of pressure on an economy from supporting its non-productive population. To calculate, the number of dependents in a population (under-18 and over-65) is divided by the number of working-age (18-64) people.		
County	51.3	81.1
State	39.2	60.6
National	37.9	62.0

Data Source: census.gov/data (ACS 2018 5yr Estimates)

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Regions that have a concentration of jobs in fewer industries are less resilient.

No single industry should account for more than 20% of total employment.

TOP 3 INDUSTRIES & AVERAGE WAGES

#1	23.9%	total employment	Accommodation & Food Services	\$22,861
#2	15.4%	total employment	Retail Trade	\$27,526
#3	10.7%	total employment	Health Care & Social Assistance	\$51,357

Data Source: OED 2019

Employment growth in higher-wage industries indicates economic resilience.
Industries that rely on natural resources, taxes, and international trade can be more susceptible to changing regulations.

FASTEST GROWING INDUSTRIES

Industry	Avg. Industry Wages	Percent Change in Employment (2010-2019)
Food manufacturing	\$52,687	34%
Food services	\$48,953	25%
Professional services	\$18,233	20%

Data Source: OED 2019

FASTEST SHRINKING INDUSTRIES

Industry	Avg. Industry Wages	Percent Change in Employment (2010-2019)
Information	\$39,158	-28%
Durable goods manufacturing	C	-16%
Other services	\$24,233	-14%

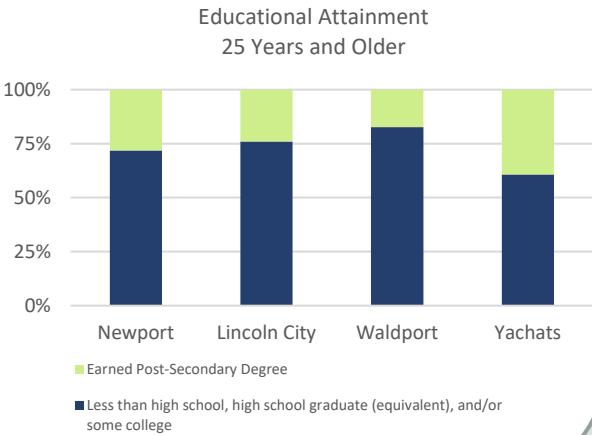
ECONOMIC
RESILIENCE

LINCOLN COUNTY

	Newport	Lincoln City	Waldport	Yachats
POPULATION	10,381	8,684	2,043	669
MEDIAN HOUSEHOLD INCOME	\$45,250	\$38,010	\$46,367	\$49,293
MEDIAN AGE	45	48	54	60

Educational Attainment & Median Household Earnings

	Newport		Lincoln City		Waldport		Yachats	
Population 25 years+ w earnings	7,594		6,432		1,579		574	
Median Earnings	\$28,581		\$26,128		\$31,623		\$19,444	
Less than high school graduate	8%	\$22,014	12%	\$25,750	6%	-	12%	-
High school graduate (includes equivalency)	25%	\$218,313	27%	\$20,811	27%	\$25,417	15%	\$23,000
Some college or associate's degree	39%	\$29,931	36%	\$26,654	50%	\$30,903	34%	\$12,250
Bachelor's degree	17%	\$33,669	12%	\$35,089	10%	\$35,882	21%	\$20,000
Graduate or professional degree	12%	\$60,217	12%	\$35,278	8%	\$67,292	19%	\$40,446



Employment

	Newport	Lincoln City	Waldport	Yachats
Civilian employed population 16 years and over	4,460	3,633	750	260
Percent of Total Employment, by Industry				
Agriculture, Forestry, Fishing and Hunting, and Mining	5.4%	1.1%	3.3%	0.0%
Construction	6.7%	4.4%	10.7%	0.0%
Manufacturing	6.5%	2.1%	5.2%	15.0%
Wholesale Trade	1.5%	1.8%	0.0%	1.5%
Retail Trade	12.2%	16.8%	12.0%	7.3%
Transportation and Warehousing, and Utilities	2.9%	5.3%	13.3%	0.0%
Information	0.4%	2.1%	1.9%	0.0%
Finance and Insurance, and Real Estate and Rental and Leasing	3.9%	5.4%	3.7%	5.0%
Professional, Scientific, and Management, and Administrative and Waste Management Services	9.2%	6.7%	10.9%	17.7%
Educational Services, and Health Care and Social Assistance	20.4%	13.8%	11.7%	13.1%
Arts, Entertainment, and Recreation, and Accommodation and Food Services	20.8%	32.0%	20.7%	33.1%
Other Services, Except Public Administration	4.1%	3.4%	0.7%	5.8%
Public Administration	6.0%	5.2%	5.9%	1.5%

