



CWEDD | ECONOMIC
DEVELOPMENT
CASCADES WEST | DISTRICT

CEDS Workshop
Thursday, October 3, 2019
9:00 – 12:00 am

Oregon Cascades West Council of Governments
1400 Queen Avenue SE, Albany

AGENDA

- | | | | |
|----|-------|---------------------------------|-----------------------------|
| 1. | 9:00 | Call to Order & Agenda Review | Chair,
Mayor Dann Cutter |
| 2. | 9:05 | Welcome and Introductions | All |
| 3. | 9:15 | Orientation | Phil Warnock
OCWCOG |
| 4. | 9:25 | Overview of CEDS (Attachment A) | Phil Warnock
OCWCOG |
| 5. | 10:00 | Review Document (Attachment B) | Phil Warnock
OCWCOG |
| 6. | 10:30 | Suggested Edits | All |
| 7. | 11:30 | Next Steps | All |
| 8. | 11:45 | Other Business | Chair |
| 9. | 12:00 | Adjournment | Chair |

Comprehensive Economic Development Strategy, 2015-2020

Cascades West Economic Development District



September 2015

Volume I: Basic Plan

Prepared for:
Cascades West Economic Development District

Prepared by:



This Comprehensive Economic Development Strategy was prepared by –



With planning grant funding provided by the



U.S. Department of Commerce
Economic Development Administration

Approval of this document has been recommended by -

- Lane Economic Committee September, 2015
- Oregon Cascades West Council of Governments Community and Economic Development Committee September, 2015

For consideration by -

- Cascades West Economic Development District Board of Directors
- Lane Council of Governments Board of Directors
- Oregon Cascades West Council of Governments Board of Directors
- U.S. Department of Commerce Economic Development Administration

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SPECIAL THANKS & ACKNOWLEDGEMENTS

The Community Service Center's Community Planning Workshop at the University of Oregon developed this Comprehensive Economic Development Strategy in collaboration with the Cascades West Economic Development District, the Oregon Cascades West Council of Governments and the Lane Council of Governments. The University of Oregon Economic Development Administration University Center provided technical and funding support. The U.S. Economic Development Administration provided primary funding for the project.

Cascades West Economic Development District Board and 2015-2020 CEDS Strategy Committee

- Anne Schuster, County Commissioner, Benton County
- Biff Traber, Mayor, City of Corvallis
- Bill Hall, County Commissioner, Lincoln County
- Bob Elliott, Council President, City of Lebanon
- Caroline Bauman, Executive Director, Economic Development Alliance of Lincoln County
- Chris Workman, City Manager, City of Philomath
- Dann Cutter, City Councilor, City of Waldport
- Faye Stewart, County Commissioner, Lane County
- Gary Marks, City Manager, City of Lebanon
- Greg James, Willamalane Parks and Recreation District
- John Pascone, AMEDC President
- John Simpson, Eugene Water and Electric Board
- Marilee Woodrow, City of Springfield
- Pam Barlow-Lind, Tribal Planner, Confederated Tribes of Siletz Indians
- Ric Ingham, City Administrator, City of Veneta
- Rob Scoggin, Chairperson, Lane Economic Committee
- Sharon Konopa, Mayor, City of Albany
- Tom Nelson, Economic Development Manager, City of Corvallis
- Sherry Duerst-Higgins, Lane Education Service District
- Susy Lacer, Siuslaw Library District

Oregon Cascades West Council of Governments

- Fred Abousleman, Executive Director
- Charlie Mitchell, CED Director
- Lydia George, Deputy Director
- Emma Chavez, CED Executive Administrative Assistant

Lane Council of Governments

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- Stephen Dignam, Economic Development Program Manager

Oregon Regional Solutions

- Jackie Mikalonis, South Valley / Mid Coast Region Coordinator

U.S. Economic Development Administration

- David Porter, Oregon EDA Representative

Community Planning Workshop

- Robert Parker, Community Service Center, Director
- Josh Bruce, Community Service Center, Project Advisor
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- Fabio Ramos de Andrade, Project Associate
- Kelsey Zlevor, Project Associate

Additional Thanks:

To the members of the Lane Economic Development Committee and OCWCOG Community and Economic Development Committee for meeting, deliberating, reviewing the document and providing feedback. And to the numerous private and public sector members of the OCWEDD who responded to the survey, participated in phone interviews and focus groups, and reviewed and commented on the draft document.

About the Community Service Center

The Community Service Center (CSC), a research center affiliated with the Department of Planning, Public Policy, and Management at the University of Oregon, 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 the CSC 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.

About Community Planning Workshop

Community Planning Workshop (CPW) is an experiential program within the Department of Planning, Public Policy and Management at the University of Oregon. Students work in teams under the direction of faculty and Graduate Teaching Fellows to develop proposals, conduct research, analyze and evaluate alternatives, and make recommendations for possible solutions to planning problems in Oregon communities. The CPW model is unique in many respects, but is transferable to any institution that desires to link pedagogy with community service.

