

Draft Comprehensive Economic Development Strategy 2020-2025



Photos courtesy of Gary Halvorson, Oregon State Archives

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Cascades West Economic Development District



Acknowledgements

This Comprehensive Economic Development Strategy was prepared by:

University of Oregon Institute for Policy Research and Engagement

Aniko Drlik-Muehleck, Project Director
Josh Bruce, Operations Director

Student Associates

Melissa Graciosa, Research Associate
Aqsa Khan, Research Associate
Claire Schechtman, Research Associate

Cascades West Economic Development District Staff

Brenda Wilson, Executive Director, Lane Council of Governments
Dan Betschart, Business Services Program Manager, Lane Council of Governments
Emma Chavez, Community & Economic Development Executive Assistant, Oregon Cascades West Council of Governments
Justin Peterson, Community & Economic Development Planner, Oregon Cascades West Council of Governments
Mike Corwin, Economic Development & Special Projects Consultant, Oregon Cascades West Council of Governments
Nicholas Meltzer, Transportations Program Manager, Oregon Cascades West Council of Governments
Ryan Vogt, Executive Director, 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.

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Cascades West Economic Development District Board Members

Pat Malone	County Commissioner	Benton County
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
Paul Schuytema	Executive Director	Economic Development Alliance of Lincoln Co
Chris Workman	City Manager	City of Philomath
Kelly Hart	Community Development Director	City of Lebanon
John Pascone	President	Albany-Millersburg Economic Development Corp
Pam Barlow-Lind	Tribal Planner	Confederated Tribes of Siletz Indians
Kate Porsche	Economic Development	City of Corvallis
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
Tom Cotter	City Councilor	City of Veneta
Greg Irvin	City Councilor	City of Cottage Grove
Matt Michael	City Manager	City of Veneta

CEDS Update Working Group Contributors

Alison Robertson	Corey Wright	Heather DeSart	Rachael Maddock-Hughes
Alysia Rodgers	Courtney Flathers	Jennifer Damiani	Robert Killen
Austin Ramirez	Courtney Griesel	Jerry Sorte	Sarah Means
Blair Larson	Dave Price	Jodi Mescher	Sean McGuire
Caroline Cummings	Dean Craig	Judy Richter	Seth Sherry
Charlie Mitchell	Derrick Tokos	Juine Chada	Sophie Dykast
Cindy Perry	Ed Dreistadt	Melissa Murphy	

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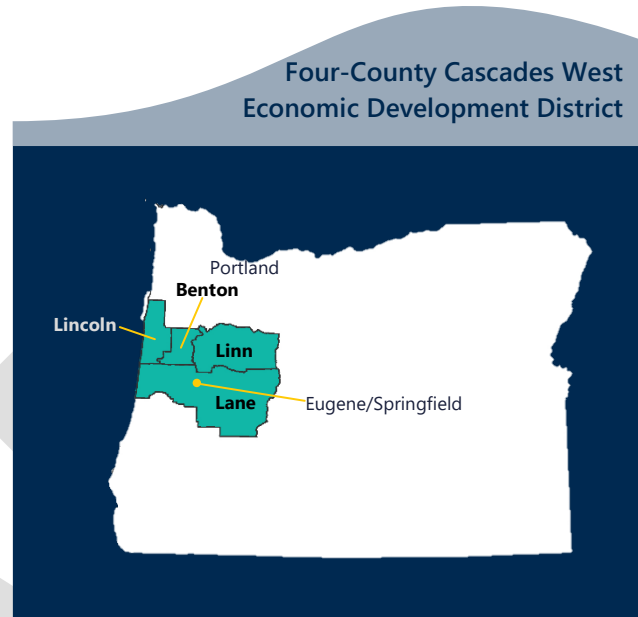
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Introduction

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

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

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

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.

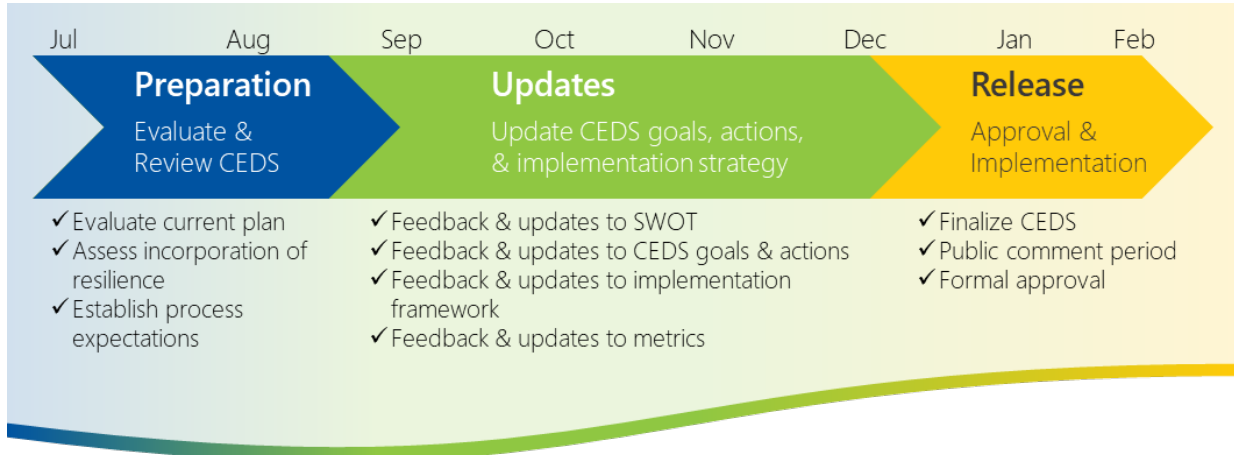
These six principles have guided decisions about CWEDD's 2020 CEDS strategic priorities, implementation structure, and performance indicators. Resilience is woven throughout this Strategy in the hopes that the next time we face wide-ranging shocks like those experienced in 2020, we'll have better tools 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>	Presents appendices from the 2015 CEDS that provide: <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.

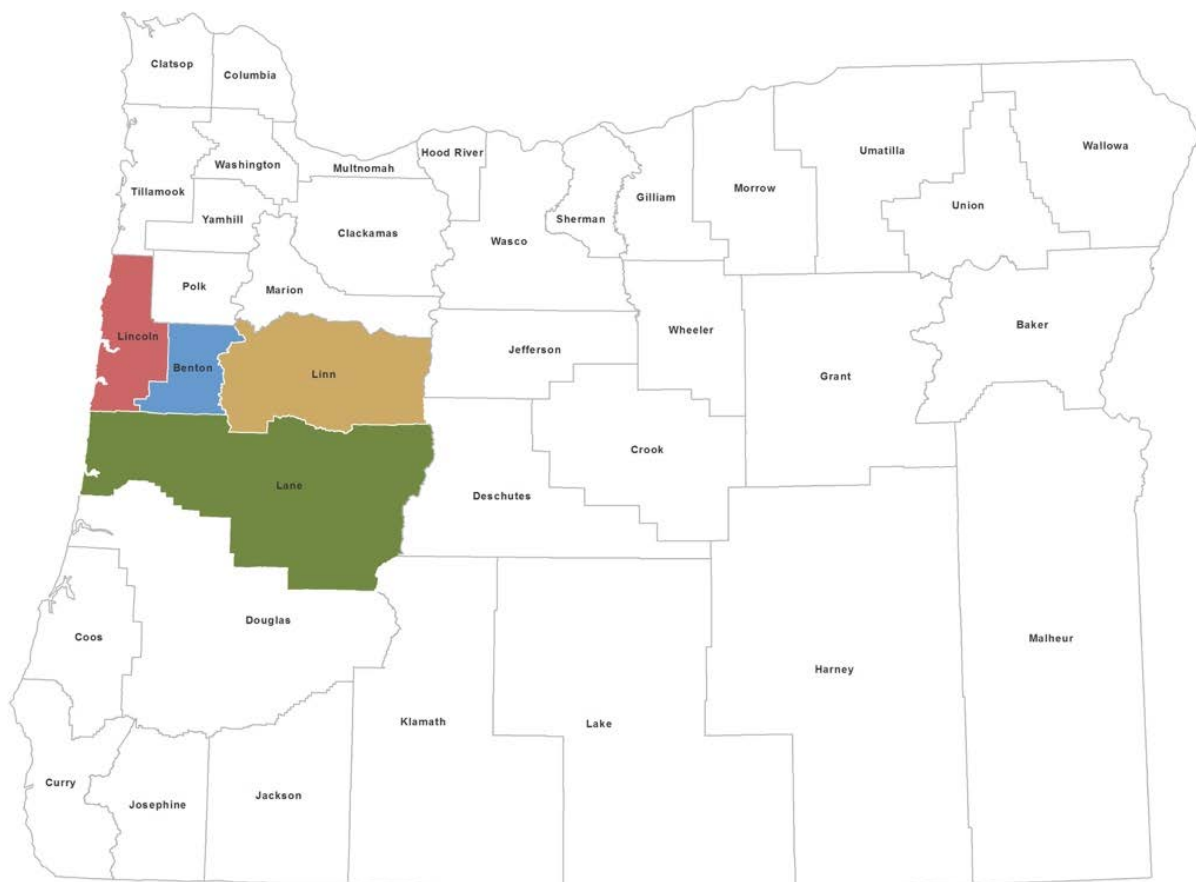
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District Profile

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 on 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, educational services, retail trade, and manufacturing are the top four employers respectively by sector in the region. 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."

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 the Regional Accelerator Innovation Network (RAIN) promote innovation and help entrepreneurs diversify our economy by growing new industries. 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.

<p>Infrastructure Connectivity North-South</p> 	<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
<p>Supportive Business Climate</p> 	<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)

<p>Culture of Innovation</p> 	<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
<p>Growing and Diverse Regional Industries</p> 	<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
<p>Livability factors</p> 	<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.⁴ 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

⁴ Oregon Office of Economic Analysis. (2019). “Oregon’s Demographic Trends.” Retrieved from https://www.oregon.gov/das/OEA/Documents/OR_pop_trend2019.pdf

<p>Workforce Access to Essential Services</p> 	<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
<p>Institutional Barriers</p> 	<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
<p>Complex Boundaries for Regional Collaboration</p> 	<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.

<p>Economic Resilience</p> 	<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
<p>Connections to Existing Resources</p> 	<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
<p>Equity</p> 	<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
<p>New and Expanding Regional Industries</p> 	<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.⁵ 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 2020.⁶ 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.

<p>Natural Hazards and Disaster Events</p> 	<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
<p>Socio-political Factors</p> 	<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

⁵ 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>

⁶ 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

DRAFT

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	<p>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.</p>
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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

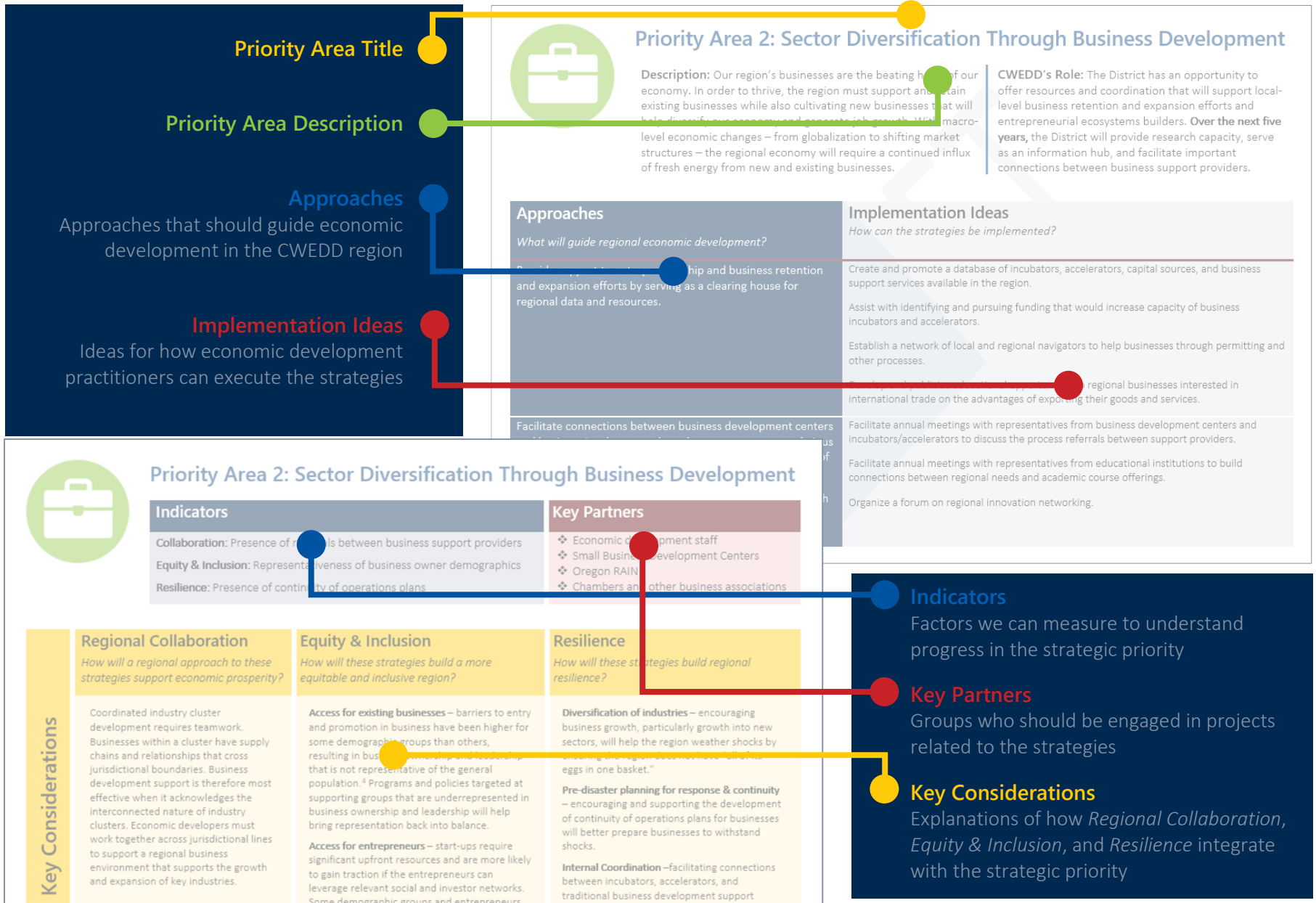
Based on these findings, the 2020-2025 CEDS offers a new approach to guiding and measuring progress on CWEDD's strategic priorities. Rather than a detailed, step-by-step action plan, this section provides a flexible framework for our region's economic developers. The approaches listed in this section 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.	<p>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.</p> <p>City and County economic development staff should deliver an annual CEDS overview and update to elected officials.</p>
Increase CWEDD's staff capacity so CWEDD can provide more support to regional initiatives.	<p>Seek funding to add at least 1 Full Time Equivalent (FTE) staff support position to CWEDD.</p> <p>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).</p>
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
- ❖ Oregon 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.⁷ 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.

⁷ 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.⁸ 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.

⁸ 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

What will guide regional economic development?

Support deliberate coordination between businesses, Workforce Investment Boards (WIBs), and educational institutions to help identify and provide for current employer needs.

Attract and retain younger talent by promoting the region's livability and access to exceptional nature and outdoor recreation opportunities.

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.

Implementation Ideas

How can the strategies be implemented?

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.

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.

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,⁹ 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.

⁹ 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.	Work with local Main Street programs to identify and secure funding for downtown revitalization projects. Work with Destination Marketing Organizations and the Willamette Valley Visitors Association to develop and market local value-added products. Develop/sustain business retention and expansion programs in rural communities with a particular emphasis on succession planning for businesses at risk of closing.
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	<p>CWEDD Board</p> <p>Decision-making body that approves regional priorities through adoption of CEDS. The CWEDD Board will provide direction to CWEDD staff as appropriate.</p>						
	Convening & Support	<p>CWEDD Staff</p> <p>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.</p>						
	Regional and Local Economic Development Stakeholders							
	Advisory	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="background-color: #27ae60; color: white; text-align: center; vertical-align: middle;">QUARTERLY/SEMI-ANNUAL CEDS IMPLEMENTATION MEETINGS</td> <td style="background-color: #34495e; color: white;"> <p>Benton, Lincoln, and Linn County Economic Development Group</p> <p>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.</p> </td> </tr> <tr> <td style="background-color: #27ae60; color: white; text-align: center; vertical-align: middle;">QUARTERLY/SEMI-ANNUAL CEDS IMPLEMENTATION MEETINGS</td> <td style="background-color: #34495e; color: white;"> <p>Lane Economic Committee</p> <p>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.</p> </td> </tr> <tr> <td style="background-color: #27ae60; color: white; text-align: center; vertical-align: middle;">QUARTERLY/SEMI-ANNUAL CEDS IMPLEMENTATION MEETINGS</td> <td style="background-color: #34495e; color: white;"> <p>Additional Practitioners and Stakeholders</p> <p>Additional regional and local practitioners and stakeholders may include representatives from statewide organizations, economic development organizations, business leaders, and entrepreneurs, among others. These individuals should provide updates on their work and add their perspective to CEDS implementation meetings.</p> </td> </tr> </table>	QUARTERLY/SEMI-ANNUAL CEDS IMPLEMENTATION MEETINGS	<p>Benton, Lincoln, and Linn County Economic Development Group</p> <p>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.</p>	QUARTERLY/SEMI-ANNUAL CEDS IMPLEMENTATION MEETINGS	<p>Lane Economic Committee</p> <p>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.</p>	QUARTERLY/SEMI-ANNUAL CEDS IMPLEMENTATION MEETINGS	<p>Additional Practitioners and Stakeholders</p> <p>Additional regional and local practitioners and stakeholders may include representatives from statewide organizations, economic development organizations, business leaders, and entrepreneurs, among others. These individuals should provide updates on their work and add their perspective to CEDS implementation meetings.</p>
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	Working Groups							
	Action	<p>Working Groups</p> <p>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.</p>						

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
Membership	Engage in regional collaboration
	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
Project Champion	Attend CEDS implementation meetings and report back to the wider group of stakeholders
	Communicate with appropriate networks to support implementation
	Engage in regional collaboration
Membership	Convene the working group
	Reach out to CWEDD as needed
	Guide the group in creating schedules, agendas, defining tasks, and project milestones
Membership	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 • 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

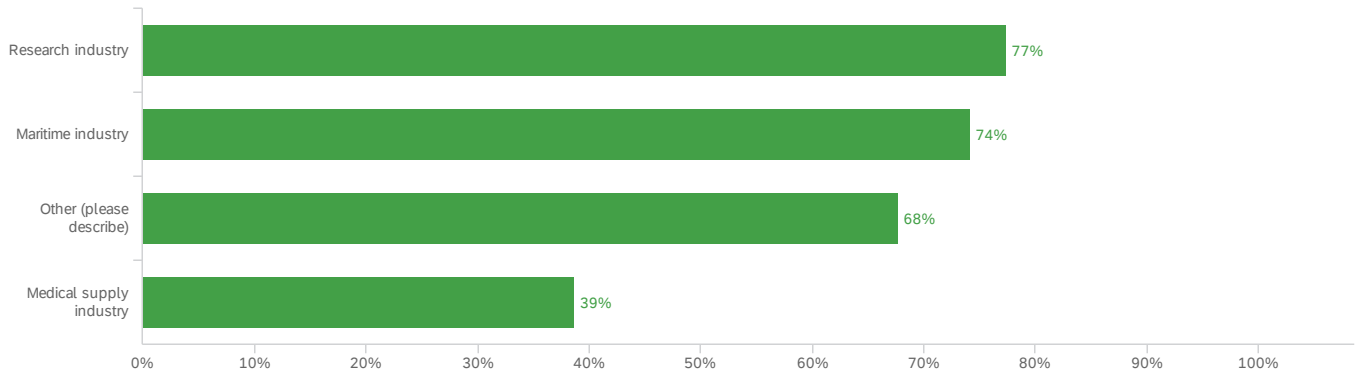
CWEDD CEDS 2020 August Meeting_SWOT

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

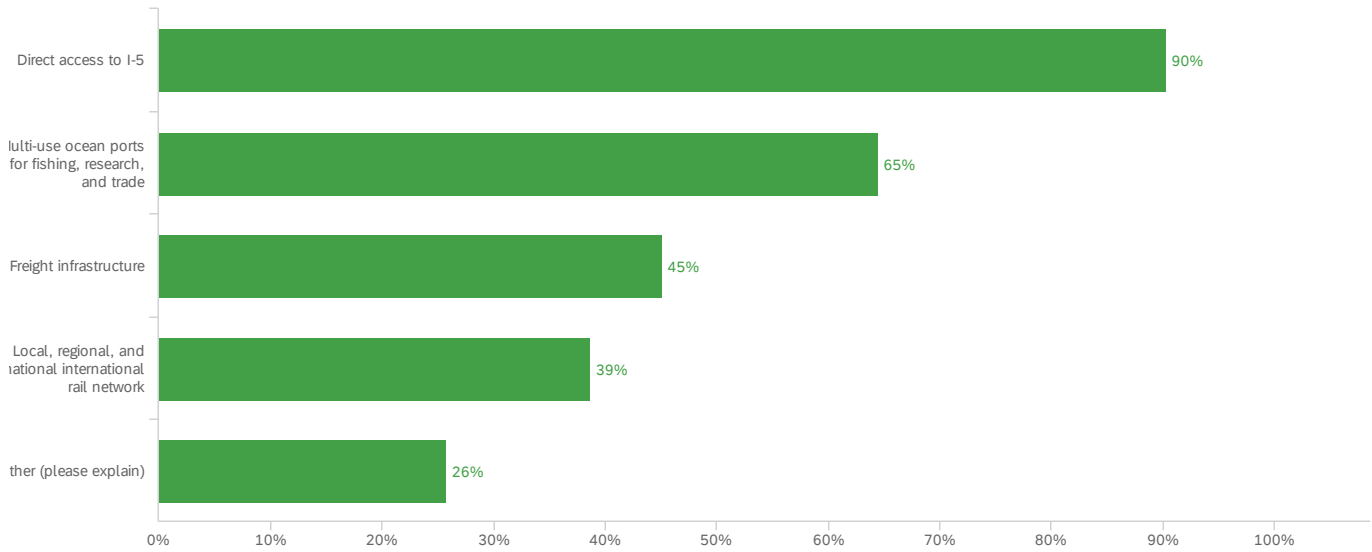
value added local foods - e.e. wine, bar, spirits

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.