Housing

	Newport		Lincoln City		Waldport		Yachats	
Total Housing Units	5,694		6,710		1,162		879	
Occupied Units % - Vacant Units %	80%	20%	59%	41%	80%	20%	38%	62%
Rental Vacancy Rate	5%		2%		0%		1.5%	
Single-family Homes %	61%		71%		76%		88%	
Mobile Homes %	8%		7%		10%		3%	
Multi-Unit Homes %	29%		22%		12%		9%	
Median Home Value (Owner-occupied)	\$239,600		\$226,200		\$212,700		\$344,900	
Median Gross Rent	\$856		\$902		\$772		\$1,040	
Cost-Burdened (Gross Rent Above 30% of Household Income)	44%		50%		56%		52%	

Source: census.gov/data (ACS 2018 5yr Estimates)

Common Trend

Notable County Data



Linn County

Economic Resilience Factsheet

County Data

Median Household Income	
County	\$52,097
State	\$59,393
National	\$60,293

Gross Median Rent & Rental Vacancy Rate		
County	\$928	2.4%
State	\$1,050	2.4%
National	\$1,023.00	3.0%

Median Home Value	
County	\$200,900
State	\$287,300
National	\$204,900

Median Age & Age Dependency Ratio		
Age dependency ratio describes the level of pressure on an economy from supporting its non-productive population. To calculate, the number of dependents in a population (under-18 and over-65) is divided by the number of working-age (18-64) people.		
County	39.7	69.6
State	39.2	60.6
National	37.9	62.0

Data Source: census.gov/data (ACS 2018 5yr Estimates)

Diversified economies are more resilient.
Regions that have a concentration of jobs in fewer industries are less resilient.

No single industry should account for more than 20% of total employment.

TOP 3 INDUSTRIES & AVERAGE WAGES

#1	17.5%	total employment	Manufacturing	\$63,848
#2	12.4%	total employment	Health Care and Social Assistance	\$44,283
#3	11.2%	total employment	Retail Trade	\$27,373

Data Source: OED 2019

Employment growth in higher-wage industries indicates economic resilience.
Industries that rely on natural resources, taxes, and international trade can be more susceptible to changing regulations.

FASTEST GROWING INDUSTRIES

Industry	Avg. Industry Wages	Percent Change in Employment (2010-2019)
Construction	\$55,257	87%
Wood product manufacturing	\$54,057	50%
Primary metal manufacturing	\$85,141	44%

Data Source: OED 2019

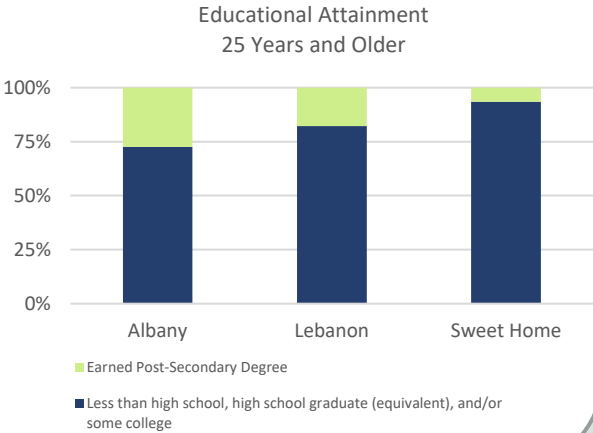
FASTEST SHRINKING INDUSTRIES

Industry	Avg. Industry Wages	Percent Change in Employment (2010-2019)
Federal government	\$74,726	-14%
Professional and business services	\$41,353	-2%
Information	\$48,342	0%

	Albany	Lebanon	Sweet Home
POPULATION	52,736	16,599	9,435
MEDIAN HOUSEHOLD INCOME	\$55,263	\$41,818	\$37,474
MEDIAN AGE	37	42	40