About the EDA University Center

The University of Oregon Economic Development Administration University Center (EDAUC) is a partnership between the Community Service Center, the UO Department of Economics, the Oregon Small Business Development Center Network and UO faculty. The UO Center provides technical assistance to organizations throughout Oregon, with a focus on rural economic development. The UO EDAUC seeks to align local strategies to community needs, specifically with regards to building understanding of the benefits of sustainable practices and providing technical training to capitalize on economic opportunities related to those practices. The UO EDAUC is partially funded through a grant from the U.S. Department of Commerce, Economic Development Administration.

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EXECUTIVE SUMMARY

The Cascades West Economic Development District (CWEDD) is designated by the U.S. Department of Commerce Economic Development Administration to work on economic development efforts in Linn, Benton, Lane and Lincoln Counties. The CWEDD advocates for, supports and coordinates regionally significant economic development activities in the region. The District prepared this Comprehensive Economic Development Strategy to guide regionally significant economic development projects and activities over the next five years.

Regional Economic Vision

THE DISTRICT'S PREFERRED FUTURE INCLUDES A GROWING AND DIVERSIFIED ECONOMY WITH RANGE OF EMPLOYMENT OPPORTUNITIES THAT PROVIDE STABLE FAMILY WAGE JOBS, LIFELONG LEARNING AND TRAINING OPPORTUNITIES, SUSTAINABLE NATURAL RESOURCES, INTEGRATED INFRASTRUCTURE, AND COORDINATION AMONG ECONOMIC DEVELOPMENT EFFORTS THROUGHOUT THE REGION.

Goals

- Create partnerships needed for **REGIONAL COLLABORATION**
- Advance economic activities that **INCREASE** access to and provide a range of **EMPLOYMENT OPPORTUNITIES**
- **BUILD** on region's **ENTREPRENEURIAL CULTURE** and assets through collaborative means
- Identify and leverage internal and external funding sources to **FUND** projects that increase the resilience (diversity and redundancy) of **INFRASTRUCTURE** systems throughout the district
- Partner to **CONNECT WORKFORCE** training, education, and entrance opportunities **WITH** workforce **DEMAND**
- **ENHANCE VISIBILITY OF** community assets and accessibility of basic services in **RURAL AREAS**

What is a CEDS?

"...an economic roadmap to diversify and strengthen Regional economies."

- U.S. Economic Development Administration

Marketable Strengths

The following lists, grouped by category, present strengths identified during the SWOT analysis.

Connectivity:

- Direct access to interstate 5
- Multi-use ocean ports for fishing, research and trade
- Local, regional, national and international rail network
- Freight infrastructure

Culture of Innovation

- Business incubators and accelerators (e.g. Regional Accelerator & Innovation Network, FertiLab)
- Research institutes and higher education institutions
- Proven track record of successful business starts (e.g. Nike, Garage Games, Molecular Probes)

Supportive Business Climate

- Adaptive and attractive building code processes
- Small business support (e.g. chambers of commerce, Cascades West Financial Services)
- Workforce training centers

Technical Support

- Councils of Government (LCOG, OCWCOG)
- UO Economic Development Administration University Center
- Multiple economic development related non-profits and foundations

District-Wide Opportunities

The following lists present opportunities identified during the SWOT analysis.

- Quality of place for growing population segments (i.e. retirees, families, aging baby boomers, climate migrants, etc.)
- Growing trade between US and Asia
- Enterprise zones
- Access to available capital
- Increasing higher education enrollment
- Growing national and international economies
- Workforce training and education
- New and expanding markets (e.g. value-added forest products, marijuana, tourism, craft beer and wine, etc.)
- 'Green business'
- Renewable energy
- 'Lay-down' areas for multi-modal freight transfers
- California and Washington markets
- Growing national and international economies

Guiding Principles

Guiding principles provide structure for the plan update process. Figure S-1 shows the guiding principles agreed upon by the OCWEDD board for the 2015 CEDS update.

Figure S.1: 2015-2020 CEDS Guiding Principles



Source: Community Planning Workshop

Implementation Structure

The implementation structure outlines the District's approach to achieving its vision. The 2015-2020 CEDS Action Plan is structured as follows:

- **Goals:** The goals are broad statements that describe the District's overarching aspirations for economic development in the region.
- **Objectives:** Objectives are closely tied to goals. They describe specific and measurable milestone to work towards in order to achieve each goal.
- **Strategies:** A strategy describes a plan of action and approach designed to achieve each objective.
- **Actions:** Actions describe the specific steps needed to implement the listed strategy.