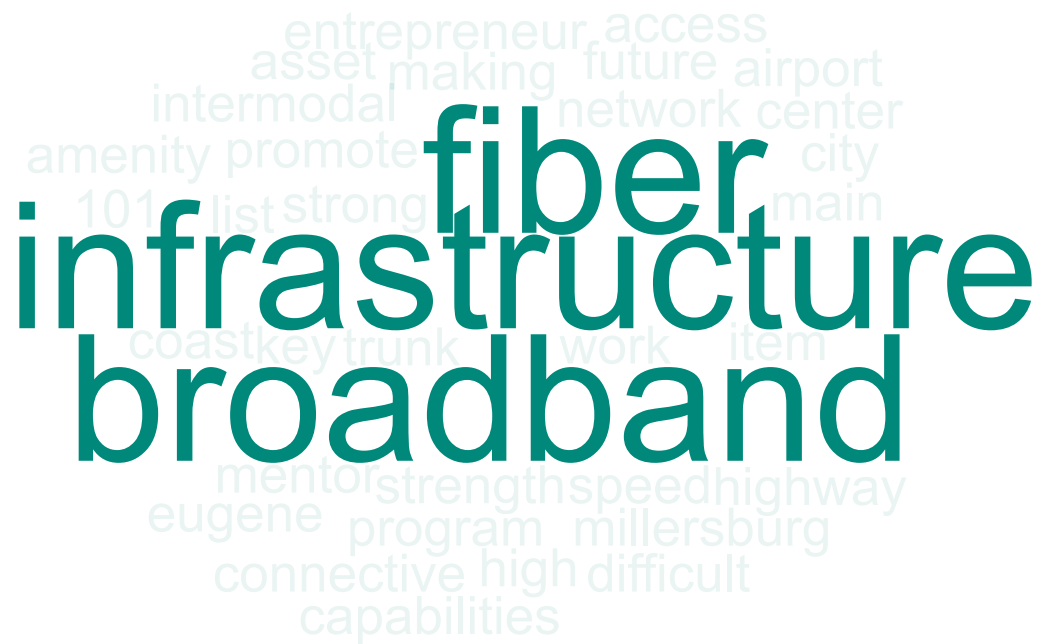


#	Field	Choice Count
1	Direct access to I-5	34% 28
2	Multi-use ocean ports for fishing, research, and trade	24% 20
3	Local, regional, and national international rail network	15% 12
5	Freight infrastructure	17% 14
6	Other (please explain)	10% 8
		82

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

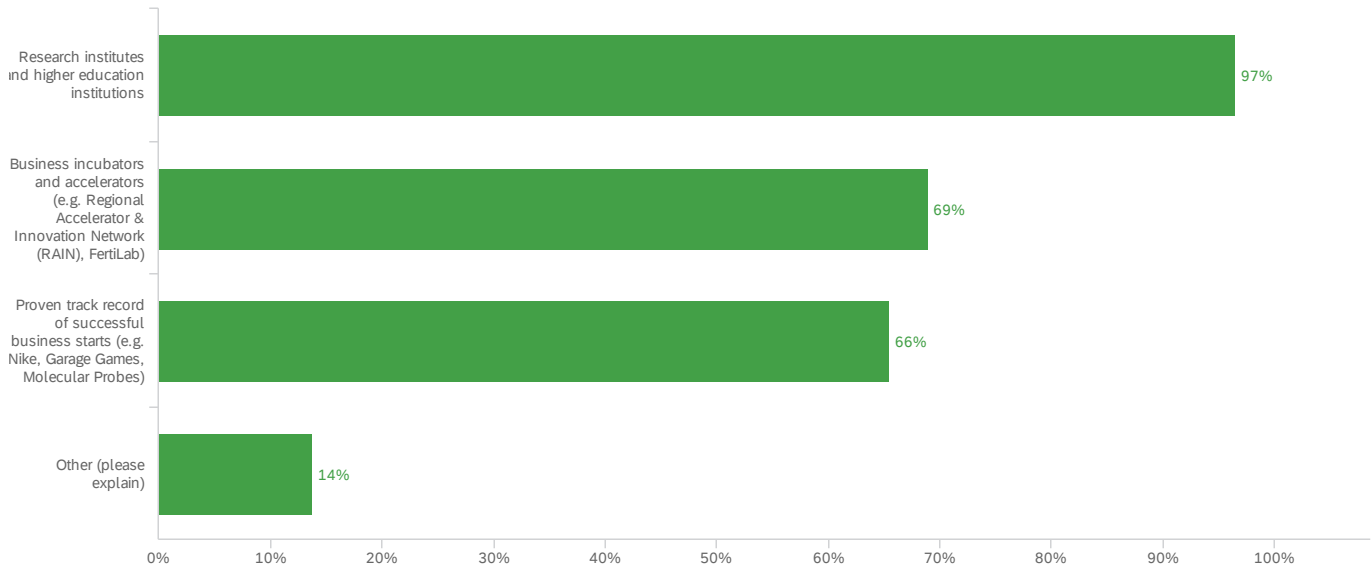
Eugene Airport;

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%
5	Research institutes and higher education institutions	39%
6	Proven track record of successful business starts (e.g. Nike, Garage Games, Molecular Probes)	27%
7	Other (please explain)	6%

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)

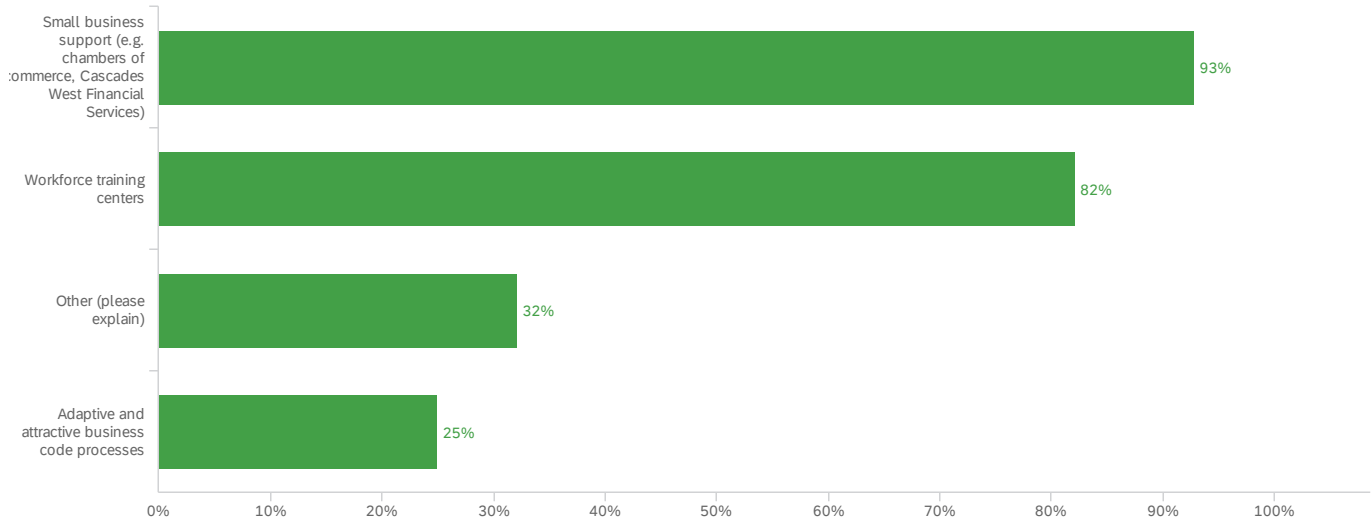
(From a Lincoln City perspective) True high-speed connectivity to allow living on the coast with the ability to move work files.

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

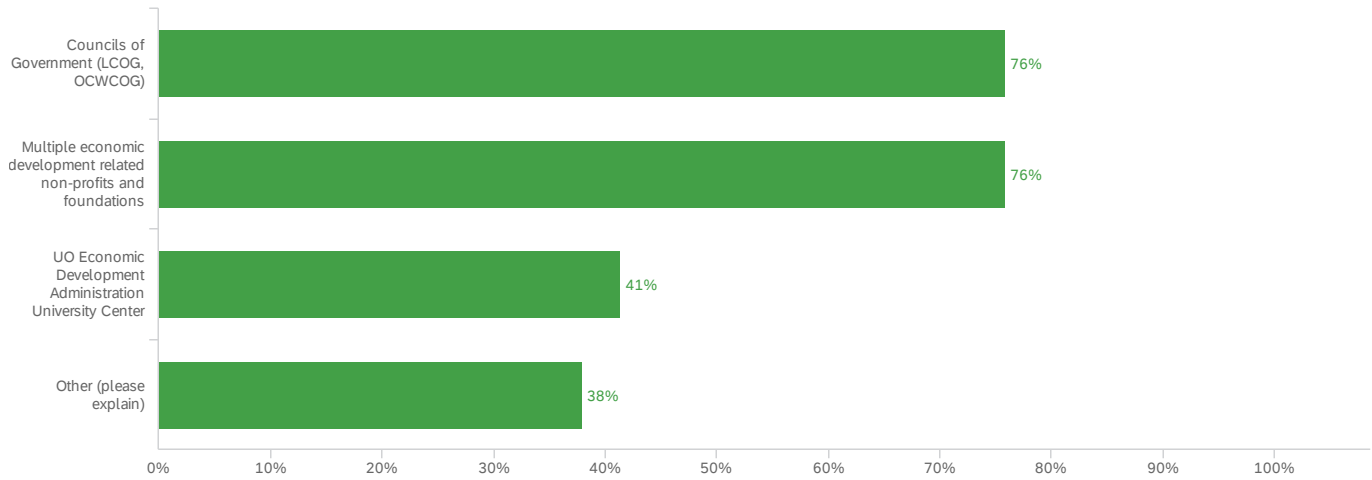
Small Business Development Centers at all Community Colleges in the region.

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.

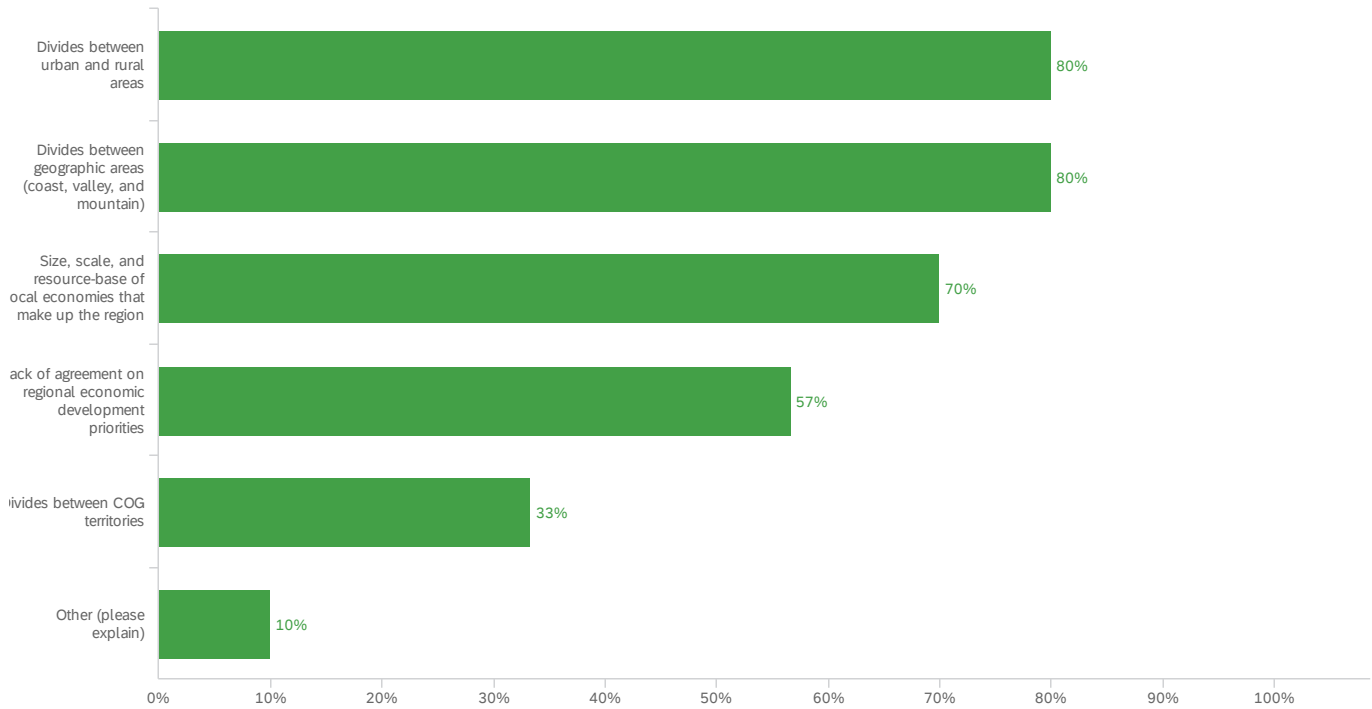
Oregon coast as a recession-proof tourism magnet

climate life quality place amenity housing business

Other words in the cloud include: coast, environment, central, county, development, citizen, core, innovate, arts, nature, decent, incentive, asset, collar, lumber, cultural, opportunity, better, include, mild, magnet, law, improve, eugene, critical, afford, enforce, great, achieve, lack, engage, good, environment, and 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

Showing rows 1 - 1 of 1

Q6_9_TEXT - Other (please explain)

Other (please explain)

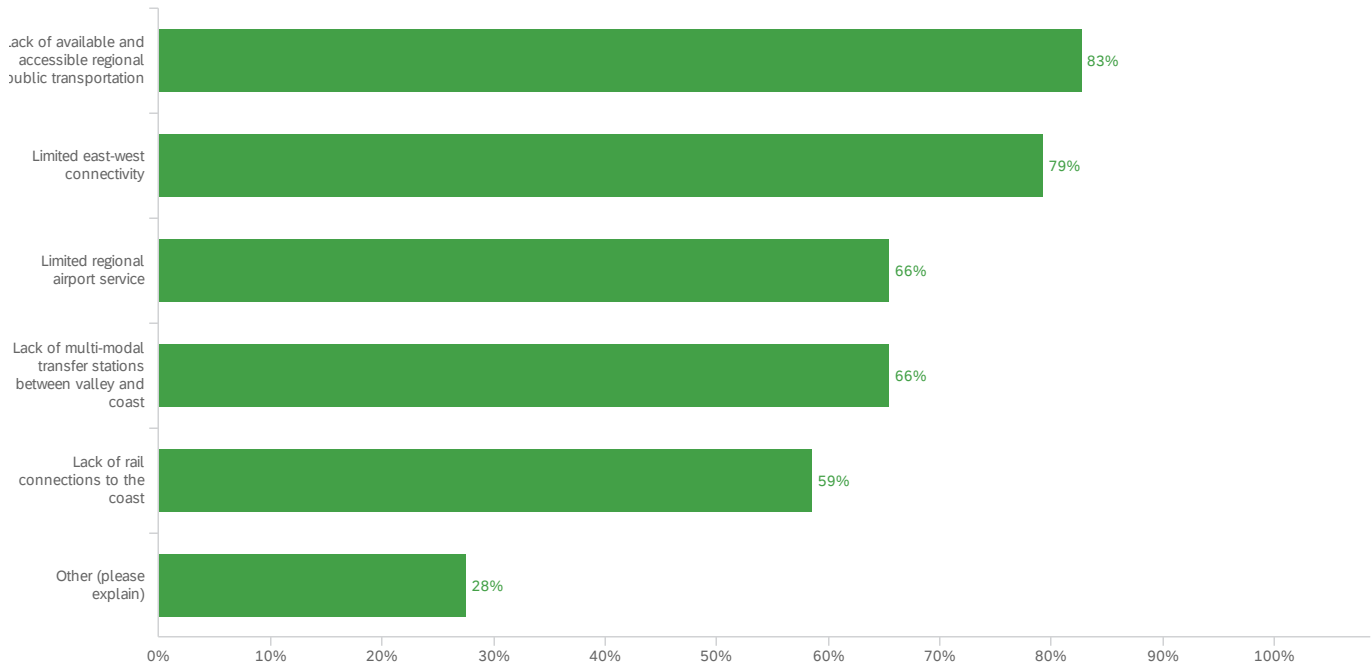
Lane County alone is the size of some US states, has 12 cities, and over 50 unincorporated communities. The "one-size fits all" approach does not work as evidenced by previous attempts.

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.

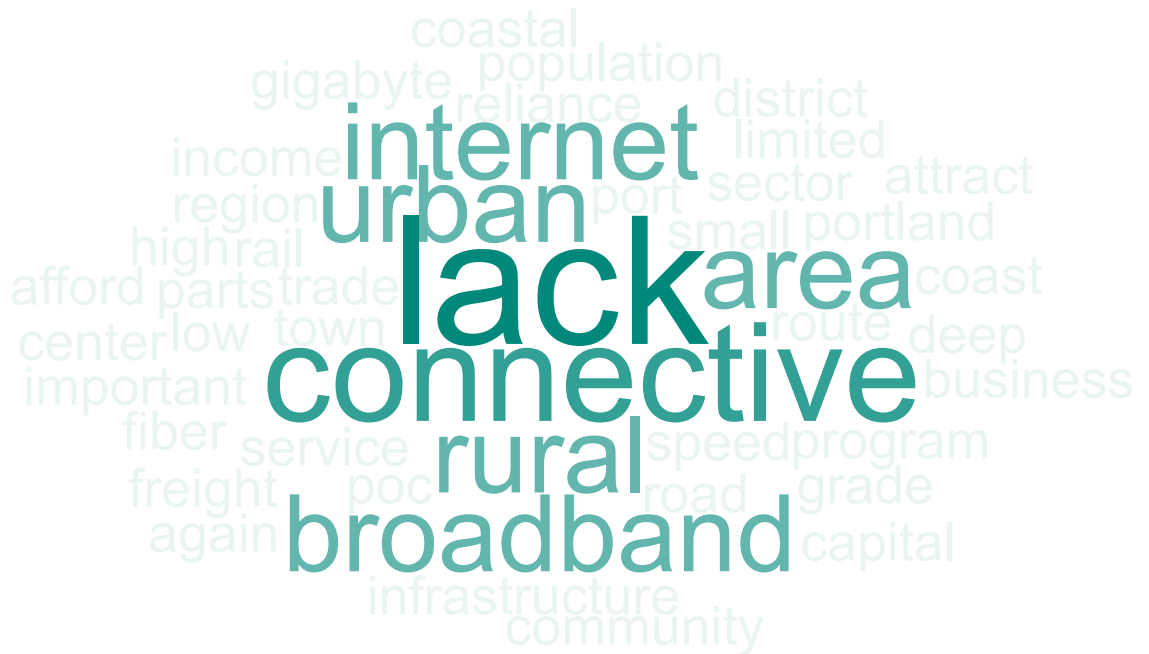


#	Field	Choice Count
4	Lack of available and accessible regional public transportation	22% 24
1	Limited east-west connectivity	21% 23
3	Limited regional airport service	17% 19
5	Lack of multi-modal transfer stations between valley and coast	17% 19
2	Lack of rail connections to the coast	15% 17
6	Other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

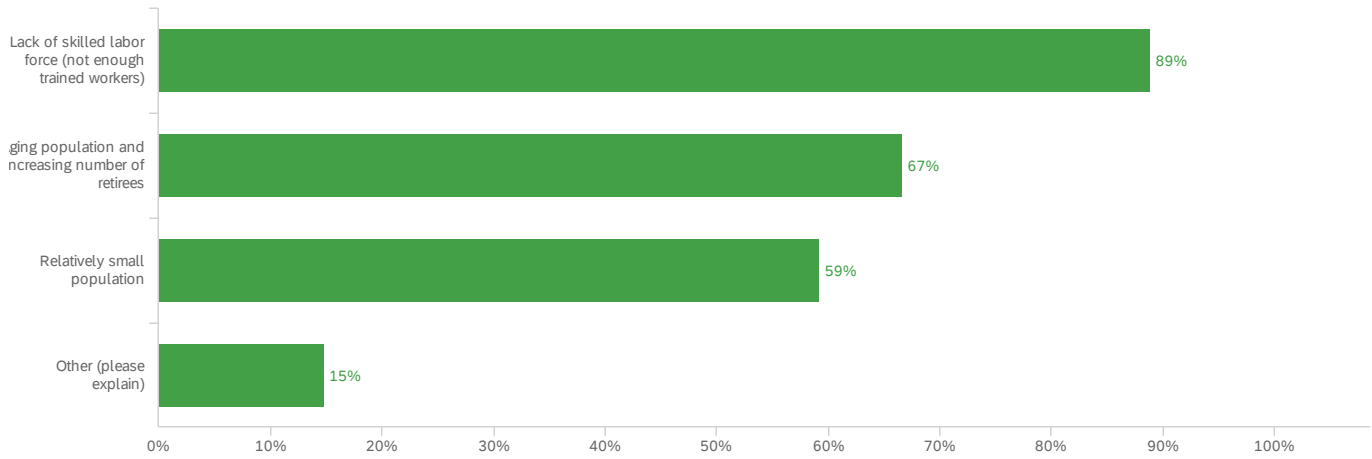
Lack of high-speed internet in many communities and districts.