Educational Attainment & Median Household Earnings

	Albany	Lebanon	Sweet Home
Population 25 years+ w earnings	35,247	11,692	6,299
Median Earnings	\$37,226	\$30,695	\$31,316
Less than high school graduate	9% \$21,737	10% \$20,396	14% \$18,696
High school graduate (includes equivalency)	24% \$29,541	33% \$26,031	40% \$27,451
Some college or associate's degree	41% \$37,364	40% \$29,675	40% \$35,759
Bachelor's degree	18% \$40,710	13% \$44,496	5% \$50,833
Graduate or professional degree	9% \$58,786	5% \$52,174	2% -



Employment

	Albany	Lebanon	Sweet Home
Civilian employed population 16 years and over	24,222	6,774	2,888
Percent of Total Employment, by Industry			
Agriculture, Forestry, Fishing and Hunting, and Mining	2.2%	2%	6%
Construction	6.2%	5%	3%
Manufacturing	13.1%	17%	18%
Wholesale Trade	3.5%	2%	0%
Retail Trade	11.9%	15%	16%
Transportation and Warehousing, and Utilities	4.7%	4%	9%
Information	1.2%	1%	0%
Finance and Insurance, and Real Estate and Rental and Leasing	5.0%	3%	3%
Professional, Scientific, and Management, and Administrative and Waste Management Services	7.0%	6%	8%
Educational Services, and Health Care and Social Assistance	25.9%	30%	20%
Arts, Entertainment, and Recreation, and Accommodation and Food Services	8.0%	9%	9%
Other Services, Except Public Administration	5.3%	3%	4%
Public Administration	6.0%	4%	4%

Housing

	Albany	Lebanon	Sweet Home
Total Housing Units	21,591	7,0901	3,836
Occupied Units % - Vacant Units %	95% 5%	97% 3%	94% 6%
Rental Vacancy Rate	2.3%	0.2%	3.9%
Single-family Homes %	68%	65%	72%
Mobile Homes %	5%	6%	17%
Multi-Unit Homes %	26%	29%	11%
Median Home Value (Owner-occupied)	\$204,700	\$159,900	\$138,600
Median Gross Rent	\$928	\$909	\$863
Cost-Burdened (Gross Rent Above 30% of Household Income)	47%	55%	55%

Source: census.gov/data (ACS 2018 5yr Estimates)