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)

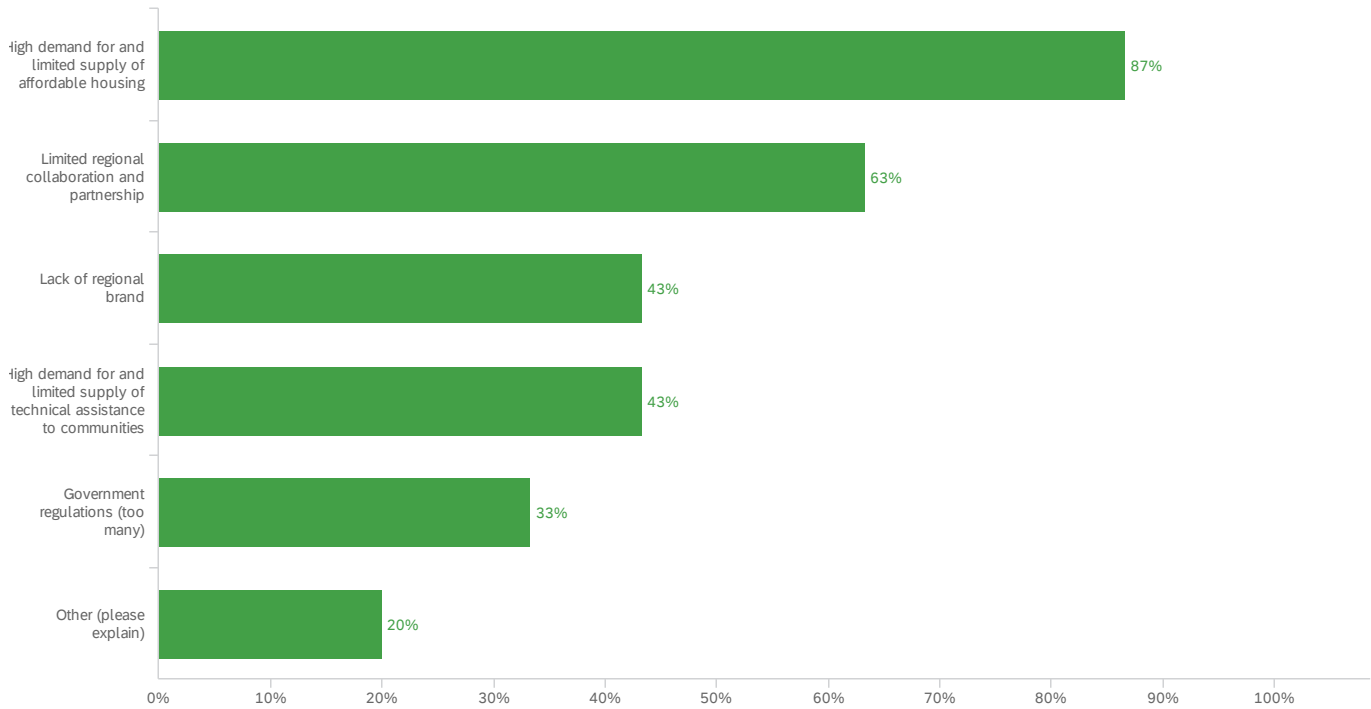
- Other (please explain)
- Lack of affordable housing making the central coast unattractive to workers.
- Region is racially homogeneous
- lack of diversity which inhibits attracting employees, losing employees to larger urban areas

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
-------	-------

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

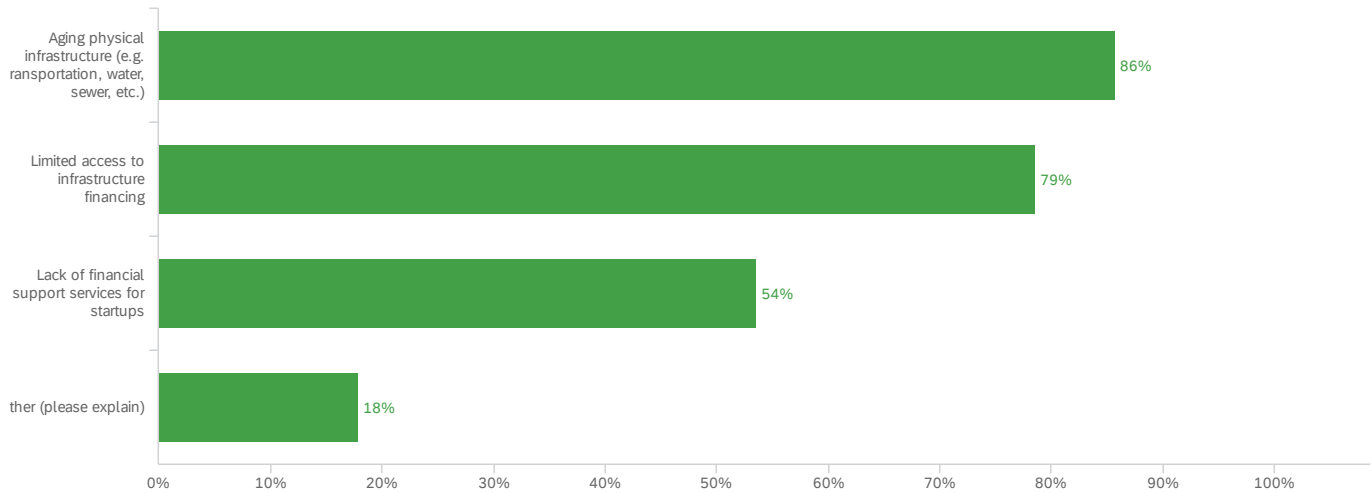
Cultural barriers

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.

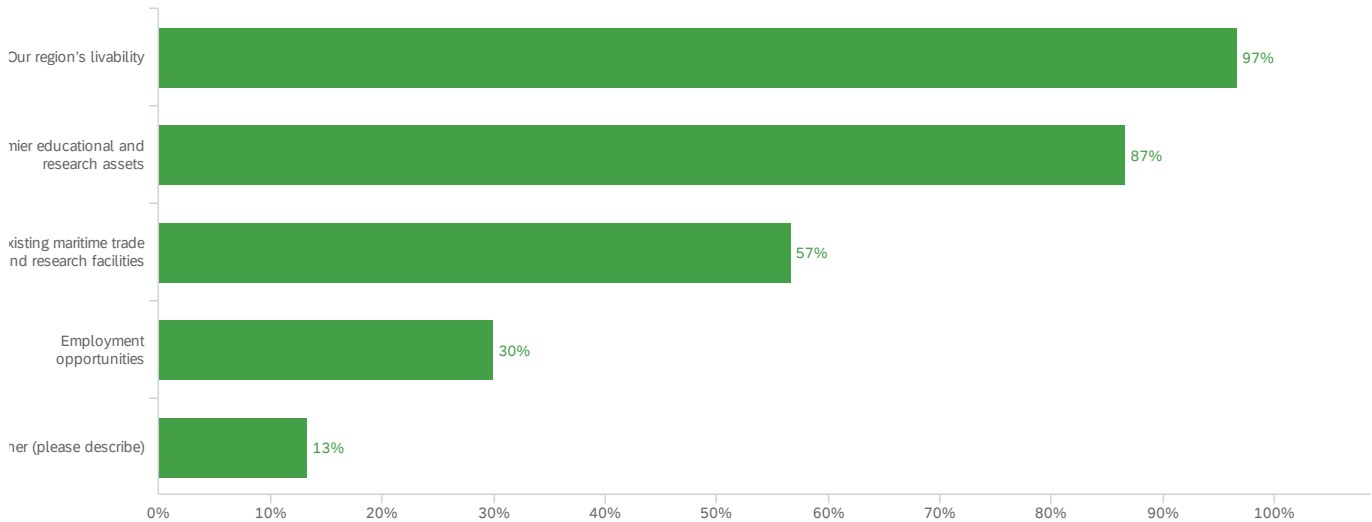
Lack of affordable, accessible childcare

"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

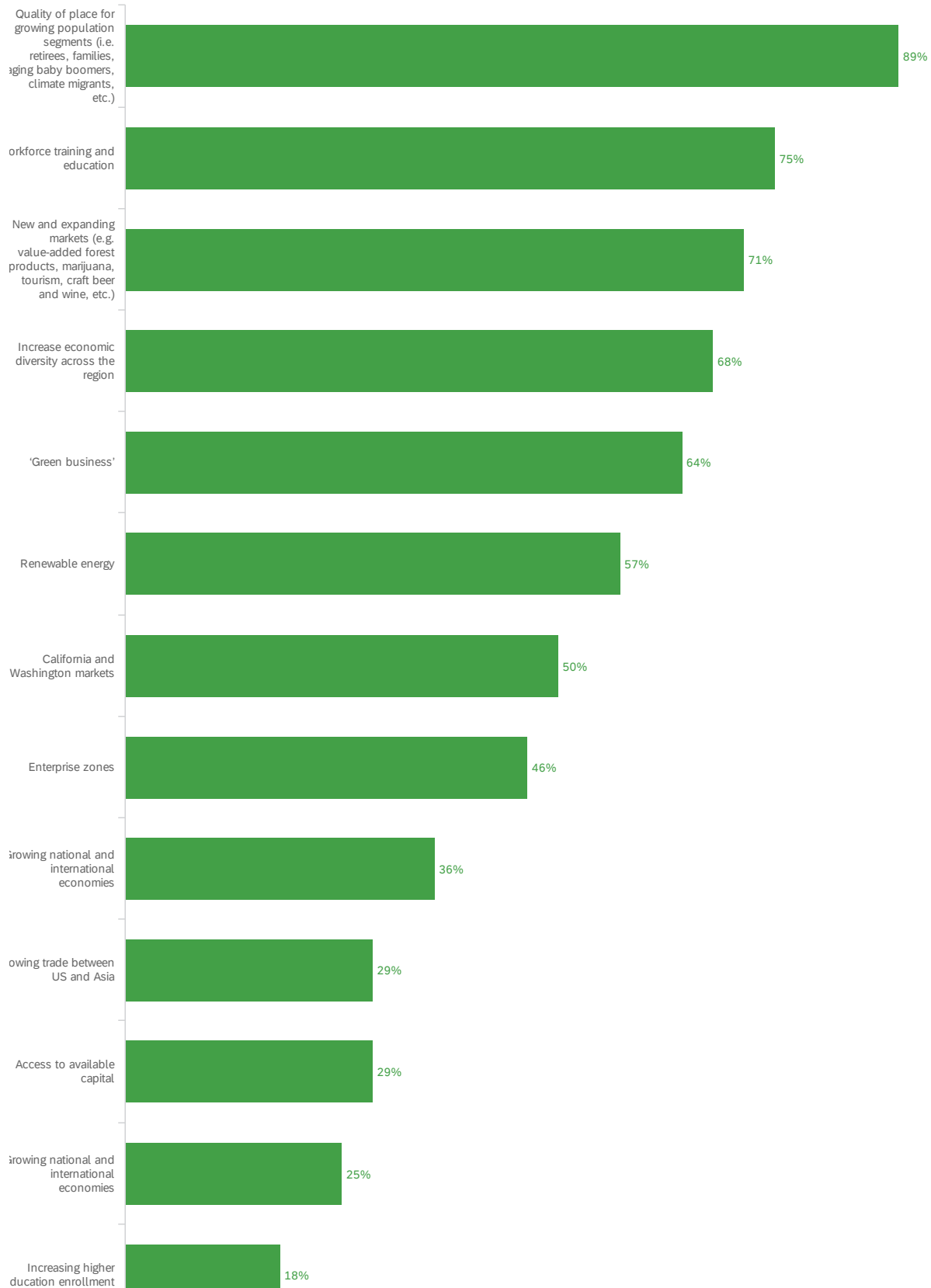
Other (please describe)

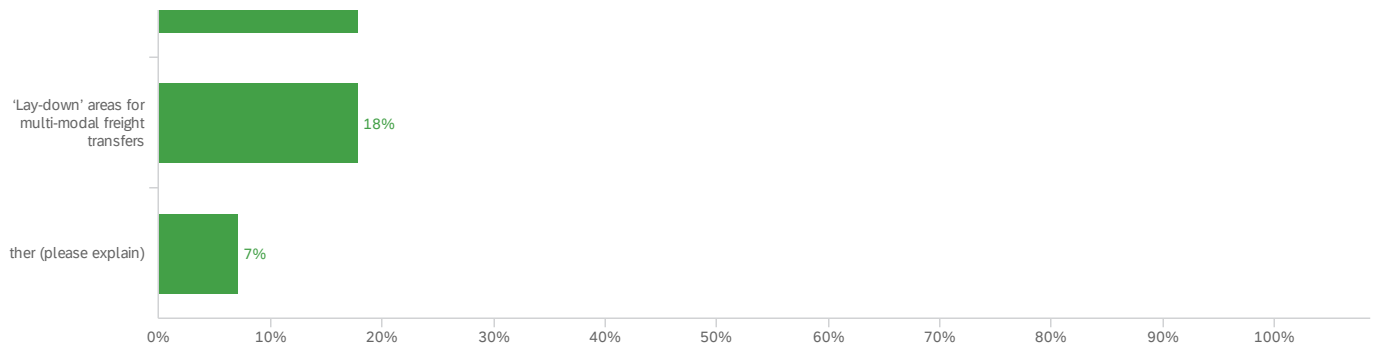
need to identify more trade and research facilities given we name maritime.

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...

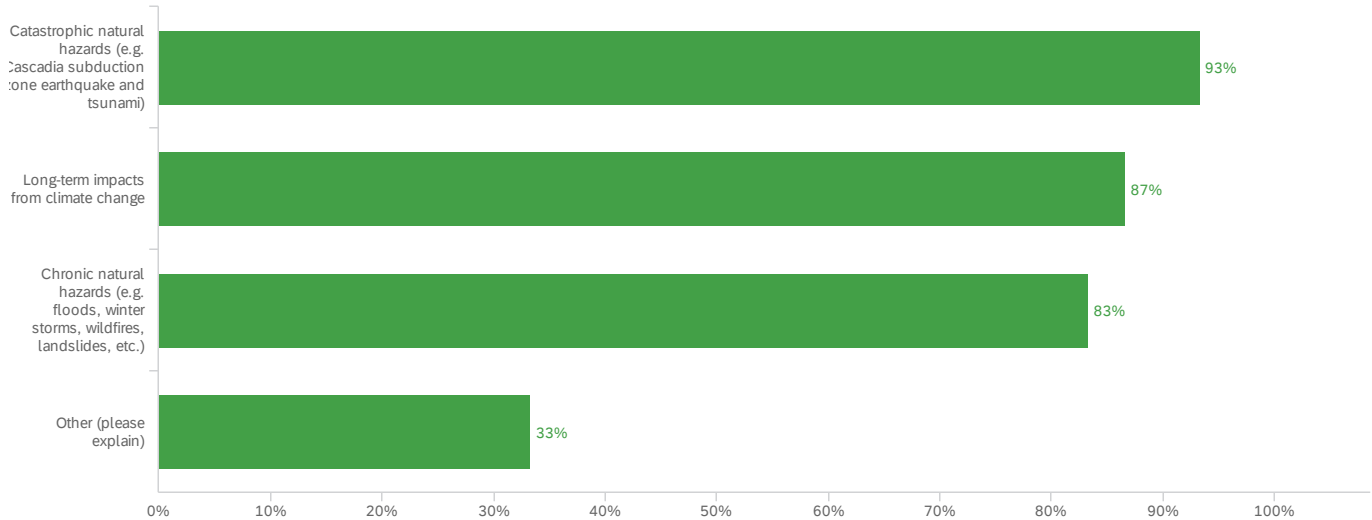
Multi-jurisdictional partnerships and relationships

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

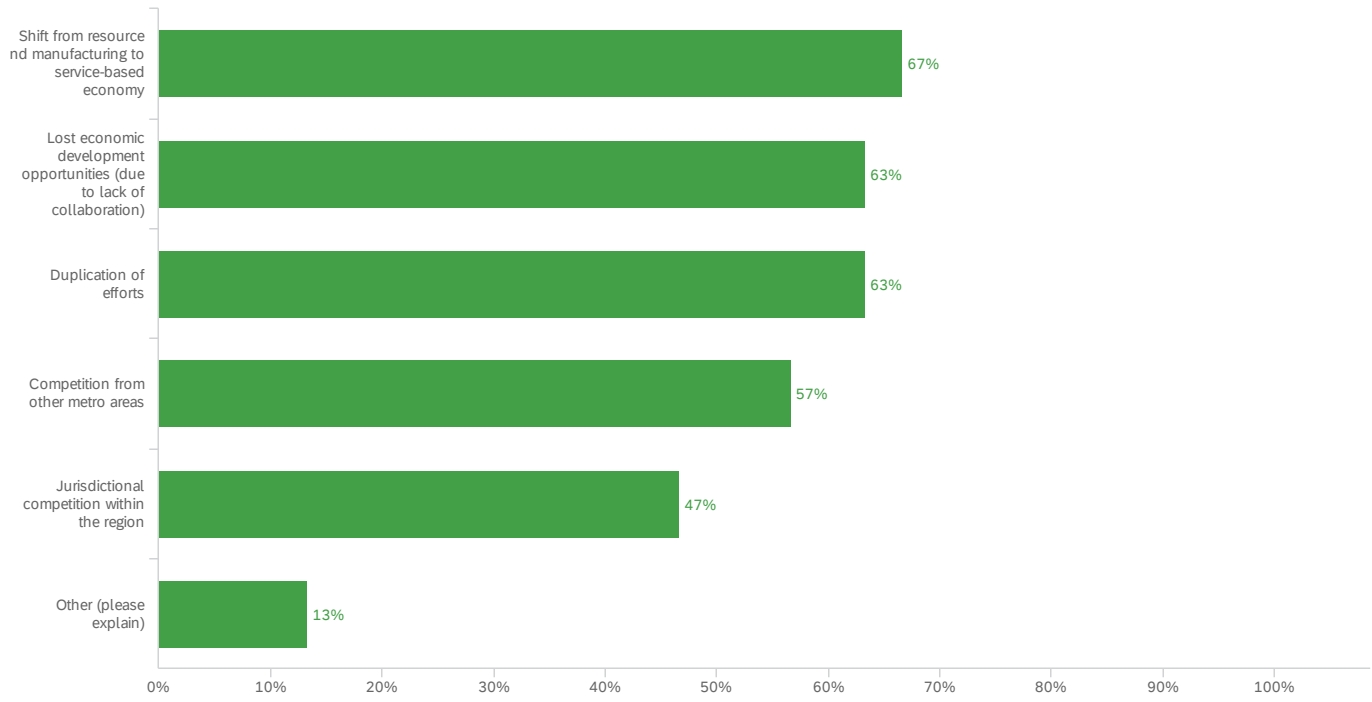
ongoing pandemic

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)

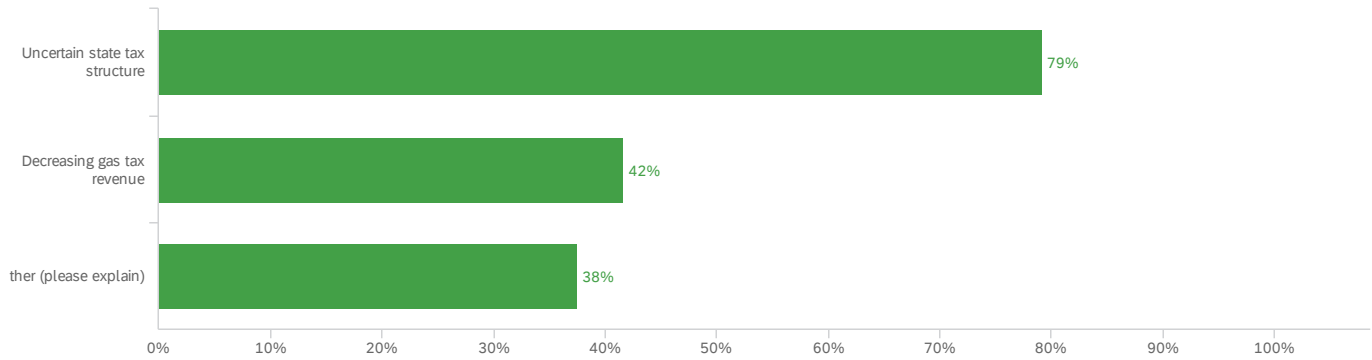
Over reliance on tech industry for economic stability. Unfriendly regulatory environment for manufacturing from the State.

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.

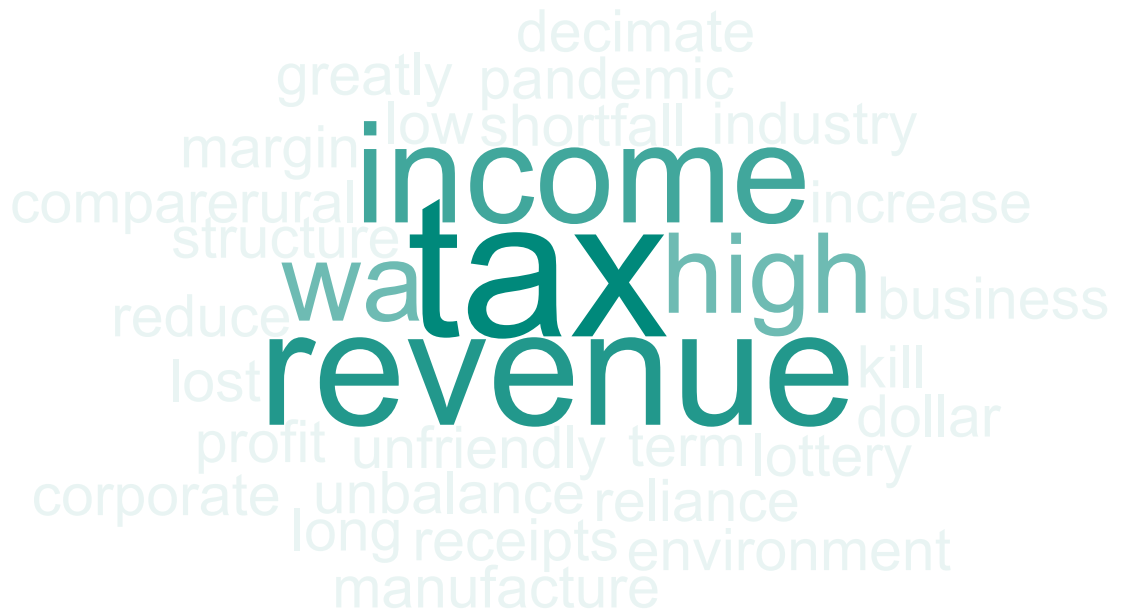


#	Field	Choice Count
2	Uncertain state tax structure	50% 19
1	Decreasing gas tax revenue	26% 10
3	Other (please explain)	24% 9
		38

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

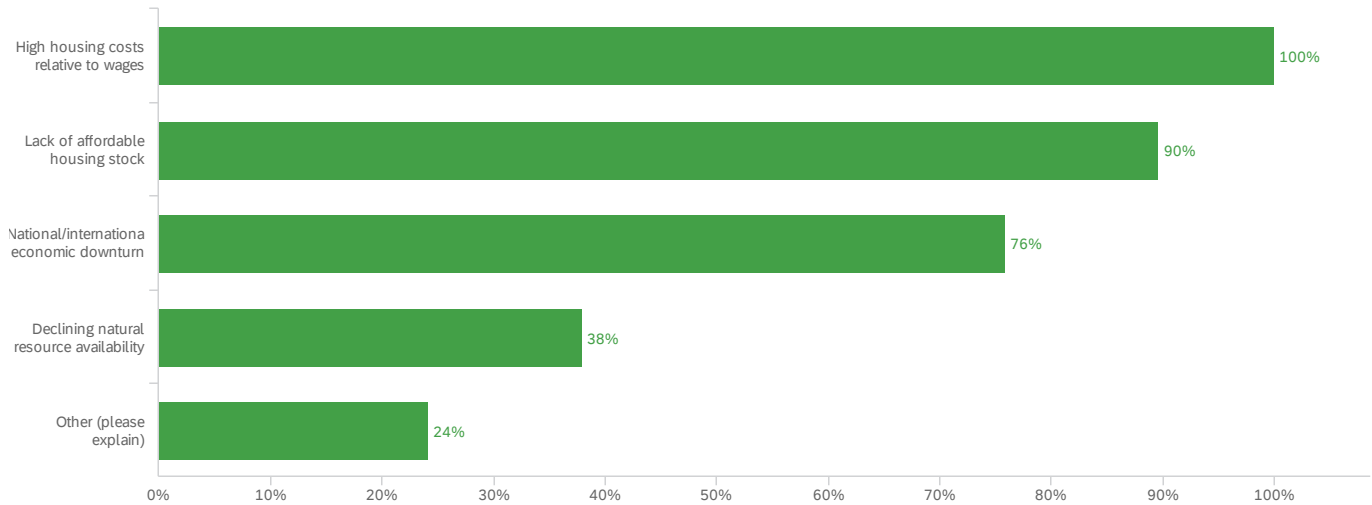
Decimated state revenue, lost lottery dollars

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

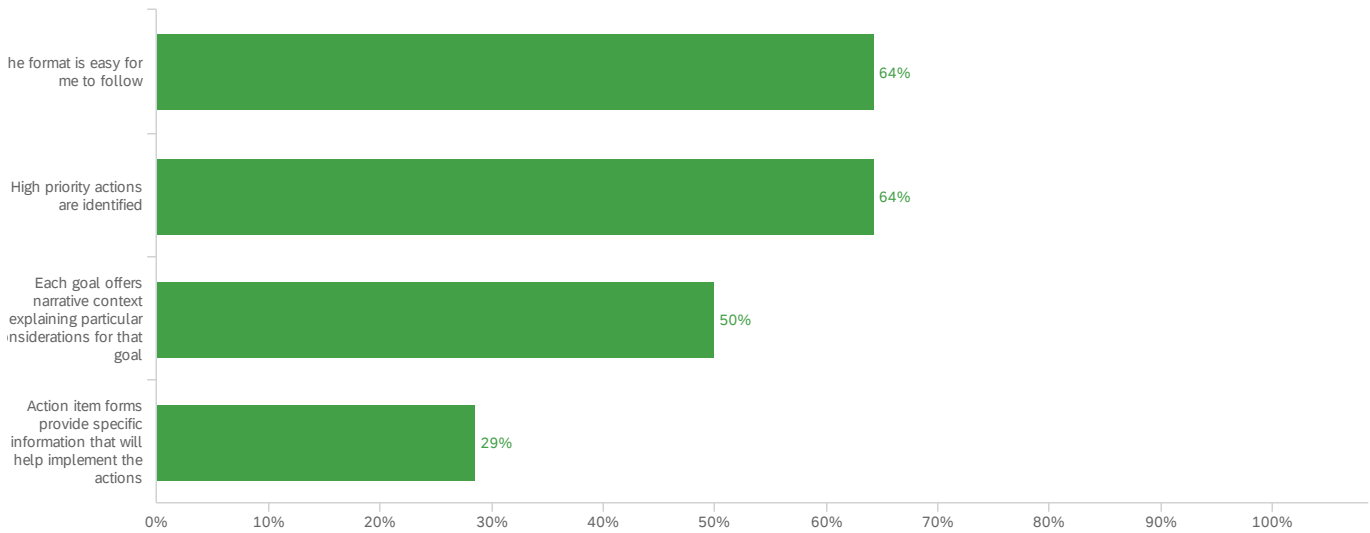
CWEDD CEDS 2020 - Actions Items

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.

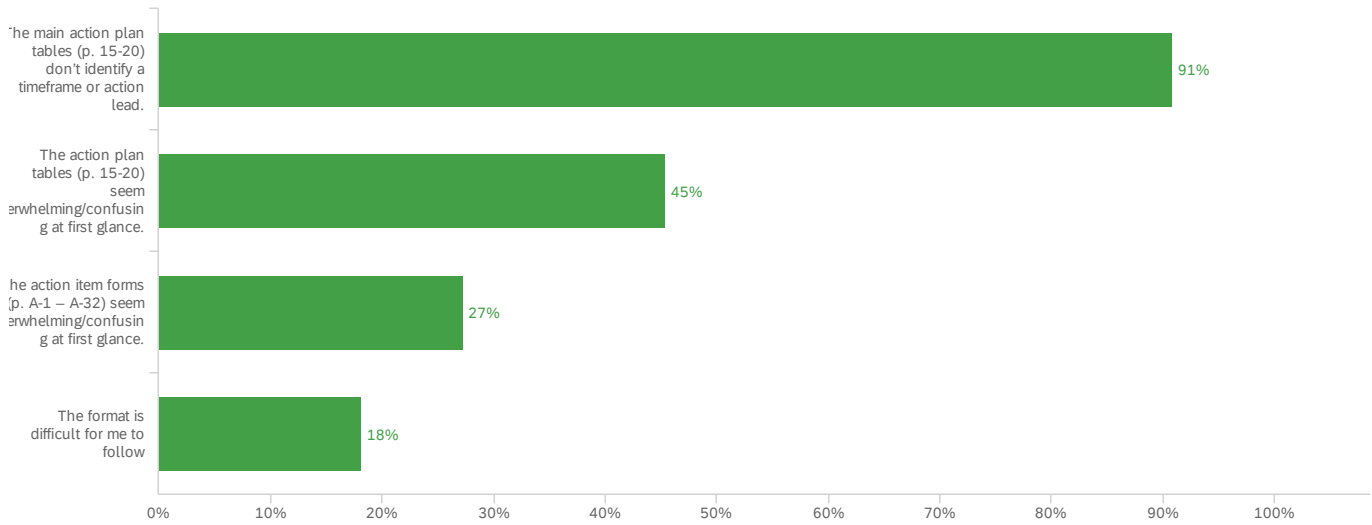
I didn't highlight any as I think we need more specificity in our initiative and then add the missing elements in who is responsible, timeline and metrics for success---all in a grid that will emphasize brevity and value engineering of direction

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...

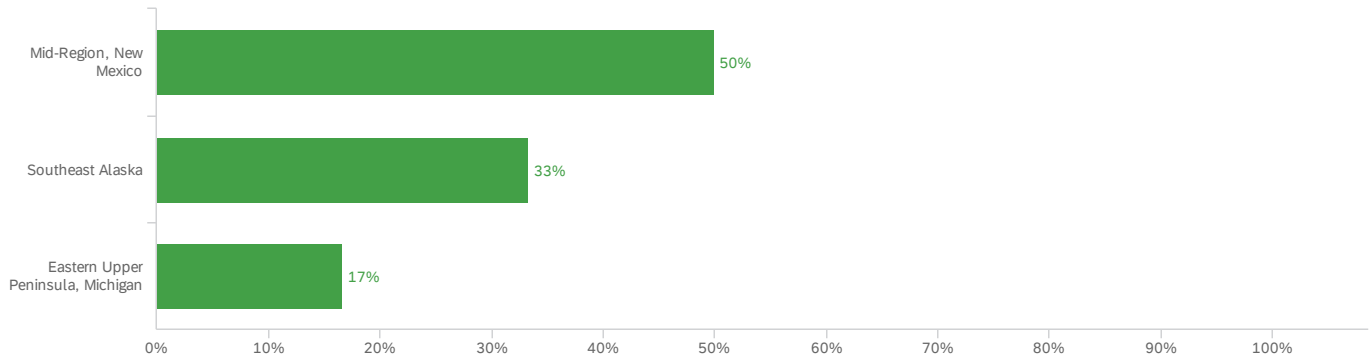
The CEDS is well organized and well written. Good job!

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



#	Field	Choice Count
5	Mid-Region, New Mexico	50% 6
6	Southeast Alaska	33% 4
4	Eastern Upper Peninsula, Michigan	17% 2
		12

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

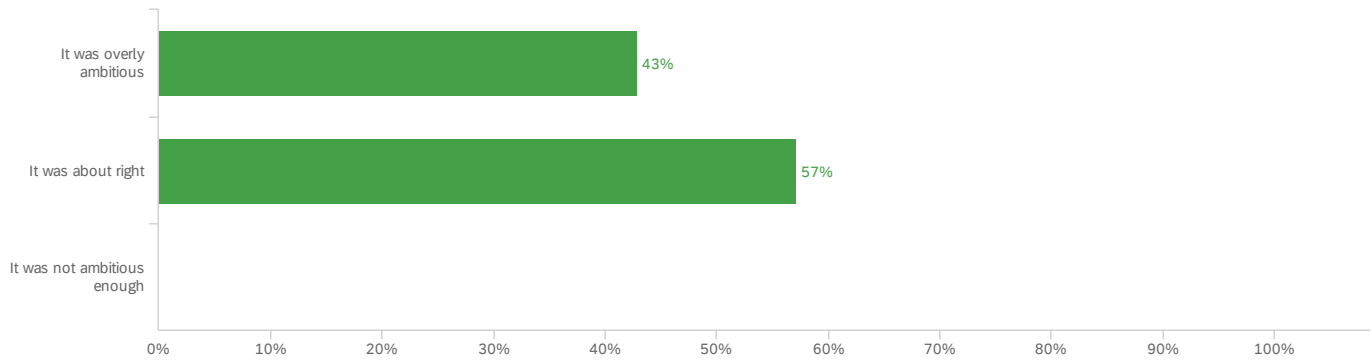
Easy to read. However, the Southeast Alaska one seems to have more data showing interesting and useful trends, the graphs were especially nice. I suggest a combination of these two.

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?

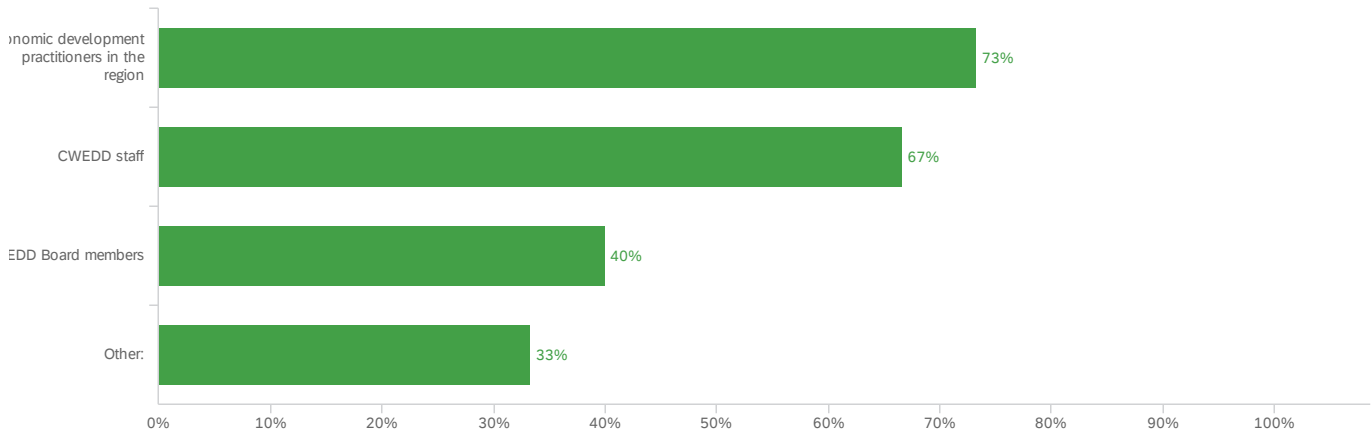


#	Field	Choice	Count
1	It was overly ambitious	43%	6
2	It was about right	57%	8
3	It was not ambitious enough	0%	0
			14

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

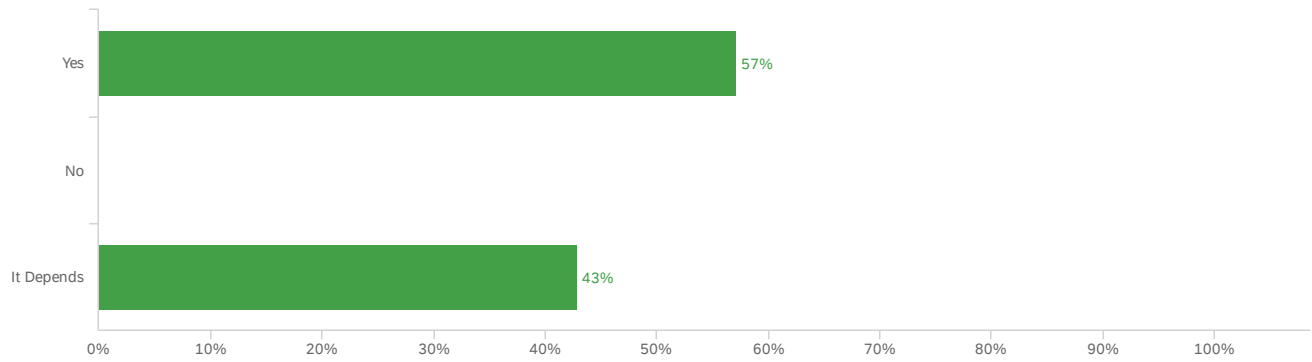
Other:

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?



#	Field	Choice	Count
1	Yes	57%	8
2	No	0%	0
3	It Depends	43%	6
			14

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

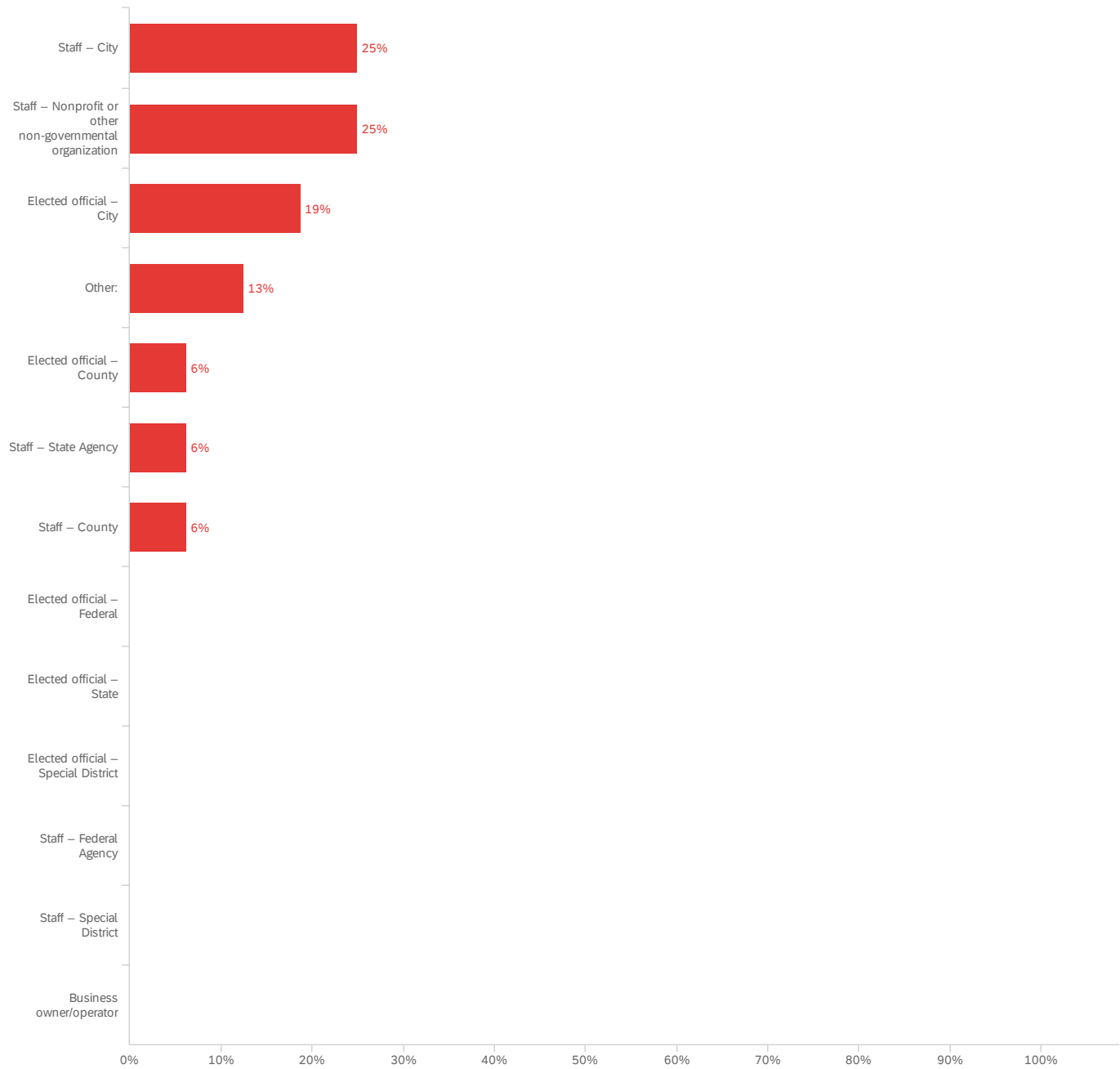
having specific goals ID'd

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

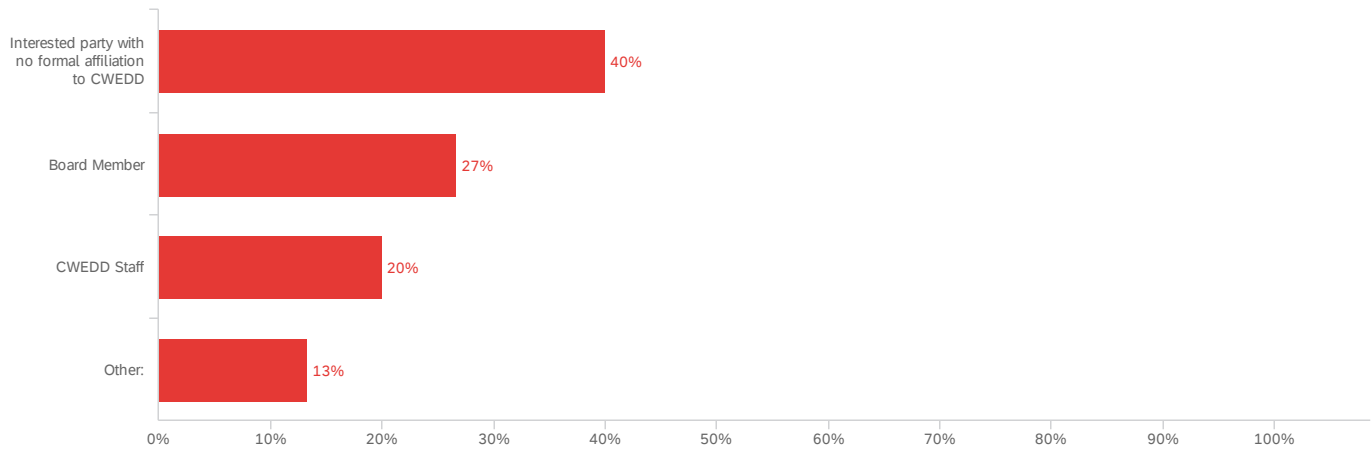
Q12_13_TEXT - Other:

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 Gantt 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.