Common Trend

Notable County Data









E. Maps

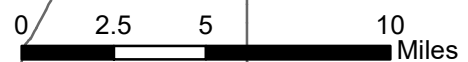


Benton County

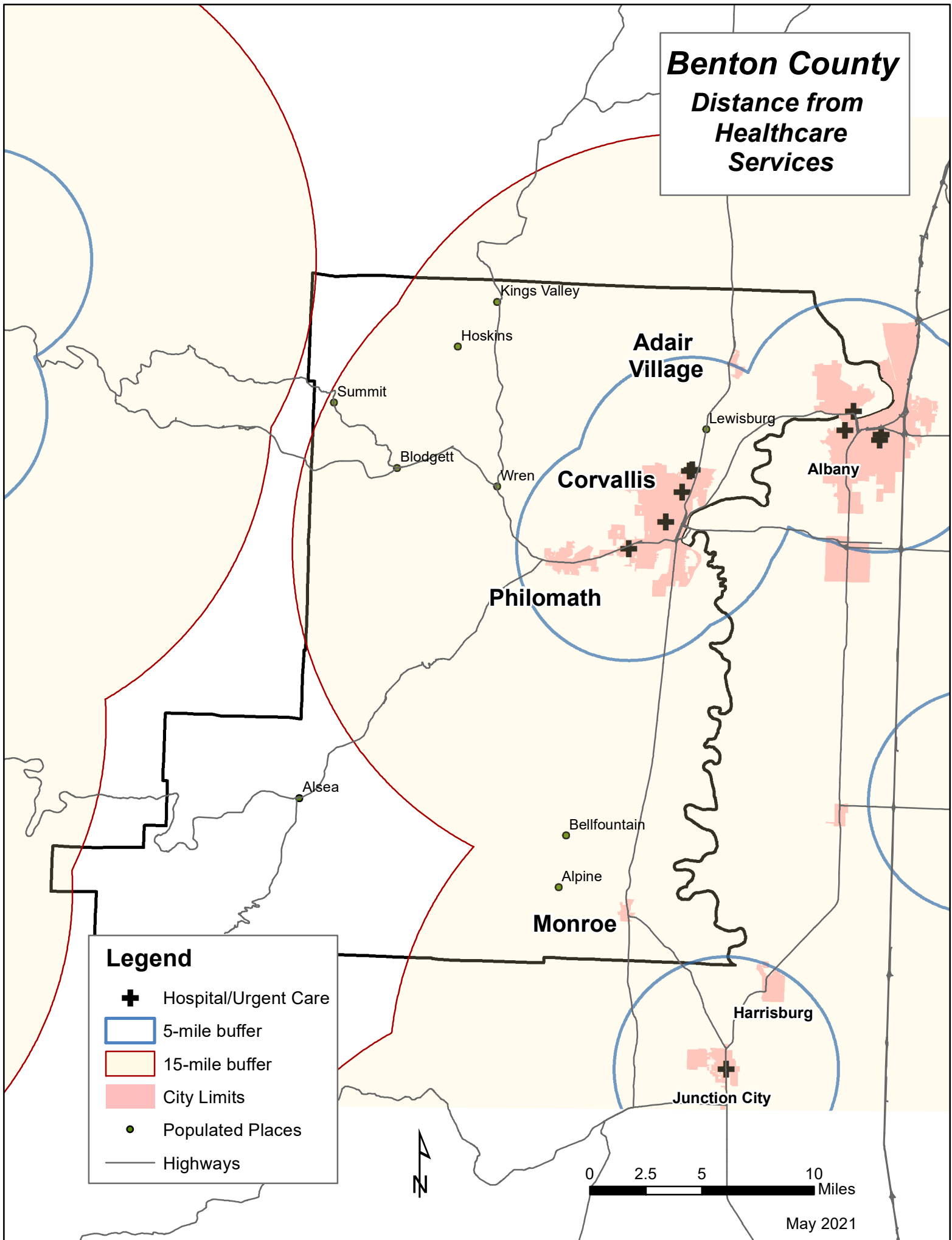
Distance from Healthcare Services

Legend

-  Hospital/Urgent Care
-  5-mile buffer
-  15-mile buffer
-  City Limits
-  Populated Places
-  Highways