<p>Key Partners</p> <p>[List primary players who will help implement strategies]</p>	<p>Targets</p> <p>[List desired outcomes/metrics for this goal]</p>
<p>Strategies</p> <p><i>What will guide regional economic development?</i></p>	<p>Branding Develop internal (within Cascades West Region) and external branding and marketing plan.</p> <p>Align tourism promotion with regional marketing strategy.</p> <p>Business Development Support the development of existing and new business.</p> <p>Adopt a business development strategy for businesses in target clusters.</p> <p>Encourage businesses to develop, test and implement continuity of operations plans.</p>
<p>Regional Collaboration</p> <p><i>Opportunities for regional collaboration</i></p>	<p>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</p>
<p>Resilience</p> <p><i>How will these strategies build regional resilience?</i></p>	<p>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”</p> <p>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</p>
<p>Equity & Inclusion</p> <p><i>How will these strategies build a more equitable and inclusive region?</i></p>	<p>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</p>

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...

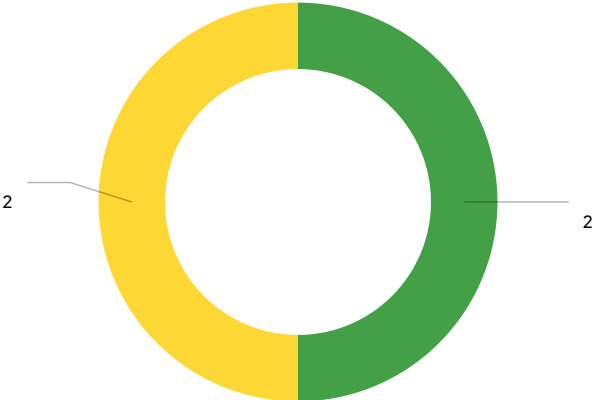
Very good overview - but I'd also like to see some way to address/include references or connections to more local planning efforts (closer to boots on the ground)

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?



■ Yes ■ No

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 includes three data appendices from the 2015 CEDS:

- **Part 1: Socioeconomic Profile** – Information about CWEDD’s demographics and economic sectors
- **Part 2: Community Resources** – Information about funding, government regulations, infrastructure, recreation, leisure, and historic assets, education assets, and health care assets.
- **Part 3: Natural Resources** – Information about the region’s land, water, and air.

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.

PART I: REGIONAL PROFILE

The purpose of this section is to highlight key demographic and economic characteristics and trends in the Cascade West Economic Development District (CWEDD) region. The regional profile provides context for economic development strategies and actions in the region and provides a deeper understanding of the challenges and opportunities of the CWEDD. The populations of the four counties in the CWEDD have much in common and the labor market of the region is increasingly inter-connected. However, there are some differences in the demographic make-up of each county in the region.

Population and Growth

Table B-1 shows historic and projected population for the four-county Cascades West region. Total population of the region was estimated at 614,140 in 2014 (PSU Population Center). Between 2000 and 2014 the population in the region grew by an estimated 65,480 people—an average annual growth rate of 0.9%. This rate of growth is marginally lower than the 0.9% annual average growth rate of the region from 2000-2010.

Table B-1. Population Estimates, Decennial Census Population Counts, and Average Annual Growth Rate (AAGR), 2000-2025

Region	Projection	Population Estimates		Census Population		Average Annual Growth Rate (AAGR)	
	2025	2014	2010	2000	2000 to 2010	2010 to 2014	2014 to 2025
Oregon	4,516,200	3,962,710	3,831,074	3,421,399	1.1%	0.9%	1.2%
EDD Region	677,500	614,140	600,000	548,660	0.9%	0.6%	0.9%
Benton	94,984	88,740	85,579	78,153	0.9%	0.9%	0.6%
Lane	394,921	358,805	351,715	322,959	0.9%	0.5%	0.9%
Lincoln	51,371	46,890	46,034	44,479	0.3%	0.5%	0.8%
Linn	136,224	119,705	116,672	103,069	1.3%	0.6%	1.2%

Source: U.S. Census Bureau, 2000 and 2010 Census; Portland State University Population Center

The rate of growth varied between the four counties of the region during the period of 2000-2014:

- Linn County was the fastest growing county during this period, with an annual average growth rate of 1.3%.
- Benton and Lane County were the next fastest growing counties in the region during this period, with an average growth of 0.9% per year.
- Lincoln County grew at an average of 0.3% per year during this period.

The region has continued to grow at a slower rate than the rest of the state. The total population of the region grew by 11.9%, between 2000 and 2014 compared to 15.8% statewide for the same period.

Population Trends

Growth projections through 2050 indicate that the region will continue to grow more slowly than the overall state, shown in Table B-2. The State of

Oregon Office of Economic Analysis, Department of Administrative Services (OEA) estimates that state population will grow by almost 58% by 2050, while the four county region will grow by only 41%, with the highest growth rate continuing to be in Lane County.

Table B-2. Population Projection, 2050

Region	2010	2050	Percent Growth
Oregon	3,837,300	5,588,500	46%
EDD Region	600,720	800,939	33%
Benton	85,735	111,666	30%
Lane	352,010	464,839	32%
Lincoln	46,135	56,245	22%
Linn	116,840	168,189	44%

Source: Oregon Office of Economic Analysis, Long-term County Population Forecast, 2010-2050.

The OEA forecasts that in the near term (2015 to 2030) the region will experience a noticeable increase in Average Annual Net migration rates. OEA expects these rates to taper from 2030 through 2050, but will remain slightly higher than current overall.

Urban/Rural Population

The population in the region is becoming increasingly concentrated in urban areas, although at a slower pace than Oregon as a whole. Table B-3 shows that in 2000, 79% of the state population resided in urban areas, and 76% of the CWEDD region resided in urban areas. In 2010, 81% of Oregon residents resided in urban areas, while 78% of regional residents did.

Table B-3. Urban and Rural Populations, 2000-2010

Region	Urban		Rural	
	2000	2010	2000	2010
Oregon	78.7%	81.0%	21.3%	19.0%
EDD Region	76.0%	78.0%	24.0%	22.0%
Benton	81.1%	81.2%	18.9%	18.8%
Lane	80.7%	82.5%	19.3%	17.5%
Lincoln	62.1%	62.4%	37.9%	37.6%
Linn	63.4%	68.4%	36.6%	31.6%

Source: U.S. Census Bureau, Decennial Census 2000 and 2010; P2 URBAN AND RURAL Universe: Total Population Summary File 1 (SF 1)

The four largest cities in the region of Eugene, Springfield, Corvallis, and Albany are driving regional growth. The combined growth of these cities was 17.0% from 2000 through 2014, compared with an 11.9% growth for the remainder of the region (PSU Population Research Center).

Race & Ethnicity

Table B-4 shows population by ethnicity in 2000 and 2013. Minorities (Black or African-American, American Indian, Asian, Pacific Islander, and Hispanic or Latino) accounted for nearly 16% of the population in the region in 2013. This rate compares with a little over 11% in 2000, and 7.1% in 1990. At the state level, the minority rates were 22.3% in 2013, 16.5% in 2000 (Census), and 11.2% in 1990 (Census).

Table B-4. Population by Ethnicity, 2000 to 2013.

Region	White, Not Hispanic		Minority		Hispanic		Not Hispanic	
	2000	2013	2000	2013	2000	2013	2000	2013
Oregon	83.5%	77.7%	16.5%	22.3%	8.0%	12.1%	92.0%	87.9%
EDD Region	88.8%	84.2%	11.2%	15.8%	4.6%	7.8%	95.4%	92.2%
Benton	86.8%	82.8%	13.2%	17.2%	4.7%	6.8%	95.3%	93.2%
Lane	88.6%	83.8%	11.4%	16.2%	4.6%	7.8%	95.4%	92.2%
Lincoln	88.3%	83.3%	11.7%	16.7%	4.8%	8.2%	95.2%	91.8%
Linn	91.2%	86.6%	8.8%	13.4%	4.4%	8.1%	91.2%	91.9%

Source: U.S. Census Bureau, American Community Survey 3 year estimates 2011-2013
DP05: ACS DEMOGRAPHIC AND HOUSING

Growth of Hispanic and Latino populations is accelerating. Hispanics and Latinos accounted for 1.9% of the regional population in 1980, 2.4% in 1990, and 4.5% of the regional population in 2000. As described above, 2013 Census estimates indicate that the Hispanic and Latino population had risen to 7.8% of the region.

Age and Gender

According to the U.S. Census (2013), 50.7% of the population in the region is female and 49.3% is male. The percentage of females is slightly higher in the region than in the state. Lincoln County and coastal Lane County have greater gender disparity, perhaps reflecting the growth of the coastal area as a retirement area.

Table B-5 shows that age patterns in the region are generally similar to those statewide. According to 2013 Census estimates, nearly one in five people in the region are under the age of 18 and 62.7% of the regional population is of working age (16-64 years). The region does have a slightly smaller percentage of pre-school age children (5.2% versus 6.1% for the state), and has a slightly higher percentage of population older than 65 (17.0% versus 15.5% for the state).

Table B-5. Population by Age and Gender, 2013

Region	Ages 0-17	Ages 18-64	Ages 65 and over	Male	Female
Oregon	22.1%	62.5%	15.4%	49.4%	50.6%
EDD Region	19.3%	62.7%	18.0%	49.3%	50.7%
Benton	17.3%	68.8%	14.0%	50.0%	50.0%
Lane	19.2%	63.9%	16.9%	49.1%	50.9%
Lincoln	17.0%	58.5%	24.4%	48.7%	51.3%
Linn	23.7%	59.5%	16.8%	49.3%	50.7%

Source: U.S. Census Bureau, American Community Survey 3 year estimates 2011-2013. DP05 ACS DEMOGRAPHIC AND HOUSING

The Office of Economic Analysis’s Projections to 2050 forecast that the retirement age population (people age 65 or over) will rise to 20% in both the region and the state. The percentage of school age population statewide is projected to drop by 16%, while it is projected to drop by only 6% at the regional level. Working age population is projected to drop to 56% statewide and to 53% in the region.

It is anticipated that areas of the region will experience these shifts differently. For instance, the increase of research positions related to OSU and NOAA in Lincoln County is expected to increase the number of young professionals attracted to that part of the region.

Income

The region continues to lag behind income levels for Oregon as a whole as well as the United States. Table B-6 shows the average covered wage per worker from 2011 to 2013 for all four counties and the state. Average covered wage in Lane County was 85% of the statewide average, 83% in Linn County, and 72% in Lincoln County.

Table B-6. Average Covered Wage (per worker), 2011-2013

Region	2011	2012	2013	% of Oregon (2013)
Oregon	\$43,077	\$44,229	\$45,008	100.0%
Benton	\$43,685	\$44,878	\$45,477	101.0%
Lane	\$36,777	\$37,617	\$38,353	85.2%
Lincoln	\$30,956	\$31,805	\$32,394	72.0%
Linn	\$36,227	\$36,987	\$37,381	83.1%

Source: State of Oregon Employment Department, Employment and Wages by Industry (QCEW)

Table B-7 shows select supplemental income and poverty indicators for 2013. Benton County has a relatively lower percentage of households with Social Security and higher percentage of population below the poverty level—a trend that is likely influenced by its large college student population. Lincoln

County's higher than average retirement age population appears to be reflected in data that shows a higher percentage of households receiving Social Security.

Table B-7. Supplemental Income and Poverty Indicators, 2013

	Oregon	Benton	Lane	Lincoln	Linn
Households with Social Security Income	31.6%	26.8%	33.1%	45.1%	36.4%
Households with Cash Public Assistance	3.9%	3.4%	3.6%	4.3%	4.5%
Households with Food Stamps	19.6%	13.6%	23.2%	21.0%	21.8%
Families Below Poverty Line	11.8%	9.8%	13.1%	11.3%	13.4%
Population Below Poverty Line	17.1%	23.8%	22.0%	16.8%	19.0%
Population Under 18 Below Poverty Line	22.6%	18.1%	25.2%	23.9%	28.4%

Source: U.S. Census Bureau, American Community Survey 3 year estimates 2011-2013
DP03: ACS SELECTED ECONOMIC CHARACTERISTICS

Educational Attainment

Testing measures show Benton County educational performance significantly exceeds other counties in the region, as well as statewide averages, seen in Table B-8. Lane County, on most measures, also exceeds statewide averages, whereas Lincoln and Linn Counties fall are below statewide averages for most measurements.

Table B-8. Performance Assessment, 2013-2014

Region	Math	Reading	Science	Writing
Oregon	62%	71%	66%	59%
Benton	72%	81%	78%	69%
Lane	60%	73%	65%	61%
Lincoln	50%	63%	57%	54%
Linn	58%	70%	66%	52%

Source: Oregon Department of Education, Performance Assessment 2013-2014

During the 2013-2014 school year, dropout rates in Benton (1.4%) County were significantly better than statewide averages (4.0%), while the Linn County dropout rate was just below state averages (at 3.8%). Lincoln County dropout rates significantly exceeded the statewide dropout rate at 4.71%. The dropout rate for Lane County (4%) was just over statewide averages.

Table B-9. Dropout Rates, 2013-2014

Region	Fall Enrollment	Dropout Count	Dropout Rate
Oregon	178,581	7,055	3.95%
Benton	2,998	42	1.40%
Lane	14,452	578	4.00%
Lincoln	1,592	75	4.71%
Linn	7,739	294	3.80%

Source: Oregon Department of Education, Dropout Table 2013-2014

The over age 25 populations of Benton, Lane and Lincoln Counties exceed state averages for attainment of Bachelor degrees or higher (see Table B-10). The populations in Benton and Lane Counties were both above the state average for high school graduation rates. In Linn and Lincoln Counties, 11% of the population over age 25 did not hold a high school or equivalent diploma, compared with only 5% of Benton County and 8.6% of Lane County.

Table B-10. Educational Attainment, 2013

Age 25+ Completing	Oregon	Benton	Lane	Lincoln	Linn
High school or Higher	89.6%	95.0%	91.4%	89.0%	89.0%
Bachelors or Higher	30.0%	51.5%	27.9%	24.6%	16.6%
No High School	10.4%	5.0%	8.6%	11.0%	11.0%

Source: U.S. Census Bureau, 2011-2013 3-Year American Community Survey

Economy

Traditionally, 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.

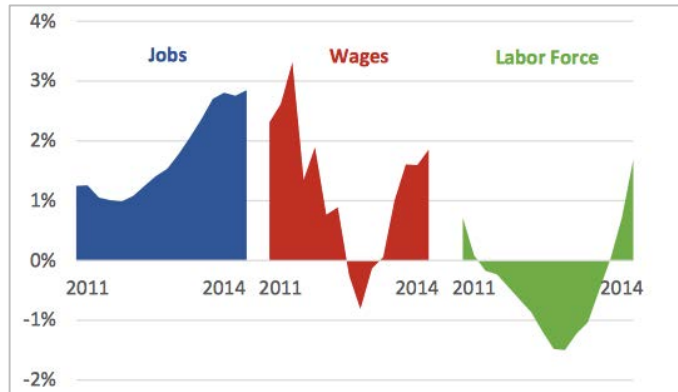
During the 1980s, many of the region's natural resource-based businesses faced significant structural changes and began contracting. While the entire region was impacted by this shift, many of the region's rural communities suffered severe hardships, as their relatively narrow natural resource-based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

As the region's natural resource-based businesses began contracting, the location and start-up of new traded sector industries, such as high tech and software, worked to provide economic diversity and stability. The availability of university research and graduates, a good quality of life, and business development support helped to attract and grow businesses in these new sectors. However, the benefits of this economic growth and diversification were primarily focused along the I-5 corridor in the region's larger cities.

The growth generated in the new sectors of the region's economy has not been strong enough to cover the losses registered in the traditional sectors. A

challenge for the region is how to accelerate growth in emerging industries and clusters and, at the same time, support the traditional ones that still have not recovered their pre-recession status in terms of number of jobs and wage levels. For more specific information about Oregon’s current economic situation, refer to OEA’s Economic Review and Forecast (<http://www.oregon.gov/DAS/OEA/docs/economic/oregon.pdf>)

Figure B-I. Oregon Labor Market Dynamics, 2011-2014



Year-over-year change, 6 month average. Wages are inflation-adjusted QCEW wages. Source: BEA, OED, Oregon office of Economic Analysis

With respect to indicators, OEA’s Economic Review and Forecast report presents a mixed assessment. On the positive side, “Currently, five major industries, which account for 40 percent of statewide jobs, are at all-time highs. Private sector education, health, and food manufacturing never really suffered recessionary losses – although their growth did slow during the recession. Professional and business services and leisure and hospitality have each regained all of their losses and are leading growth today.” The report goes on to say: “Both of the Oregon-specific composite leading indicators, along with U.S. leading indicators, are signaling continued economic growth.” However, the report also indicates the several indicators (e.g. housing starts, industrial production, etc.) have flipped and are trending down. The Cascades West region, while registering steady recovery on all indicators, has not recovered at the same speed as some other parts of the state. The slower recovery rate registered in Oregon’s non-metro areas impacted considerably the Cascades West region.

Employment and Unemployment

The following unemployment information was provided by the Oregon Employment Department at qualityinfo.org. All data is seasonally adjusted.

Benton County (Corvallis MSA) typically enjoys one of the lowest unemployment rates in Oregon, with an annual average unemployment rate of 7.7% in 2009. Benton’s March 2015 rate has reached 4.4%, in line with the average of the three years before the latest recession.

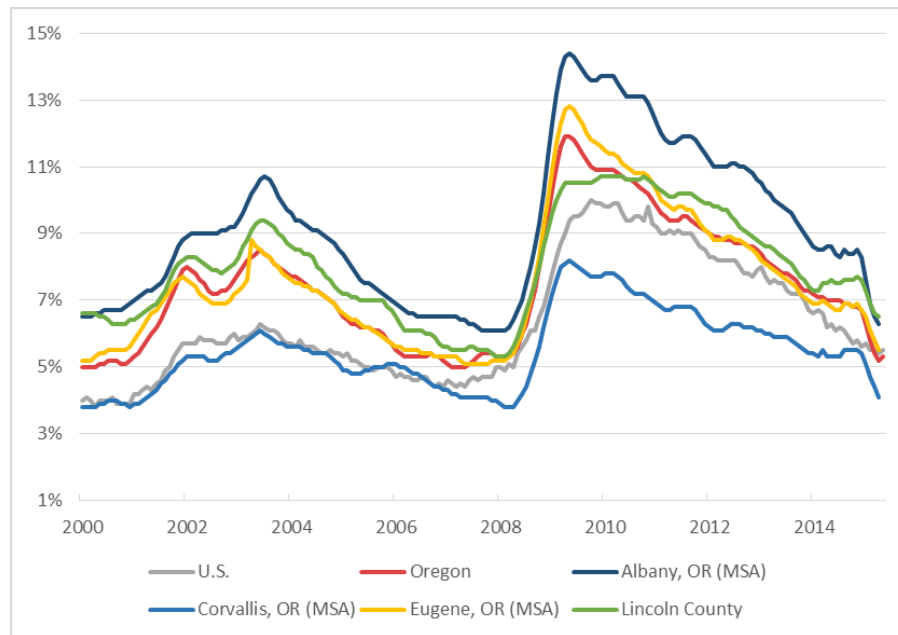
Lane County (Eugene MSA) unemployment data is typically closely tied with that of the State, with annual average unemployment rates of 6.6% and 6.4%

respectively. March 2009 saw Lane County’s rate climb to its highest level of the year at 13.5%. Since then, the unemployment rate has dropped to 5.8%, which is close to Oregon’s 5.4% both for March 2015.

Lincoln County annual unemployment rates have historically exceeded those of the U.S. by more than 1%. However, during the summer months since 2006, the differences have been less than 1%. Lincoln County did exceed the U.S. rate by 3% in March 2009. The difference has dropped by it is still over 1% above the rates registered for the US and for Oregon. In 2014, the average unemployment rate for Lincoln was 8.0%. On March 2015, Lincoln County registered a rate of 6.6%.

Linn County (Albany MSA) unemployment rates historically exceed national rates by 1% or more. In 2009 the unemployment rate reached 13.7%. There were 2,340 fewer nonfarm jobs in Linn County in January 2010 than in January 2009. The average rate for 2014 was 8.5%, but recent data indicates a faster reduction in unemployment. On March 2015, Linn County’s unemployment was at 6.5%, the lowest for the month since 2008.