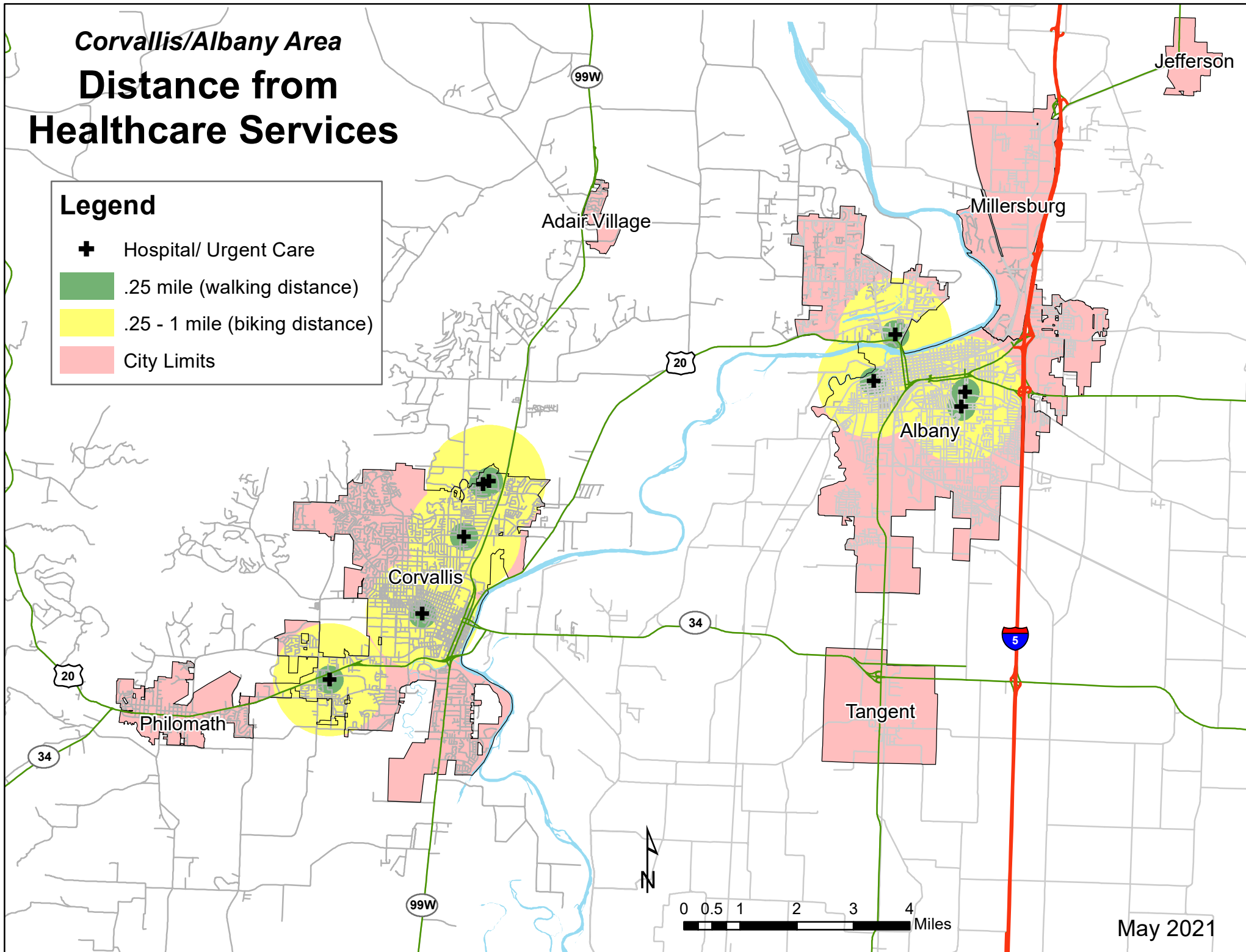
May 2021



Corvallis/Albany Area Distance from Healthcare Services

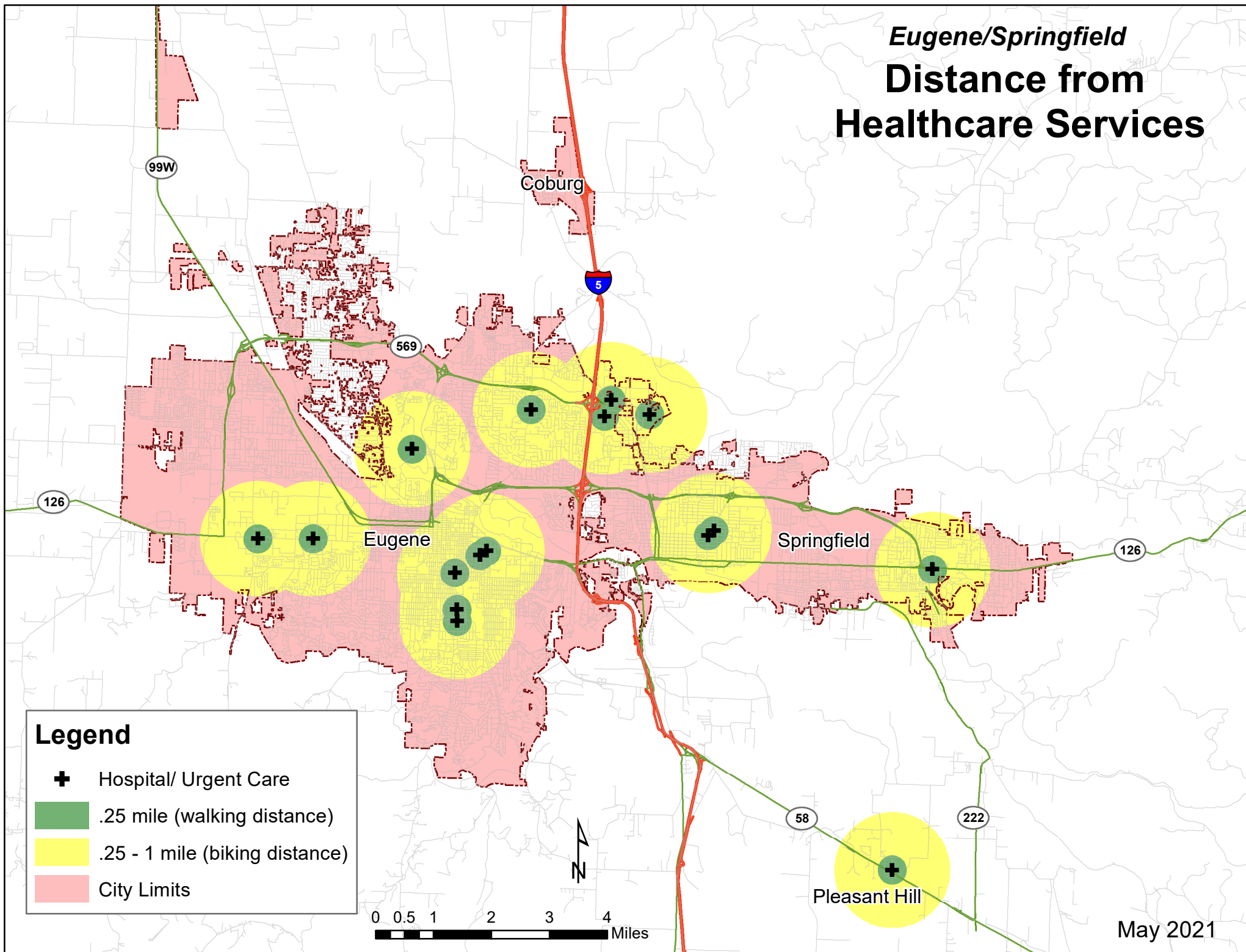
Legend

- ⛶ Hospital/ Urgent Care
- .25 mile (walking distance)
- .25 - 1 mile (biking distance)
- City Limits



May 2021

Eugene/Springfield Distance from Healthcare Services



May 2021

Lane County

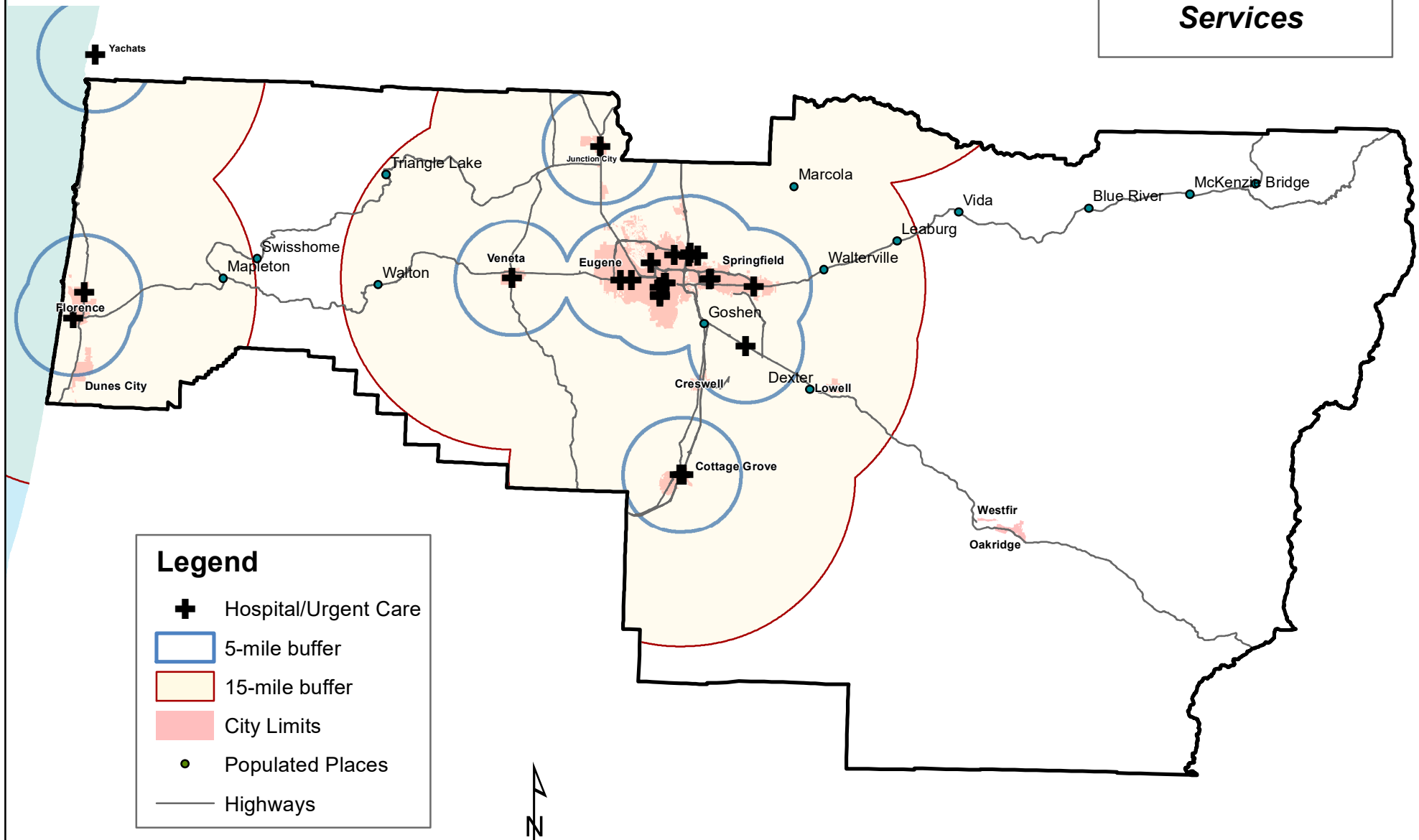
Distance from Healthcare Services

Legend

- ⛶ Hospital/Urgent Care
- 5-mile buffer
- 15-mile buffer
- City Limits
- Populated Places
- Highways