Figure B-2. Unemployment in Cascades West Region, 2000-2015

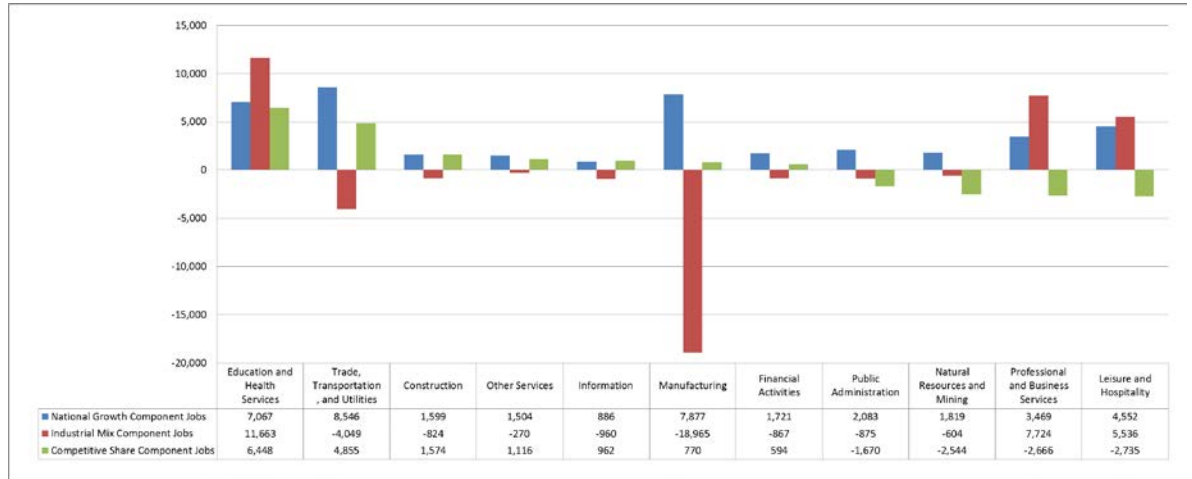


Source: Oregon Employment Department, Qualityinfo.org

Shift-Share Analysis

The purpose of a shift-share analysis is to allocate the change in employment to three categories: growth influenced by national growth; growth that is related to the regional industrial mix; and growth that is due to regional competitiveness. Following is a shift-share analysis for the Cascades West region based on the U.S. Bureau of Labor Statistics' Census of Employment and Wages data for 1990 and 2013.

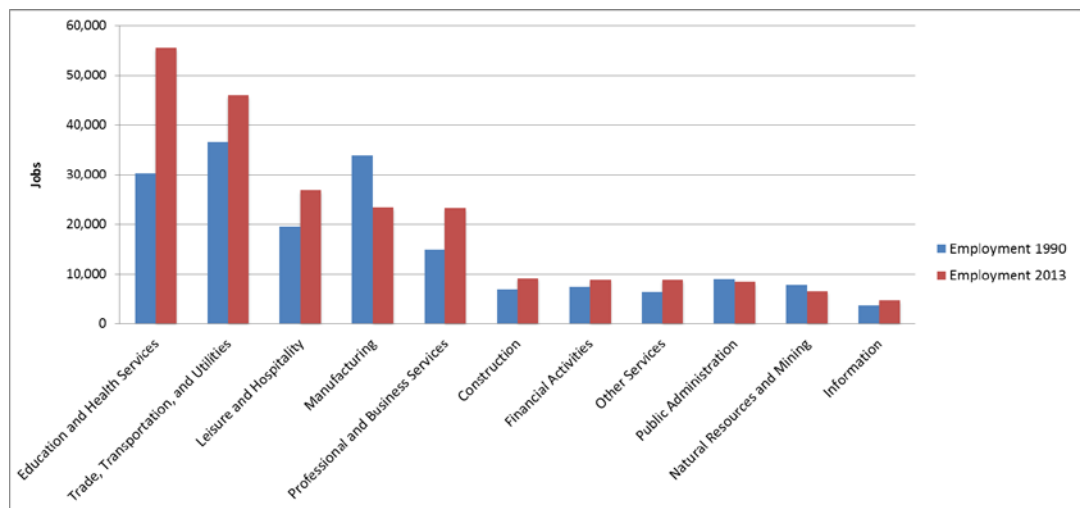
Figure B-3. Shift-Share Analysis for the Cascades West Region, 1990-2013.



During the period 1990 to 2013, employment in the Cascades West region increased by 45,334 jobs. In terms of employment growth, the most important industry was Education and Health Services (25,177 jobs). It is followed by Trade, Transportation, and Utilities (9,352 jobs), and Professional and Business Services (8,527 jobs).

During the time period 1990 to 2013, total employment in the region grew 25% while the nation's employment grew by 23.3%. As reported in Figure B-4, this region's biggest employer—Education and Health Services—had the highest national growth component. The 23.3% national growth component, which measures how the national economy change in a given period, led to this sector's employment growing by 7,067 jobs. In sum, the national growth component was responsible for a total of 41,123 jobs in this 4 county area as shown in Figure B-5.

Figure B-4. Employment Change in the Cascades West Region, 1990-2013



Source: Bureau of Labor Statics - High-Level Aggregates according to the NAICS 2002 system

Some local leaders try to make their economy more resilient by attracting more employment in government, military and education, as these sectors experience less fluctuation because they are not directly related to business cycles. As demonstrated in Figure B-4, the gains in the Education and Health sectors compensated for losses in sector such as manufacturing.

The industrial mix component measures how well an industry has grown, discounting the changes in the national economy. The highest industrial mix component was 51.9% in the Professional and Business Services sector, and it was responsible for 7,724 jobs. If the region's employment was concentrated in sectors with higher industrial mix components, then the area could expect more employment growth. However, the industrial mix component was responsible for decreasing the area's employment by -2,491 jobs. It confirms that the area has a concentration of employment in industries that are decreasing nation-wide, in terms of employment. The majority of these lost jobs can be attributed to decreases in the Manufacturing sector.

The third and final component of shift-share analysis is called the competitive share. It is the remaining employment change after accounting for the national and industrial mix components. If a sector's competitive share is positive, then the sector has a local advantage in promoting employment growth.

For example, the Education and Health Services sector employment grew by 83%. Of this 83%, 23.3% was due to the national growth component and 38.4% was due to the industrial mix. This leaves 21.3% that is attributable to the local conditions facing this economic sector. For the Education and Health Services sector, the competitive share resulted in 6,448 new jobs.

The top three sectors in competitive share were Education and Health Services, Trade, Transportation, and Utilities, and the Construction sector. Across all sectors, the competitive share component totals to 6,704 jobs. This indicates that the area is competitive in securing additional employment.

When the competitive share component for a region is positive, it indicates that the region has a productive advantage. Such advantage can be attributed to intensive use of technology, better management practices, access to expanded markets, or the local higher productivity and/or lower wages for the local workforce. A negative competitive share component can be the result of local disadvantages in all these areas.

Local officials can use the results of a shift-share analysis to identify the industries that have more potential for job growth. It can also be used to identify which industries have competitive advantages over other counties and regions. This information is essential in the development of strategies to improve local conditions faced by particular industries selected for focus.

Regional Economic Sectors

This section presents the industry sectors that have been the primary source of employment in the Cascades West region. Most activities are directly

related to the natural resources available in the region such as forestry, fishing, agriculture and tourism. Manufacturing, especially in metalworking, recent high tech industry and government employment complete the list. The data used is based on the cluster classification available at clustermapping.us except where noted otherwise.

Forest Products

The forest products industry remains vital to the region. This sector fueled the economy through much of the 19th Century and well into the 20th. More recently, it's been battered by economic recession and timber supply reduction. In response, the industry has become more efficient with larger, more technologically advanced mills that can process a wider range of raw material. The industry has also become more diverse, with a shift toward secondary wood products. Today, it is able to better handle the cyclic slumps and price swings that plague much of the manufacturing sector.

Every counties of the region has employment in the forest products sector. Regionally, employment in this sector declined from 2,771 jobs in 1998 to 2,274 jobs in 2012. However, the loss of 497 jobs was less than the expected loss of 941 jobs based on national trends for the period. Continued technological advances will likely make the industry less labor intensive.

A second traditional cluster, directly related to forestry, is Wood Products manufacturing. Two of its subclusters concentrate most of the employment in this sector. In Wood Processing, employment fell from 3,256 in 1998 to 1,850 in 2012. The loss of 823 jobs was below the expected loss of 1,327 jobs based on national trends for the sector. In Wood Components and products, the loss of 1,850 jobs was above the expected change of less 1,686 jobs. Employment in this sub cluster fell from 4,802 jobs in 1998 to 2,723 jobs in 2012.

Table B-11 Forestry Employment

Cluster Name	Employment		Change	Expected Change
	1998	2012		
Forestry	2771	2274	-497	-941

Source: U.S. Cluster Mapping Project (<http://clustermapping.us/>), Institute for Strategy and Competitiveness, Harvard Business School. Data Sources (<http://clustermapping.us/content/data-sources-and-limitations>)

Table B-12. Wood Products Employment

Cluster Name	Employment		Change	Expected Change
	1998	2012		
Prefabricated Wood Building	70	20	-50	-33
Wood Processing	3,256	2,433	-823	-1,327
Wood Components and Products	4,802	2,952	-1,850	-1,686
Totals	8,128	5,405	-2,723	-3,047

Source: U.S. Cluster Mapping Project (<http://clustermapping.us/>), Institute for Strategy and Competitiveness, Harvard Business School. Data Sources (<http://clustermapping.us/content/data-sources-and-limitations>)

Fishing

Fisheries employment in the region is primarily in coastal Lincoln County, which responds for 99% of all landed value for this sector. Aside from a small number of jobs in aquaculture – primarily oysters – fisheries employment is in commercial fishing for wild finfish and shellfish. Employment seems to fluctuate with harvests but has no clear increasing or decreasing trend, although accurate counts are difficult to make. Oregon’s 1999 legislation excused most fishermen from unemployment insurance coverage – the primary source of employment data. In 2011, 328 jobs were registered in the sector.

Fishermen face consolidation in the fish-processing industry, which reduces the number of viable ports; price competition from the aquaculture industry, which encourages the substitution of capital for labor to increase productivity; and increasing regulation on harvests. The Pacific Fishery Management Council has declared several species of ground fish over fished and restricted harvests to rebuild their stocks. These restrictions will probably continue.

Agriculture

Agriculture has long been a dominant and visible sector of the Willamette Valley economy. The region’s agricultural production includes a variety of field crops as well as livestock and poultry production.

Table B-13. Agricultural Employment Estimates, 2014

County	Employment
Oregon	56,500
EDD Region	6,080
Benton County	1,020
Lane County	2,120
Lincoln County	220
Linn County	2,720

**Statewide figure does not add Columbia County wide

Source: Qualityinfo.org, 2014 Oregon Agricultural Employment estimates

Linn County has the most agricultural employment of the four counties in the region. Agricultural employment grew from 2,390 jobs in 2008 to 2,720 jobs in 2014. Gross farm sales totaled \$291 million in 2008 and over \$391 million in 2013 (QualityInfo.org, n.d.). Linn County, also known as, “the grass seed capital of the world”, is not so subtle about the county’s largest crop. Linn County produced nearly one-third of the perennial ryegrass statewide in 2008. Nearly half of Linn County’s gross farm sales in 2008 were from grass and

legume seed. In 2013, farm seeds and legumes gross sales totaled \$118 million, a reduction to about 30% of total farm sales (QualityInfo.org, n.d.).

Lane County is the second largest agricultural producer in the region; gross farm sales in the county were just less than half (\$139 million) of Linn County's gross sales. Lane County's agriculture industry is a bit more diverse than Linn County, only 18% of the county's gross farm sales are from grass and legume seed. Lane County's top commodities in 2004 were farm forest products, cattle, other hay, and dairy products. In 2014, Lane County's annual agriculture employment was 2,120 slightly down from 2,140 in 2008.

Benton County had \$109 million in gross farm sales. Benton County produces a number of commodities. Benton's largest commodities are tall fescue, dairy products, annual ryegrass, and orchard grass. Benton County's annual agriculture employment in 2014 was 1,020 up from 930 in 2008.

Lincoln County has the smallest agriculture sector of the four counties in the region. In 2008, Lincoln County had an annual agricultural employment level of 240. The county's gross farm sales were just under \$11 million in 2008. The county's largest commodities in 2008 were farm forest products and cattle. Farm employment in Lincoln County fell to 220 in 2014.

In 2014, the regional average annual wage for crop production was \$28,697. It is above the average for the State of Oregon, which was \$28,697 in 2014. For animal production the average wage in the region was \$27,191, below the statewide average of \$32,342 (Qualityinfo.org).

High Tech

The high-tech sector is made up of computer and electronics manufacturing and of computer systems design, software and related services. In computer and electronic products manufacturing, the region has 42 production units. Lane County has 20 units employing 583, Benton has 15 units employing 521, and Linn County employs 151 in 7 production units. In 2014, average wages were well below that of the state. In the same year, Oregon's average annual salary for this sector was \$122,881. Lane County registered an annual average of \$74,506 and Linn County \$40,538 (Qualityinfo.org).

Software publishing in the state of Oregon has been growing since 2004. Employment was stable during the latest recession, but started growing again since 2012. The Cascades west region registered growth above was expected based on national trends between 1998 and 2012 (Clustermapping.us). In 2014, the region had 272 publishing units, employing 4,576. Average annual salaries ranged from \$67,491 in Benton County to 39,054 in Lincoln County. Lane County has the largest number of employees in this sector with 3,413 people and an annual average salary of \$59,897. The average salary in this sector for the state of Oregon was 70,640 in 2014 (Qualityinfo.org). Two of the larger software publishers are Symantec in Springfield and Tripod Data Systems in Corvallis.

Table B-14. Employment in High Tech

Cluster Name	Employment			Expected Change
	1998	2012	Change	
Software Publishers	874	1,597	723	352
Process and Laboratory Instruments	220	295	75	-59
Medical Apparatus	10	60	50	2
Electronic Components	385	150	-235	-201
Software Reproducing	560		-560	-398
Semiconductors	750	10	-740	-428
Computers and Peripherals	8,350	1,900	-6,450	-6,082
Totals	11,149	4,012	-7,137	-6,814

Source: U.S. Cluster Mapping Project (<http://clustermapping.us/>), Institute for Strategy and Competitiveness, Harvard Business School. Data Sources (<http://clustermapping.us/content/data-sources-and-limitations>)

The closure of several large employers in the region account for the significant decrease in “Computers and Peripherals” employment. The Computer and Peripherals category includes photocopying equipment manufacturing, computer terminal manufacturing and other computer peripheral equipment manufacturing among others. Hynix Semiconductor closed in 2008 accounting for the loss of roughly 1,400 jobs and ranked as one of Oregon’s biggest layoffs of the 2000s. Employment losses at Sony, Hewlett-Packard and other high tech companies also contributed to the employment decline.

Hospitality and Tourism

Tourism is economically important in all four counties of the region. Estimating tourism-related employment is difficult because tourism is not an industry proper, but a source of customers. Tables Table B-15 and Table B-16 show the impact of visitor spending as they vary between the counties. Two industries in the region strongly affected by tourism are arts, entertainment and recreation and accommodation and food services, referred to collectively here as the leisure and hospitality industry.

Table B-15. Visitor Industry Impacts, Cascades West EDD, 2014

	Visitor Spending	Total Travel Spending	Employment	Earnings	Local Taxes	State Taxes
EDD Region	\$ 1,323,400,000	\$ 1,609,000,000	18,830	\$ 411,400,000	\$ 23,900,000	\$ 40,700,000
Benton	100,100,000	115,600,000	1,510	29,200,000	1,500,000	3,500,000
Lane	609,900,000	849,500,000	9,770	218,600,000	10,500,000	20,600,000
Lincoln	496,200,000	507,300,000	5,920	133,900,000	11,000,000	12,400,000
Linn	117,200,000	136,600,000	1,630	29,700,000	900,000	4,200,000

Source: Dean Runyan and Associates, Oregon Travel Impacts, 1991-2014
http://www.deanrunyan.com/doc_library/ORImp.pdf

Table B-16. Visitor Spending by Industry Sector, Cascades West EDD, 2014

	Accommodations	Food Service	Food Stores	Local Trans/Gas	Arts, Ent, Rec	Retail Sales
EDD Region	\$ 284,900,000	\$ 373,100,000	\$ 137,100,000	\$157,100,000	\$ 177,800,000	\$ 193,500,000
Benton	18,700,000	29,500,000	10,500,000	12,800,000	13,000,000	15,600,000
Lane	112,300,000	179,500,000	65,200,000	76,000,000	83,200,000	93,700,000
Lincoln	138,600,000	129,000,000	46,100,000	53,600,000	64,900,000	64,000,000
Linn	15,300,000	35,100,000	15,300,000	14,700,000	16,700,000	20,200,000

Source: Dean Runyan and Associates, Oregon Travel Impacts, 1991-2014
http://www.deanrunyan.com/doc_library/ORImp.pdf

Leisure and hospitality is relatively more important in Lincoln County than the overall region because of tourism activities related to the Oregon Coast. In 2012, Lincoln County 2,664 people were employed in tourism related activity, representing 42% all of such employment in the region. Average annual wages in the accommodations sub sector was \$18,596 in 2014. It is higher than the state of Oregon’s average of \$17,796 for the same period (Qualityinfo.org). The low covered wage reflects the prevalence of part-time and seasonal work, use of tip income to augment covered wages, low skill and low training requirements, and the apparent increasing use of recent immigrants, who may lack the education, language skills or work history to command higher wages.

Table B-17. Tourism Employment

Cluster Name	Employment			Expected Change
	1998	2012	Change	
Accommodations and Related Services	3,462	4,309	847	457
Tourism Related Services	532	585	53	-122
Spectator Sports	70	60	-10	25
Other Tourism Attractions	317	291	-26	63
Gambling Facilities	830	780	-50	-55
Amusement Parks and Arcades	80	11	-69	12
Cultural and Educational Entertainment	381	294	-87	116
Totals	5,672	6,330	658	496

Source: U.S. Cluster Mapping Project (<http://clustermapping.us/>), Institute for Strategy and Competitiveness, Harvard Business School. Data Sources (<http://clustermapping.us/content/data-sources-and-limitations>)

Employment in leisure and hospitality is expected to grow faster than the average in the region – about 12.1% from 2008 to 2018. Growth will be fueled by the continuing expansion of demand for services in the U.S. economy, increasing travel as the baby-boom generation enters retirement, casino expansions, and Oregon’s tourism marketing. Some of this growth can also be attributed to the rapid growth in track events in Eugene, including the U.S. Olympic Trials. In 2003, the Oregon Legislature passed House Bill 2267 establishing a state lodging tax. The tax is one-percent of the fee charged to the customer for overnight lodging. This tax dramatically increased spending

on marketing in some counties – more than a 10-fold increase in Lincoln County – and led to more collaborative marketing between the state’s regions and industries.

Metals Manufacturing

The region’s metal manufacturing sector is concentrated in Linn and Lane Counties. Linn County is responsible for nearly all of the primary metals employment in the region and Lane County comprises the majority of fabricated metals employment in the region.

Linn County makes up nearly all of the region’s primary metal manufacturing, employing 1,761 people. This figure is down from 2,100 employees in the sector in 2008. Linn County accounted for 21% of primary metal manufacturing employment statewide in 2014.

Wages in primary metal manufacturing are significantly higher than the average wage across all industries in the region. The average annual wage in primary metal manufacturing was \$69,905, 98% higher than the \$37,599 annual average for all employment in Linn County in 2014 (Qualityinfo.org).

Fabricated metal manufacturing is a slightly smaller industry than primary metals, employing 1,540 in the region during 2014. Lane County made up 64% of the region’s employment in the industry. Linn County comprised 30% of the region’s employment while Benton and Lincoln Counties made up the small remainder. The average annual wage in fabricated metals was \$50,689 for Linn County and \$39,389 for Lane County (Qualityinfo.org).

Table B-18. Metals Manufacturing Employment

Cluster Name	Employment			Expected Change
	1998	2012	Change	
Fasteners	70	140	70	1
Machine Tools and Accessories	60	70	10	-27
Metal Processing	395	120	-275	-68
Metalworking Machinery	575	150	-425	-241
Total	1,100	480	-620	-335

Source: U.S. Cluster Mapping Project (<http://clustermapping.us/>), Institute for Strategy and Competitiveness, Harvard Business School. Data Sources (<http://clustermapping.us/content/data-sources-and-limitations>)

Government

Public sector employment is very significant in the region. Statewide, public sector employment makes up about 17% of total nonfarm employment. In the region, public sector employment accounts for 18% of the total nonfarm employment.

State government is the sector where the region differs significantly from the statewide pattern. The biggest reason for this is that the State’s two largest

universities are both located in the region. Oregon State University and the University of Oregon are the largest employers in their respective counties.

Average annual covered wages for government workers in the region varied from \$53,794 in Benton County, \$46,685 in Lane County, \$43,665 in Lincoln County, and \$38,164 in Linn County. Statewide average annual wages in 2014 was \$49,835 (Qualityinfo.org).

Economic Clusters

The region has 34 traded clusters, according to the classification adopted by Cluster Mapping US. Employment data for these clusters help to understand the sectors with more potential to impact to overall economy if they experience growth or decline. For example, wood products, an industry that has experienced steady decline over the years, is still the second most important traded cluster in the region. As this industry is expected to continue contracting, the overall growth rate for the region will be impacted negatively. The data presented below refers to private employment only.

The following narratives on potential business clusters that could be important to the region’s economic future were prepared based on data available on clustermapping.us. It includes six traded clusters and one local cluster. At the end of this section, we present employment data for the seven traded clusters and three local clusters that have registered decline between 1998 and 2013.

Education

Education and research is the cluster that added more jobs to the region’s economy between 1998 and 2012. This sector added 1,161 jobs between 1998 and 2012. This number is well above the expected 761 new jobs based on sector trends. Research organizations and educational support services are sub-clusters with highest rate of change.

Table B-19. Education Employment

Cluster Name	Employment			Expected Change
	1998	2012	Change	
Educational Support Services	55	454	399	92
Research Organizations	621	978	357	768
Colleges, Universities, and Professional Schools	175	445	270	69
Professional Organizations	75	166	91	9
Training Programs	407	451	44	299
Totals	1,333	2,494	1,161	761

Source: U.S. Cluster Mapping Project (<http://clustermapping.us/>), Institute for Strategy and Competitiveness, Harvard Business School. Data Sources (<http://clustermapping.us/content/data-sources-and-limitations>)

Distribution and Electronic Commerce

Distribution and Electronic Commerce registered the creation of 1,132 between 1998 and 2012. This is above the expected change of 776 jobs. The sector employed 8,244 people in 2012.

Business Services

This cluster includes computer services, consulting, engineering, human resources, corporate headquarters, passenger transportation, architectural and drafting services, and general business support services. This cluster registered the creation of 906 jobs while the expected change based on national trends was 2,950 new jobs, three times the growth registered in the region. In 2012, employment in this sector totaled 9,129.

Table B-20. Business Services Employment

Cluster Name	Employment			Expected Change
	1998	2012	Change	
Computer Services	1,009	1,302	293	624
Consulting Services	301	563	262	149
Engineering Services	1,255	1,414	159	187
Employment Placement Services	377	495	118	136
Corporate Headquarters	2,575	2,649	74	207
Ground Passenger Transportation	121	174	53	8
Architectural and Drafting Services	310	287	-23	-44
Business Support Services	2,275	2,245	-30	1,670
Totals	8,223	9,129	906	2,938

Source: U.S. Cluster Mapping Project (<http://clustermapping.us/>), Institute for Strategy and Competitiveness, Harvard Business School. Data Sources (<http://clustermapping.us/content/data-sources-and-limitations>)

Direct Market Foods

Local foods movement, including the USDA's promotion of "Know Your Farmer, Know Your Food", encourages local food production and local sale of foods produced. Consideration of transportation impacts are just part of the equation that is increasingly encouraging purchase of foods closer to where we reside.

Direct market sales offer farmers, fishermen, and other food producers' opportunities to increase their revenue. Options to sell directly to customers instead of to wholesalers are made possible through farmers' and fishermen's markets, you-pick operations, community-supported agriculture (CSA), farm stands, mail order and Internet sales, and sales to restaurants and stores.

Food Processing

The dominant role that food processing played in the region's economy has declined in recent decades. However, there are indications that the foods processing industry may return in other forms.

Regionalized production centers appear to, again, be becoming cost-effective, primarily due to rising transportation costs. Inquiries by major food producers indicate that we may soon see a shift of some food manufacturing operations away from their current national production centers locations and back into the region.

Value-added foods opportunities surround many of the food stuffs produced in the region. Small manufacturing enterprises have developed markets for high-end seafood, specialty salsas, flavoring oils, and a host of other unique food products. Of special note are new systems that allow the base food, such as a fish, to be tracked from the catch to the restaurant table.

Entrepreneurship development efforts currently in the planning stage will focus on starting new food processing businesses and helping emerging processors to stabilize and expand their operations.

Table B-21. Food Processing Employment

Cluster Name	Employment		Change	Expected Change
	1998	2012		
Farm Wholesalers	20	295	275	-2
Wineries	60	202	142	47
Specialty Foods and Ingredients	107	210	103	12
Dairy Products	235	333	98	9
Animal Foods	80	130	50	2
Coffee and Tea	10	24	14	1
Malt Beverages	140	140	0	-28
Packaged Fruit and Vegetables	630	630	0	-84
Candy and Chocolate	110	110	0	-24
Baked Goods	231	215	-16	-8
Soft Drinks and Ice	245	30	-215	-53
Totals	1,868	2,319	451	-129

Source: U.S. Cluster Mapping Project (<http://clustermapping.us/>), Institute for Strategy and Competitiveness, Harvard Business School. Data Sources (<http://clustermapping.us/content/data-sources-and-limitations>)

Insurance Services

Insurance Services employment rose well above the expected changes. This sector registered the creation of 358 jobs while the expected change was a decrease of 70 jobs. Total employment in the sector was 1,021 by 2011. While small, the positive change in employment in this sector helped reduce the impact of losses on other important traded clusters.

Table B-22. Employment in Insurance Services

Cluster Name	Employment		Change	Expected Change
	1998	2012		
Insurance Carriers	630	990	360	-63
Insurance Related Services	33	31	-2	-9
Totals	663	1,021	358	-72

Source: U.S. Cluster Mapping Project (<http://clustermapping.us/>), Institute for Strategy and Competitiveness, Harvard Business School. Data Sources (<http://clustermapping.us/content/data-sources-and-limitations>)

Health Care

A cluster of activities related to human health services, facilities, research, and products is forming in the region. Work to develop a bio-science consortia has helped to articulate and strengthen the region's cluster of manufacturers producing pharmaceutical and other medical products. The expansion and development of health care facilities includes the new College of Osteopathic Medicine and a new veterans' home.

The employment created in the local health cluster was superior to all losses registered in the local clusters. Employment in local health services rose from 22,417 jobs in 1998 to 32,928 in 2012. The added 10,511 jobs almost doubled the expected 5,548 new jobs in the sector.

Table B-23. Employment in Local Health Cluster

Cluster Name	Employment		Change	Expected Change
	1998	2012		
Hospitals	6,255	11,550	5,295	825
Home and Residential Care	5,863	8,557	2,694	1,868
Healthcare Provider Offices	8,079	10,378	2,299	3,357
Medical Laboratories	703	1,284	581	338
Medical Equipment Distribution and Rental	30	70	40	47
Optical Goods Retailing	172	152	-20	-4
Funeral Service and Crematories	307	209	-98	-56
Drug Stores	1,008	728	-280	-21
Totals	22,417	32,928	10,511	6,353

Source: U.S. Cluster Mapping Project (<http://clustermapping.us/>), Institute for Strategy and Competitiveness, Harvard Business School. Data Sources (<http://clustermapping.us/content/data-sources-and-limitations>)

Declining Clusters

The region has seen a decline in the following clusters in recent years:

- **Information Technology and Analytical Instruments.** This cluster lost 7,412 jobs while a loss of 4,023 was expected. The sector had 11,149 jobs in 1998, but registered only 3,737 jobs in 2012.

- **Wood Products**, a traditional industry in the region lost 3002 jobs, above the expected loss of 2,964 jobs. With over 8,000 jobs it is the second most important traded cluster in the region.
- **Paper and Packaging** employment has reduced to half of what it was before the recession.
- **Trailer, Motor Homes & Appliances** losses more than doubled the expected loss of 658 jobs. 1,455 positions were eliminated between 1998 and 2012.
- **Automotive** losses were in line with the expected changes. The sector lost 1,130 jobs.
- **Furniture** lost 1,004 jobs matching the expected loss for the sector.
- **Livestock Processing** in the region contradicted the expected stable scenario based on national trends and lost 750 jobs.
- **Local Commercial Services** was expected to create 407 jobs. However, this sector lost 2,668 positions.
- **Local Motor Vehicle Products and Services** declined well further than expected. 2,376 jobs were closed while the forecast was for a loss of 483 jobs.
- **Local Real Estate, Construction, and Development** employment was much affected by the recession. The sector was expected to lose 616 positions, but 2,108 jobs were lost instead. Employment in this sector was 14,751 jobs in 2012.

Innovation

Local experts agree with national-level findings—many of the region’s future employment opportunities will be in producing goods and providing services that we are not even aware of at this point in time. The relatively recent rise in hybrid and electric vehicle production noted above is just one indicator of how quickly a new product can move from concept to major market sales. The innovation centers in the region are increasingly spinning new business opportunities off of their R&D and proofing efforts. Ever-improving software systems coupled with these new opportunities are expected to drive diversification of the region’s future economy. The table below illustrates the most innovative sectors in the Cascades west region.

Table B-24. Top Clusters by Innovation in the Cascades West Region

Cluster Name	National Innovation Share, 2011	Change in Innovation share, 1998-2011	Innovation 1998	Innovation 2011
Information Technology and Analytical Instruments	33.50%	4.52%	53	90
Communications Equipment and Services	12.34%	7.02%	10	33
Production Technology and Heavy Machinery	9.80%	-4.41%	26	26
Aerospace Vehicles and Defense	6.25%	2.09%	8	17
Biopharmaceuticals	5.09%	1.74%	6	14
Downstream Chemical Products	4.70%	-1.15%	11	13
Upstream Chemical Products	4.06%	2.10%	4	11
Plastics	3.47%	-0.93%	8	9
Lighting and Electrical Equipment	3.30%	-0.04%	6	9
Automotive	2.70%	-2.04%	9	7
Metalworking Technology	2.46%	-0.54%	5	7
Medical Devices	2.37%	-0.16%	5	6
Printing Services	1.49%	0.01%	3	4
Recreational and Small Electric Goods	1.03%	-1.74%	5	3

Source: U.S. Cluster Mapping Project (<http://clustermapping.us/>), Institute for Strategy and Competitiveness, Harvard Business School. Data Sources

PART 2: COMMUNITY RESOURCES

This section presents information about resources and characteristics of the region's communities and jurisdictions related to economic development in the region. It is important to consider how certain community resources may serve as an obstacle or opportunity for economic development as the District begins implementation of the CEDS action plan.

Local Funding

Local governments have historically relied on property taxes as their primary income source. The passage of several property tax related ballot measures in the 1990s altered this tax structure. Local governments no longer collect property taxes on the full value of property within their jurisdictions and there is growing taxation disparity between similar properties. Because of property tax limitations, communities today increasingly use fee-based revenue generation to provide public services and to maintain and improve their community facilities and infrastructure. Further, many cities are at, or are nearing, the ten-dollar rate cap on local governments. Many communities are feeling financial strain, as they must balance budgets that have to address a recent Public Employee Retirement System charge and ever-rising employee insurance costs with limited ability to raise new revenue.

Since 1908, the federal government had provided 25-50% of the revenues received off of National Forest System lands to local governments (primarily schools and road maintenance by the counties) in which those lands were located. Changing federal harvest policies in the 1980s lead to a steep decline in federal timber sales and, therefore, in revenue sharing funds received.

Land Use Framework

Oregon's statewide land use planning program, initiated in 1973, is based on nineteen statewide planning goals. Oregon's land use program requires all local jurisdictions to develop and adopt Comprehensive Plans and implementation ordinances for land use and development to ensure that each has an adequate supply of land and related infrastructure to accommodate a twenty-year growth projection. While Oregon's basic land use framework remains essentially intact, recent court decisions, voter-initiated statutory changes, and other actions have affected how the "Oregon System" functions.

For detailed information regarding Oregon's Land Use policies see the Oregon Department of Land Conservation and Development at <http://www.oregon.gov/lcd/Pages/index.aspx>

20-Year Supply

Oregon established a statewide land-use planning program in 1973. The program requires all incorporated cities and counties develop and adopt comprehensive plans and zoning ordinances. One of the key requirements of the statewide planning program is that incorporated cities establish urban growth boundaries (UGBs) that provide land to accommodate 20 years of population and employment growth. Moreover, local governments are generally not allowed to develop urban services (i.e., water and wastewater systems) to areas outside of UGBs. The 20-year land need determination is based on population forecasts. In 2013, the Oregon Legislature adopted a bill that established the Population Research Center at Portland State University as the organization that develops “official” population forecasts. The intent is to update the forecasts every four years.

A key issue that has emerged is the process for amending urban growth boundaries. The statewide land use program requires cities plan for housing and economic growth based on population forecasts. The UGB amendment process has become very costly, time consuming, and uncertain. This potentially creates uncertainty for cities in maintaining a 20-year supply of land for commercial and industrial growth. As a requirement of other legislation passed in 2013, the Land Conservation and Development Commission is drafting rules that are intended to create an alternate, streamlined process for UGB review. That rule will be adopted in 2016.

Natural Resource Planning

Local governments are working to balance natural resource goals (open space, view-shed, riparian, wildlife, wetland, etc.) with private property development rights and development-related goals. Community resource values can enhance the quality and value of private development, but not all developers are willing or economically able to seek solutions that accommodate community resource values.

Transportation Planning

Development of transportation system plans, required of most jurisdictions by the State, has been challenging for many communities in the region. Transportation system plans must blend transportation needs within the land use framework. In larger jurisdictions, these plans must also address how the community will reduce vehicle miles traveled (VMTs). Many of the cities in the region rely heavily on State Highway infrastructure as a key component of their road networks. Land use changes (e.g., zoning amendment) that impact the State’s transportation system must address State transportation goals. Due to limited state resources, development must typically carry the costs of necessary highway improvements which are often outside the financial scope of most development proposals.

Shovel-Ready Industrial Lands

Land that is “Development-Ready” for development is consistently an in demand asset in the region. Many communities are interested in providing this type of inventory of ready to develop industrial sites. The State’s site certification process

is intended to identify and assist in removing barriers that typically stand in the way of making a site “Development-Ready” (such wetlands review; water, sewer, and storm drainage availability and capacity; transportation access; Brownfields; owner interest and established sale price) so that the site can be marketed to prospective industry. The complexity of resolving these development issues challenges the abilities of cities, especially smaller ones, to move vacant industrial lands toward development.

Downtown Redevelopment

The shift of commercial development to malls, strip developments, and big boxes has led to the decline of many traditional downtown commercial centers. Many communities are working to take better advantage of the existing public infrastructure and private business investments by restructuring their downtown business base, revitalizing public spaces, and addressing connectivity issues. Limited economic development assistance and funding remain challenges to turning these areas around, but some communities have made successful use of funding alternatives such as urban renewal districts and tax increment financing.

Water Systems

Water availability and quality are major factors supporting or preventing economic expansion. In areas where water supply is a problem, the capacity to develop is limited. Where water is available, the growth of competing uses must be managed to avoid overuse of the resource. The availability and cost of water is expected to continue to be a concern, particularly in areas with new development, as demand for this limited commodity increases.

Water Quality

Access to clean quality water sources is a significant factor in the successful recruitment of industry to the region. Locations where water quality is insufficient face additional challenges in recruiting certain industries. To be competitive, many locations require physical improvements, like monitoring systems and fencing, which create significant additional expenses. Coastal communities face unique water quality challenges due to geology, requiring them to continue to seek new groundwater sources.

System Improvements

In addition to improvements required for legal compliance, many community water systems are aging and in need of major system upgrades and replacements. For example, the water system in Lincoln City (located in northern Lincoln County) was created by the merger of five smaller community systems.

For more information on water quality and state requirements see the Oregon Department of Environmental Quality (DEQ) at:
<http://www.deq.state.or.us/wq/standards/standards.htm>

Waste Water Systems

Issues related to sewage collection and treatment are important to economic development in the region. Wastewater issues have a similar impact on development as issues related to water supply. The costs of improving, expanding and maintaining wastewater treatment systems may be factors that shape development in the region. Communities with treatment systems that are in compliance and have excess treatment capacity will have a competitive advantage for attracting economic development.

For more information on water quality and state requirements see the Oregon Department of Environmental Quality (DEQ) at:

<http://www.oregon.gov/DEQ/WQ/pages/index.aspx>

Solid Waste

There are currently two landfills for municipal solid waste in the CWEDD region: Short Mountain Landfill in Lane County, and Coffin Butte Landfill located in northern Benton County. Solid waste from Lincoln County is transported to Coffin Butte. Operators are recovering methane gas from both landfills to generate power. Short Mountain has resolved recent leachate issues with the installation of a capturing system, while excess leachate from Coffin Butte is trucked to municipal treatment facilities for disposal.

Recycling

A "wasteshed" is defined in Oregon law as being an area of the state that shares a common solid waste disposal system, or an appropriate area in which to develop a common recycling system. For the most part, individual Oregon counties are designated as wastesheds. Each of the four counties in the Cascades West region serves as a wasteshed, meaning residents and businesses have access to recycling services. More information about wastesheds can be found at <http://www.deq.state.or.us/lq/sw/contacts.htm>.

Hazardous Waste

Each community's sanitation service operators sponsor drop off dates and locations for disposal of hazardous household materials. All hazardous waste in the region is transported outside of the region to the Arlington landfill, the only site in the Northwest capable of accepting hazardous waste.

More information on Oregon's policies on Hazardous Waste Management can be found at: <http://www.deq.state.or.us/lq/hw/hwmanagement.htm>

Energy

Historically, the Pacific Northwest has enjoyed an abundant supply of relatively low-cost electrical energy due to hydropower's large contribution to the power base. Oregon's Department of Energy reports the following sources of electricity generation: Hydroelectric 44.7%; Coal 33.4%; Natural Gas 11.8%; Nuclear (Hanford

Nuclear Power Plant) 2.8%; Wind 5.2%; and other sources such as Solar, Landfill Gas, Geothermal, Petroleum, waste, and Biomass at 1.12%. More information can be found at:

http://www.oregon.gov/energy/pages/oregons_electric_power_mix.aspx.

In 2013 the U.S. Energy Information Administration reported the percentage of electricity used for household heating by source in Oregon was: Natural Gas 37.5%, Fuel Oil 2.5%, Electricity 50%, Liquefied Petroleum Gases 1.8%, and Other 8.3%. (<http://www.eia.gov/state/data.cfm?sid=OR>, Accessed 4/9/2015)

(<http://www.eia.gov/state/?sid=OR#tabs-4>)

Alternative Energy Sources

Proximity to the Pacific Ocean may allow the region to take advantage of alternative wind or tidal energy sources. The Cascades West Region also boasts two internationally respected Universities supporting pure and applied research into the field of Alternative Energy Sources. In particular, the Northwest National Marine Renewable Energy Center at Oregon State University's Hatfield Marine Science Center in Newport is a leader in this growing field.

More information on Oregon's renewable resources can be found at:
<http://www.oregon.gov/energy/renew/pages/index.aspx>

Communications

Communications and information services have become a critical infrastructure essential to economic development and economic resilience. Businesses, schools, employers of all types expect broadband services, and depend upon them for a wide variety of uses. Residents of the region expect these services as a basic quality of life component.

Portions of the Cascades West Region still find themselves lacking in this now basic necessity. Locations without these services are at a continuing disadvantage in the effort to increase economic development. The region will likely continue to be challenged by the need for increased bandwidth at lower prices as demand continues to exceed supply.

Transportation Systems

Effective transportation systems are a critical infrastructure resource and essential to economic development. Communities in the region recognize that despite consistent efforts to improve mobility within the region, communities face the ongoing issues of increasing traffic congestion, deteriorating and aging roadways, aging rail system infrastructure, limited alternatives to automobiles, and funding that consistently does not keep pace with the needs of the system. This has a variety of negative impacts on economic development in the region as potential new businesses consider whether or not the transportation infrastructure is capable of meeting their needs, and existing businesses consider expansion or migration to other areas with stronger infrastructure.

Area Commissions on Transportation and Metropolitan Planning Organizations

The Cascades West Region addresses these challenges through the use of Area Commissions on Transportation (ACTs), which are chartered through the Oregon Transportation Commission. ACTs address highway, rail, marine, air, and public transit items, with a primary focus on the state transportation system. A key element of the ACTs is the opportunity for local citizen involvement in Oregon Department of Transportation's (ODOT) decision making. ACTs play a critical role in Oregon's 4 year State Transportation Improvement Program (STIP). Another asset to the region are Metropolitan Planning Organizations (MPOs). MPOs are established under federal law and regulations as a partnership between local, regional, state and federal agencies. The MPO process establishes a continuing, comprehensive, and cooperative framework for making transportation investment decisions in metropolitan areas.

Funding

The State of Oregon Jobs and Transportation Act was the first comprehensive transportation package approved in more than fifteen years. The Act provides for a \$300 million increase in transportation investments each year. In addition to improvements to the State highway system, the bill provides significantly increased revenues to cities, counties, and transit systems. The Act also provides for a Connect Oregon II \$100 million investment in rail, port, air, and transit systems.

Roadway Network

The regional roadway network consists of several State highways that are the primary linkages between communities within the region; Interstate 5, the principal north-south statewide corridor in the state; county roads that serve the rural areas of the region and serve as secondary connections between cities; and the city street systems.

Revenues for highway improvements have not kept pace with either maintenance needs or capacity expansion requirements. Major highway capacity constraints in the region are:

- Along the I-5 corridor from north of Albany through Eugene
- Along Highway 101, particularly through Lincoln City
- Along the Highway 20/34 corridor between Philomath and Corvallis
- The Willamette River crossing in Corvallis and Highway 34 between Corvallis and I-5
- Highway 20 between Corvallis and Albany

The limited roadway system is further burdened by a significant number of daily travelers who work outside the cities in which they live, and continues to be seen in the increasing numbers of Vehicle Miles Traveled (VMT). Efforts to limit the VMT

numbers through means of public transportation have been limited due to scheduling and funding limitations.

Railway Network

Two Class 1 railroads serve the Willamette Valley: Union Pacific and Burlington Northern Santa Fe. Major rail yards are located in Eugene and Albany. Two shortline railroads connect with the main lines in the Albany area and provide freight service west to Toledo (Pacific and Western Railroad) and east to Sweet Home and Mill City (Albany and Eastern Railroad). The Central Oregon and Pacific Railroad provides rail service from Coos Bay to Eugene. There is no rail service between the Willamette Valley and the coast as the Pacific and Western line terminates in Toledo before reaching the deep-draft Port of Newport. There also exists a lack of “lay-down” areas which serve as transfer areas where different transportation modalities such as ocean-going shipping, rail and truck shipping intersect. The expansion of shipping capacity by all modes has the potential of making the region more attractive, and more cost effective to live and do business in.