0 5 10 20
Miles

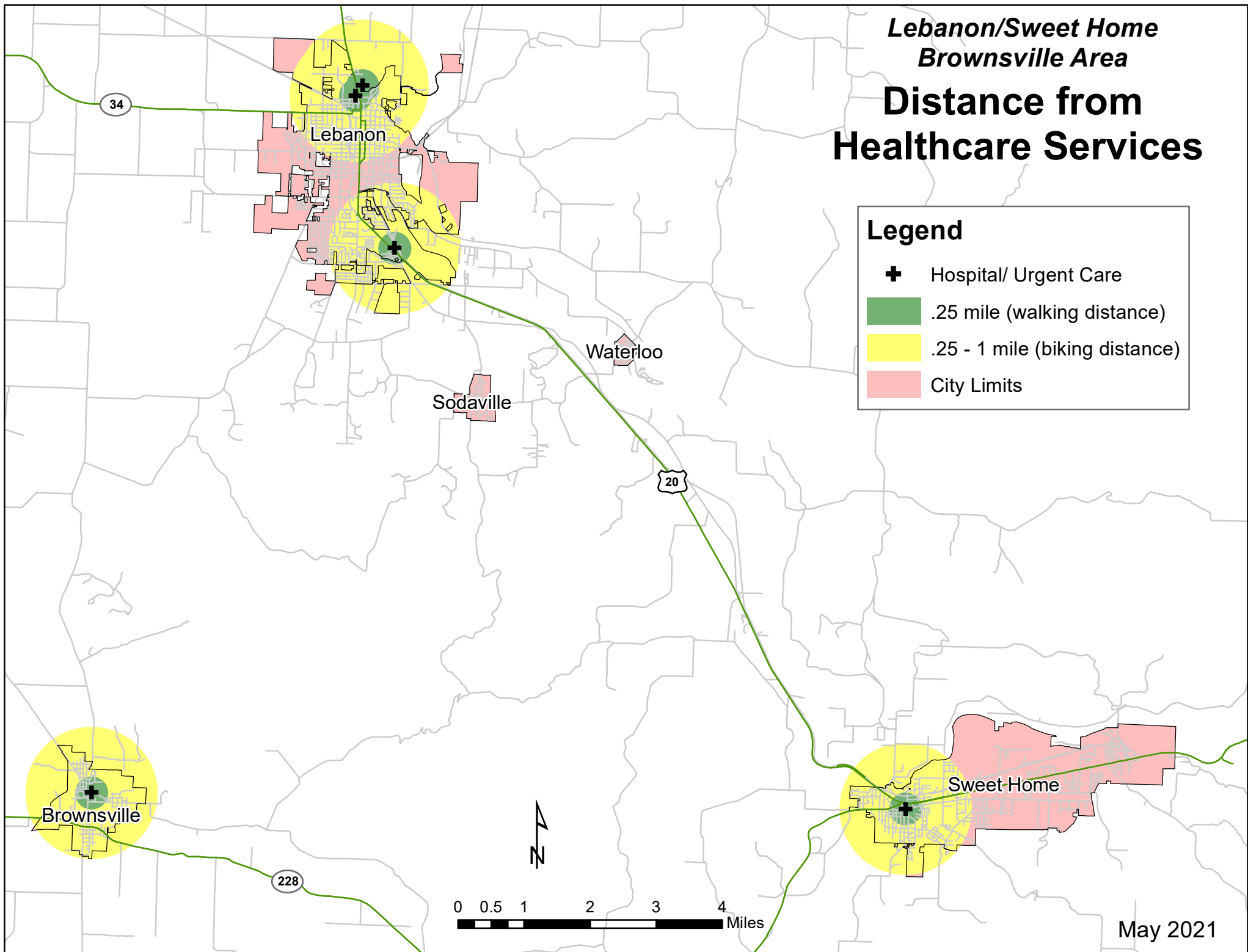


**Lebanon/Sweet Home
Brownsville Area**

Distance from Healthcare Services

Legend

-  Hospital/ Urgent Care
-  .25 mile (walking distance)
-  .25 - 1 mile (biking distance)
-  City Limits



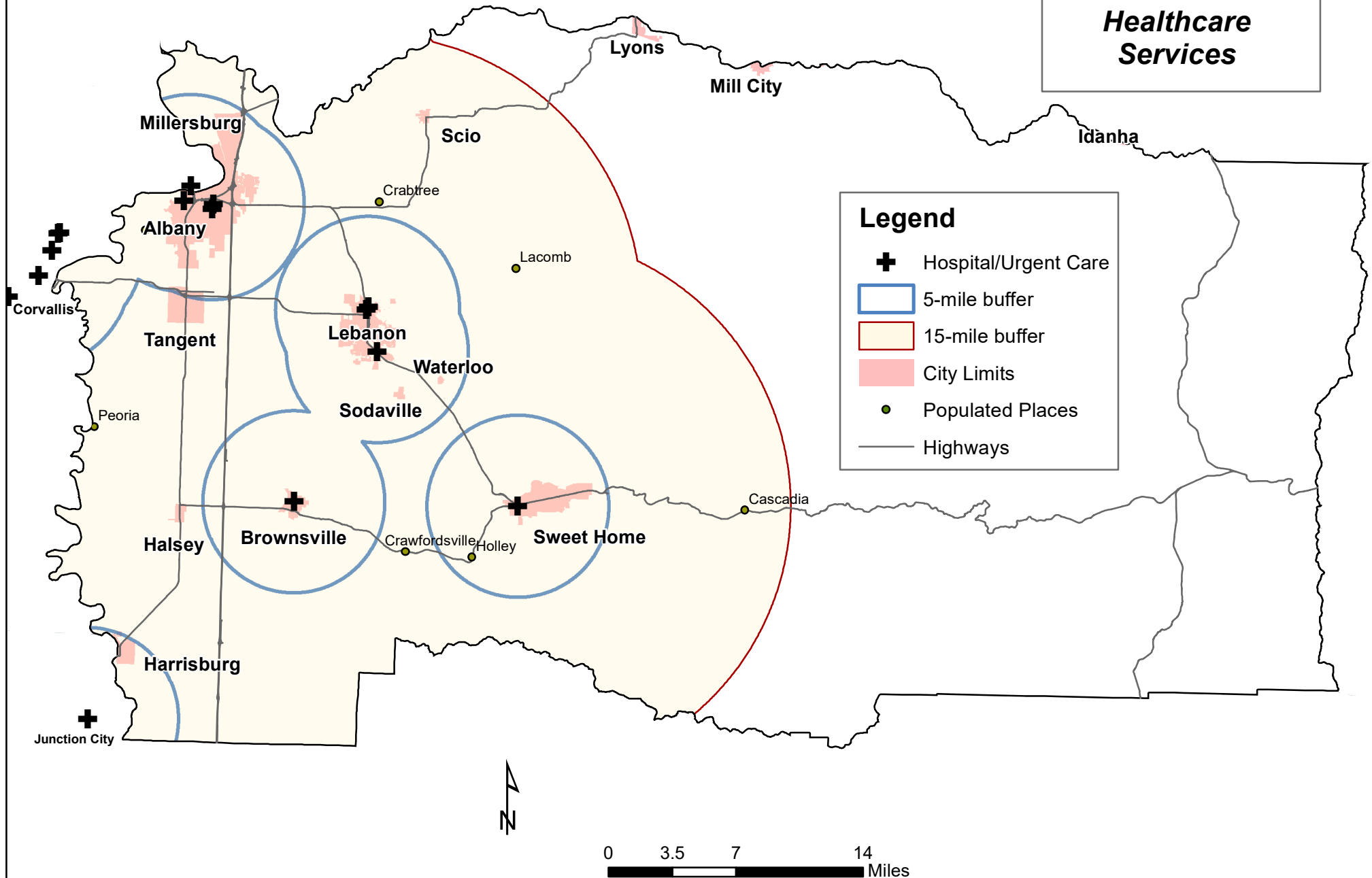
Lincoln County

Distance from Healthcare Services



Linn County

Distance from Healthcare Services



Newport/Toledo/Siletz Area Distance from Healthcare Services