Amtrak provides daily passenger rail service, with several trains and buses linking Eugene and Albany with Salem and points north and south. Ridership on the Cascadia Corridor service has grown steadily, particularly with better connections between Portland and Seattle.

Carpool Services

Commuters in the region have the option of utilizing Public Transportation carpool and vanpool coordination services offered through Lane Transit and Oregon Cascades West Council of Governments programs (OCWCOG). Lane Transit and the OCWCOG program also link with the Salem Transit District to the north to offer a region-wide Valley Vanpool Service that assists in the formation of vanpools and subsidies that reduce the cost of commuting for vanpool users. In the past few years the number of vanpools in the region has increased from 6-8 to 25. A significantly improved statewide carpool match program is expected to be available in late 2010.

Public Transit

There are four transit systems in the District:

- Albany Transit
- Corvallis Transit
- Lane Transit serving the Eugene/Springfield area and most of the communities in Lane County
- Lincoln County Transit connecting all Lincoln County cities

Linkages between these transit systems are provided by the:

- Philomath Connection – links Philomath into the Corvallis Transit system
- Inn-Benton Loop and the Linn Shuttle – limited regional transportation service between cities in Linn and Benton Counties
- Valley Retriever - links Lincoln County coastal communities and Benton, Linn, and Deschutes Counties

Because of funding restraints, commuting by public transit from most of the smaller communities in the region to the major employment centers is minimal. Those who utilize intercity bus services are predominantly students, seniors, and persons with disabilities. More information on Public & Special Needs Transportation in the Tri-County region of Linn, Lincoln and Benton counties can be found at: http://www.co.benton.or.us/pw/stf/documents/stf_tricounty.pdf

Multi-Modal Transportation

Multi-modal transportation options are increasingly being investigated and utilized by the region's residents. Corvallis and Eugene have long recognized the importance of bicycles as a transportation mode and are recognized as two of the best cities in the nation for bicycling. 97% of the collector and arterial roadways in Corvallis have bike lanes and there are 16 miles of multi-use paths. A 2008 survey indicated 22% of Corvallis area residents regularly commute by bicycle. Eugene has 39 miles of off-street bike paths and 89 miles of on-street lanes. Eugene also has five bike/pedestrian bridges. More information on multi-modal transportation options in the region can be found here:

- <https://www.eugene-or.gov/index.aspx?NID=489>
- <http://www.thempo.org/604/Bikes>
- <http://www.corvallisoregon.gov/index.aspx?page=162>
- <http://albanyvisitors.com/what-to-do/cycling-and-mountain-biking/>
- <http://discovernewport.com/activities/biking.html>

Air Services

Air services in the region are located in Newport, Corvallis, Albany, and Eugene. Eugene Airport the second largest airport in the state, has the largest aircraft capacity in the region. The smaller airports in Corvallis and Albany have struggled in the recent past to maintain commercial services and to remain profitable. In general, smaller airports are more reliant upon charter services for corporate traffic, and do not offer non-stop services.

Marine Transportation

The availability of Marine transportation is a significant and growing facet of economic development in the region, which has four Port Districts along its coastal border:

- Port of Alsea (Waldport) - Lincoln County

- Port of Newport - Lincoln County
- Port of Siuslaw (Florence) - Lane County
- Port of Toledo - Lincoln County

The Port of Newport is a deep draft port capable of servicing some of the largest shipping companies in the world. Enterprises of the four regional ports include: waterborne cargo transportation, ship repair, fisheries, recreation, and tourism, as well as provision of public facilities that support state economic interests beyond their immediate boundaries. Land development is also a major activity through land leases of industrial and commercial sites that have been developed or are still available for development.

Maintenance of Port Districts' waterways and harbor projects, such as dredging, jetties, and breakwaters, is dependent, wholly or in part, upon federal funding of U.S. Army Corps of Engineers (COE) activities. Justification of this federal funding is based on the amount of commercial use of these navigation systems, primarily waterborne commerce. Reduction of federal budgets increases the likelihood of the COE further abandoning ports of lower waterborne commerce usage.

Recreational, Leisure, and Historic Resources

Recreational and Leisure Amenities not only provide residents with recreational opportunities, they also provide a strong positive internal and external image of the quality of life in the region. Access to recreational and cultural amenities that provide a high quality of life are important factors in retaining and attracting business and industry. Further, visitors are drawn to enjoy the many unique amenities of the area, creating a tourism industry that is especially strong in coastal communities.

Residents of the region have access to a variety of active and passive recreational resources. Most of the population centers in the region are within a one-hour drive of national wilderness areas and forests, Oregon's public ocean beaches, dunes, reservoirs, lakes, and rivers. The abundance of natural resource based recreation amenities in the region is expanded with ski resorts, urban trail systems, golf courses and links, neighborhood and regional parks, libraries, unique shopping experiences, waterparks and pools, museums, and sports complexes. Eugene has a popular minor league baseball team. Sports and special events at the University of Oregon and Oregon State University complement activities at Eugene's Hult Center and multiple community performance venues.

Historic Districts and Sites

There are twenty-two National Register Historic Districts within the region. Community history, as relayed through local historic resources, is a key component of the identity of most communities in the region. Business recruitment promotions showcase historic resources as an indication of community pride. Multiple tourism promotions and events are staged around historic resources (covered bridge cycling tours, day trip routes, harvest festivals, homes tours). Many communities in the region are working to redevelop their historic commercial "downtown" areas as part of their economic development efforts.

Additional resources on recreation, leisure, and historic locations throughout the region can be found at the following websites:

- <http://traveloregon.com/>
- <http://visitcorvallis.com/>
- <http://www.eugenecascadescoast.org/>
- <http://albanyvisitors.com/>
- <http://coastvisitor.com/>

Public Higher Education

Several educational institutions based in the region provide the means through which crucial research and experimentation can occur that drives collaborative economic development. Oregon State University (OSU) in Corvallis and the University of Oregon (UO) in Eugene contribute to the region's culture of innovation through specific programs and research that link with local and global business clusters.

Programs

The outstanding programs of these two research institutions help put the region on the world map: OSU is home to nationally ranked programs in agriculture, forestry, conservation biology, fisheries and wildlife, public health, and well as marine sciences. OSU also has several unique facilities, including its own research forest, an ocean-going research ship and several smaller vessels, and the nation's largest tsunami wave basin. Programs of national distinction at UO include sports business, genome studies, special education, sustainability, native cultures, and entrepreneurship.

Research

Oregon State University and the University of Oregon add significantly to the region through the advanced research and development carried on at their facilities and by their faculty:

- The UO received \$110.3 million in grants, contracts and other competitive awards in the fiscal year 2014 — a 13% increase from the previous year. The total was made up of 631 awards received by 264 principal investigators.
(<http://uoresearch.uoregon.edu/news/around-campus/uo-made-steady-gains-research-and-innovation-fy-2014>)
- Oregon State University grants and contracts totaled almost \$285 million in overall funding in the 2014 fiscal year.
(<http://research.oregonstate.edu/research-office-dashboard>)
- OSU and UO jointly established the Oregon Nanoscience and Microtechnologies Institute (ONAMI) with other research institutions in the northwest to promote research and commercialization in the

miniaturization of energy, chemical, and biomedical processes. They are also partners in Oregon BEST and OTRADI.

This research has led to improving the academic prestige of the universities and placed the universities as one of the most important “traded sectors” of the region. It has also resulted in spin-off companies, several of which have become major employers in sectors diversifying the economic base of the region.

Community Colleges

Lane, Linn-Benton, and the Oregon Coast Community Colleges are responsive to regional workforce needs, which have led to the creation of specialized training at the community colleges that help position the region for the new economy.

- Oregon Coast Community College’s Newport campus expanded its marine programs along with sister facilities in South Lincoln and in Lincoln City.
- Lane Community College (LCC) developed a new, 80,000-square-foot downtown center that provides affordable access to job-training and small business development education in an innovative “green” building with easy access to mass transit. LCC added access to training programs in health and alternative health care and in energy management and renewable energy

Innovation and R&D Centers

Several centers of innovation and excellence have been established in the region. These centers help place the region at the forefront of innovation in several specialty fields, specifically in technology and marine research.

Oregon Nanoscience and Microtechnologies Institute (ONAMI) is a cooperative venture of world-class nanoscience and microtechnology research and development institutions and industry in the Pacific Northwest. This partnership, which includes Oregon State University and the University of Oregon, is moving nanoscience and microtechnology innovations from basic research through to commercialization and expanding the benefits of technology innovations to traditional and natural resource industries. ONAMI operates from a research facility in Corvallis. (<http://onami.us>)

Oregon Translational Research and Drug Development Institute (OTRADI) is a signature research center dedicated to linking Oregon university researchers and biotech or pharmaceutical companies to fuel drug discovery and commercialization in Oregon. OTRADI leverages cutting-edge, world-class scientific equipment and expertise to attract funding, increase the commercialization of drugs and scientific products, and translate licensable products into new biotech companies. (<http://www.otradi.org>)

Oregon Built Environment and Sustainable Technologies Center (Oregon BEST) connects businesses with a shared network of university labs to transform green building and renewable energy research into on-the-ground products, services and jobs. Oregon State University and the University of Oregon are among the four founding university partners of Oregon BEST. (<http://oregonbest.org>)

Northwest National Marine Renewable Energy Center (NNMREC) provides a full range of capabilities to support wave and tidal energy development. This partnership of OSU and the University of Washington is positioned to close gaps in understanding, inform regulatory and policy decisions, and facilitate wave energy conversion device commercialization. (<http://nnmrec.oregonstate.edu>)

National Oceanic and Atmospheric Administration (NOAA) is located in the Port of Newport in Lincoln County as the agency's Marine Operations Center-Pacific. NOAA understands and predicts changes in the Earth's environment, from ocean depths to sun's surface, and conserves and manages coastal and marine resources. The NOAA Marine Operations Center-Pacific is comprised of approximately 175 employees, including officers and crew assigned to NOAA's research vessels. The NOAA research facility, along with the NOAA Pacific Marine Environmental Lab, the OSU Hatfield Marine Science Center, and the Northwest Fisheries Science Center creates a world-class marine-related research and development center in the region. (<http://www.moc.noaa.gov/MOC-P/>).

Regional Accelerator and Innovation Network (RAIN) serves entrepreneurs in Oregon's South Willamette Valley by helping turn ideas into innovative companies that can grow locally. There are two Oregon RAIN Accelerators, one located in Corvallis (OSU Advantage Accelerator Rain Corvallis), and the other in Eugene (Eugene RAIN). Both provide guided business acceleration programs, and the Oregon RAIN Innovation Network assists in building and connecting resident talent, capital and infrastructure with research universities to create a network for entrepreneurs. RAIN operates regionally, as well as locally. (<http://www.oregon-rain.com>).

Fertilab Thinkubator is located in the Eugene Fermentation district as a non-profit community and network of resources to support entrepreneurs in Lane County. The Thinkubator is comprised of engineers, scientists, marketers, software developers, and allied professionals making up over a dozen companies, with a high concentration of biotech startups. (<http://fertilabthinkubator.com>)

Health Care Facilities

Health care facilities are among the largest employers in the Cascades West region. The overall health care field increasingly plays a significant role in economic health and vitality. Health care professions are among the fastest growing occupations in the region. Consolidation of health care facilities has resulted in new investment in technology and medical infrastructure in the region. Several major new facilities or expansions have been completed in recent years, and more are in the planning or construction phase.

Access to health care in the smaller communities of the region is being addressed by new partnerships among the larger medical facilities, medical training programs, and regional medical transportation services. The restructuring of major medical facilities in the region has limited immediate care access in more rural communities, however.

PART 3: NATURAL RESOURCES

This section presents information about Cascades West’s natural systems that have an influential role on the region’s economic development efforts. The region’s natural characteristics have direct and indirect impact on economic activity in the District, therefore it is important to consider the role of these resources as the District begins implementation of the CEDS action plan.

Agricultural Lands

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.” Policies designed to support a healthy agricultural economy include land use zoning, designation of urban growth areas, and property tax deferrals. In addition to providing economic diversity and food production, keeping land in agricultural use promotes land conservation, which is particularly important where agricultural lands lie in close proximity to urban areas.

Forest Lands

Forest lands are important to the Cascades West region for their economic, environmental, recreational, and quality of life benefits. Forest lands cover 75% of the region, with 50% of the region in State or Federal forest land. Timber harvest reductions have dramatically reduced the number of professional staff in the region focused on forest health. Federal staff reductions have resulted in the closure of multiple U.S. Forest Service ranger stations, removing another employer from already economically fragile rural communities.

Water Quality

Water quality and quantity issues have a large impact on development in the region. Water resources are used extensively for domestic, recreation, agriculture, industrial and commercial activities. These human-oriented uses must be balanced with the habitat requirements of fish and wildlife.

Surface Water Health

Multiple creeks, streams and rivers flow toward either the Pacific Ocean on the west side of the Coast Range, or toward the Willamette River on the east side of the Coast Range.

Pacific Ocean: The vast body of the Pacific Ocean defines the western edge of the region. The coastal area has numerous rivers and drainage basins that discharge directly into the Pacific Ocean. Estuaries serve critical functions in the ocean

ecosystem. Urban storm water runoff and discharge of sewage effluent challenge bay health that, in turn, challenges economic health.

Willamette River Drainage Basin: The Willamette River Drainage Basin covers approximately 12% of the State of Oregon and contains nearly 70% of Oregon's population, according to the Oregon Department of Environmental Quality (DEQ). The river system within the basin consists of the Willamette and thirteen major tributaries, which ultimately flow into the Columbia River. The Willamette River contributes 15% of the annual average flow of the Columbia River.

Groundwater Health

Groundwater recharges area streams and rivers and provides a non-surface drinking water source for multiple community water systems. The quality of groundwater sources in the region are influenced by human activities as well as natural factors. One factor affecting groundwater quality and quantity is development and associated stormwater runoff. When stormwater is channeled directly into a surface water body, less water goes into the ground. Even where stormwater is recharged to the ground through a pond or trench, it can carry pollutants in amounts that can contaminate groundwater.

Air Quality

Generally, air in the region is of high quality. In the region, the U.S. Environmental Protection Agency (EPA) requires environmental monitoring of air quality only in Lane County, where three of the six National Ambient Air Quality Standards are monitored: particulate matter, ozone, and carbon monoxide.

Land Quality: Brownfields and Superfund Sites

Brownfield Sites

As of May 2015, 585 sites in the Cascades West region were identified on the Oregon Department of Environmental Quality (DEQ) Environmental Clean-up Site Information (ECSI) database. DEQ has determined that "No Further Action" (NFA) is needed on 231 of the sites listed for the region, leaving 354 sites still requiring some level of assessment and/or cleanup. More information about each of the sites can be found at <http://www.deq.state.or.us/lq/ecsi/ecsi.htm>

Hazardous Waste Sites

Hazardous wastes have been confirmed at 100 of the 527 sites qualifying as "brownfields." These 100 sites are included in the State's Confirmed Release List (CRL). To be placed on this list, a site must have had a release of a hazardous substance that is significant in quantity or hazard and is confirmed by qualified observation, owner/operator admission, or laboratory data. Of the 527 ECSI sites, 48 are currently on DEQ's Inventory of Hazardous Substance Sites (Inventory) requiring further investigation or removal, remedial action, or engineering or institutional controls are needed to protect human health or the environment.

Superfund Sites

The level of potential health and environmental threat from contamination moved the clean-up of some sites into the more intensive federal “Superfund” clean-up program. The National Priorities List (NPL) for the Superfund program includes thirteen Oregon sites, three of which are located in the region: Black Butte Mine in Cottage Grove, United Chrome Products in the Corvallis Airport Industrial Park and Teledyne Wah Chang in Albany. Natural Hazards

Disaster Preparedness

The communities in the region continue to develop and refine planned responses to natural hazard emergencies, to avoid the hazard if possible, and to minimize any long-term negative impact resulting from the hazard. Local emergency management plans are mandated by the Federal Emergency Management Agency (FEMA) to qualify for pre- and some post-disaster assistance.

A Regional All Hazard Mitigation Plan, completed for the region in 1996, focused primarily on the hazards of flooding, severe storms, mudslides, and landslides. All counties have emergency response plans. If a major emergency strikes, Benton, Lane, and Linn Counties will work with Marion, Polk, and Yamhill Counties. Lincoln County and coastal Lane County cooperate with other coastal areas.

Floods

Traditionally, the most commonly occurring natural emergencies in the region have been floods. The region continues to work on flood control by refining and adjusting emergency procedures and the re-designation of some areas near Willamette Valley waterways as floodplain. Communities continue to monitor designated flood hazard areas to make certain that any development in those areas is safe and appropriate for flood management. Assessment of storm drainage systems, policies that encourage percolation instead of runoff of stormwaters, and evaluation of fill requests have all been elevated in importance over the past decade.

Tsunamis

Tsunami hazard zones appear along the Pacific coastline of the region, extending inland along bay fronts, rivers, and streams. Tsunamis are a series of sea waves usually caused by a displacement of the ocean floor by an undersea earthquake. Recent tsunami events showcased at the global-level reminded residents along the Pacific Coast of the importance of tsunami planning. Threats of a Pacific Coast tsunami have coastal officials improving their notification systems, clarifying safe zones, and adjusting their response systems. Most coastal communities continue to review their tsunami hazard zones, refining tsunami evacuation plans, and identifying how development plans within hazard zones should be adjusted. The premier wave research lab at Oregon State University provides researchers worldwide with tsunami modeling capabilities.

Earthquakes

The region is located in the Cascadia Subduction Zone. If plates along the Cascadia ridge shift, earthquakes of up to 9.0 on the Richter scale could be experienced. Scientists project that this would have a devastating impact in most of Oregon and Washington.

Weather-Related Hazards

Weather in the region is typically relatively mild. Unlike many other areas of the U.S., there are few weather-related events that actually result in the slowing-to-stopping of business and community operations:

- In the Willamette Valley, interruption of power and reduced mobility can be created by ice and snow because most cities lack sanding and snow removal equipment.
- On the coast, high winds are a more severe and more frequent occurrence. Areas of the coast do often experience brief power outages as winds top 60 to 75 mph.
- The more mountainous areas of the region are often impacted by snowstorms, which can limit access over mountain passes and cut power supplies to outlying residents.
- Rain inundated clay soils and unstable road banks infrequently result in slides that can close roadways and strand communities.

Wetlands, Riparian Zones, Conservation Areas

Natural resource planning under Oregon’s Land Use System requires that jurisdictions consider how to address and protect a variety of resource values. Jurisdictions seek to balance sometimes conflicting development goals with these resource-related goals. Planning sponsored by watershed councils at the watershed level allows the multiple interests within each watershed to be represented.

Wetlands

Wetlands in the region range from apparent marsh and bog wetlands to well-drained grass seed fields in the Willamette Valley. A variety of agencies are responsible for regulating activities that occur in wetlands. In some cases both the U.S. Army Corps of Engineers and the Oregon Department of State Lands (DSL) have permitting authority for a wetland. There is a “no net loss” of wetlands approach that applies to both public and private lands. Many cities have invested in further identification of wetlands such as through local wetlands inventories to identify and refine wetland boundaries.

Riparian Areas

Urban areas in the region are re-evaluating setbacks along their waterways to determine the effectiveness of current standards and whether additional setbacks or riparian protection measures are needed. On forest lands, the timber industry-

supported Oregon Forest Practices Act establishes Riparian Management Areas of fifty to one hundred feet along streams and wetlands on private lands.

Conservation Areas

Purchased and leased conservation easements are increasingly being offered in the region by non-profits and public agencies to encourage protection of natural resource values. Easement lease agreements can be structured to allow owners to continue producing agricultural commodities and timber on their land, with protection plans legally defining restoration and maintenance responsibilities.

Marine Reserves

From 2009 to 2013, the State of Oregon established five pilot marine reserves, one of which is located off of Otter Rock in northern Lincoln County, one at Cape Perpetua near the border of Lincoln and Lane Counties, Redfish Rocks near Port Orford, one north of Lincoln City at Cascade Head, and Cape Falcon located north of Manzanita¹. A well designed reserve could generate overall long-term economic benefit, balancing a loss of fishing areas with an overall increase in fish and invertebrate populations, and provide added attraction for sightseers, kayakers, scuba divers and other tourists.

Threatened and Endangered Species

Seventeen animal and six plant species listed through the Federal Endangered Species Act are found within the region. Species listed on the federal ESA can affect development on federal, State, and private lands. Listing on the Oregon ESA affects only actions of State agencies on State lands (less than 3% of Oregon's land base).

Climate Change

The most recent study on the area, Preparing for Climate Change in the Upper Willamette Valley Basin of Western Oregon (March 2009), projected several potential changes in the region as a result of global climate change. These included a possible annual temperature increase of 2-4 degrees Fahrenheit with an increase in summer temperatures of 4-6 degrees. There is uncertainty about the effects on annual precipitation, but 65% decrease in snow pack within the next 30 years is projected. The changes are expected to impact stream flows and are likely to increase the frequency and severity of storm events.

The potential consequences of these projected changes are less certain, but may be critically important for the region. These consequences range from the probability of higher electricity costs, reduced water supplies, and increased pressure on already threatened and endangered species. While the consequences of these projections and the growing mandates for action are uncertain, local governments and the local economy will be impacted by this issue.

¹ Updated based on (<http://www.opb.org/news/blog/ecotrope/oregon-senate-passes-marine-reserves-bill/>)