Figure S.2: 2015 CEDS Action & Implementation Plan



Source: Community Planning Workshop

Comprehensive Action Plan

The following table summarizes specific **priority** CEDS actions organized by plan Goal. Refer to the Strategic Action Plan section beginning on Page 13 for a complete list of actions categorized by Goal, Objective and Strategy. Volume II, Appendix A contains detailed information for all action items, including potential partners, implementation ideas, proposed timeline and estimated budget.

Figure S.3: 2015 High Priority CWEDD CEDS Actions

Goal	Priority Actions	Y1	Y2	Y3	Y4	Y5
Regional Collaboration	1.1.1.1: Create and maintain a CWEDD website to function as an information hub for the region by 2016. (1)					
	1.1.1.2: Create a regional economic development organization chart that clearly identifies the linkages and roles of all economic development agencies. (1)					
	1.2.1.1: Create and convene at least annually four working groups to be responsible for implementation and monitoring of each goal/priority area identified in this CEDS. (1)					
Economic Development	2.1.2.1: Coordinate the inclusion of regional branding language on local jurisdictions' and the State of Oregon's tourism promotion efforts. (1)					
	2.2.1.1: Create and promote a database of incubators, accelerators, capital sources and support services available in the region by 2016. (1)					
	2.2.2.1: Working groups agree on two to three of the following business clusters to focus business development efforts on over the next 5 years: software/technology; food and beverage; education technology and research; advanced manufacturing; value-added forest products; university-related spinoffs; health; marine; agriculture; bioscience; and natural textiles. (O)					
Entrepreneurship & Innovation	3.1.1.1: Organize a forum on regional innovation networking by the end of June 2016. (A)					
	3.1.2.2: The CWEDD will develop and implement a strategy for increasing business visibility, involvement, and entrepreneurial education into local schools by 2017. (O)					
	3.1.2.3: Prepare and promote an inventory of resources available to entrepreneurs by December 2016 through a combination of mixed media such as a website, listserv, or social media. (1)					
Technical Support	4.1.1.1: Create a section in the CWEDD website to list current funding opportunities for local jurisdictions by December 2016. (1)					
	4.1.2.1: CWEDD will work with OCWCOG and LCOG to complete a Regional Needs Assessment by summer of 2016. (A)					
Workforce Development	5.1.1.1: Assess the workforce development system in the region and make recommendations to the CWEDD Board about the CWEDD's role in supporting coordination among workforce development organizations. (1)					
	5.1.1.2: 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. (O)					
Rural Development	6.1.1.1: In partnership with local Main Street programs, identify and support downtown revitalization projects in rural communities each year. (O)					
	6.1.3.1: The Rural Development Working Group will use the results of the regional needs assessment (from Action 4.1.2.1) to identify, prioritize, and recommend a set of rural area "projects of regional significance" to the CWEDD Board. (O)					

Key: (1) one time project; (O) ongoing project; (A) annual project; (LD) limited duration project

Source: Community Planning workshop

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 CWEDD 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

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

What is a CEDS?

"CEDS are designed to bring together the public and private sectors in the creation of **an economic roadmap to diversify and strengthen Regional economies**. The CEDS should analyze the Regional economy and 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**. Public and private sector partnerships are critical to the implementation of the integral elements of a CEDS set forth in paragraph (b) of this section. As a performance-based plan, the CEDS will serve a critical role in a Region's efforts to defend against economic dislocations due to global trade, competition and other events resulting in the loss of jobs and private investment."

- U.S. Economic Development Administration

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 2010 CEDS. It sets the vision and strategy for the next five-year implementation cycle. The University of Oregon's Community Service Center (CSC) facilitated the plan update process and prepared this plan.

The development and maintenance of the CEDS is required to qualify for U.S. Economic Development Administration assistance under its public works, economic adjustment and planning programs, and is a prerequisite for designation by the U.S. Economic Development Administration 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 important projects and activities 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 support broader regional goals.

Process and Methods

As noted above, 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 herein are intended to meet the federal requirements for CEDS. Specifically, the plan update process involved review of available economic data and plans, consultation with the CWEDD Board/CEDS Strategy Committee¹, and interviews, surveys, and focus groups with key stakeholders. The process included visioning, goal setting and action planning exercises. From this in-depth exploration of regional attitudes of economic development, the following set of guiding

Challenges

How to get 38 jurisdictions to work toward a shared vision?

How to diversify and strengthen the regional economy?

How to make the region more resilient?

Opportunities

Higher education institutions and research centers.

Culture of entrepreneurship and innovation.

Beautiful environments and abundant natural resources.

¹ In order to ensure regional representation, the CWEDD Board elected to serve as the CEDS Strategy Committee for the 2015-2020 update. This plan outlines a set of administrative changes the district will implement over the next five-years to restructure and clarify the administrative structure of the CWEDD. These changes include defined roles for the Board, Working Groups and Strategy Committee.

principles emerged, providing structure and focus for the planning team throughout the plan update process.

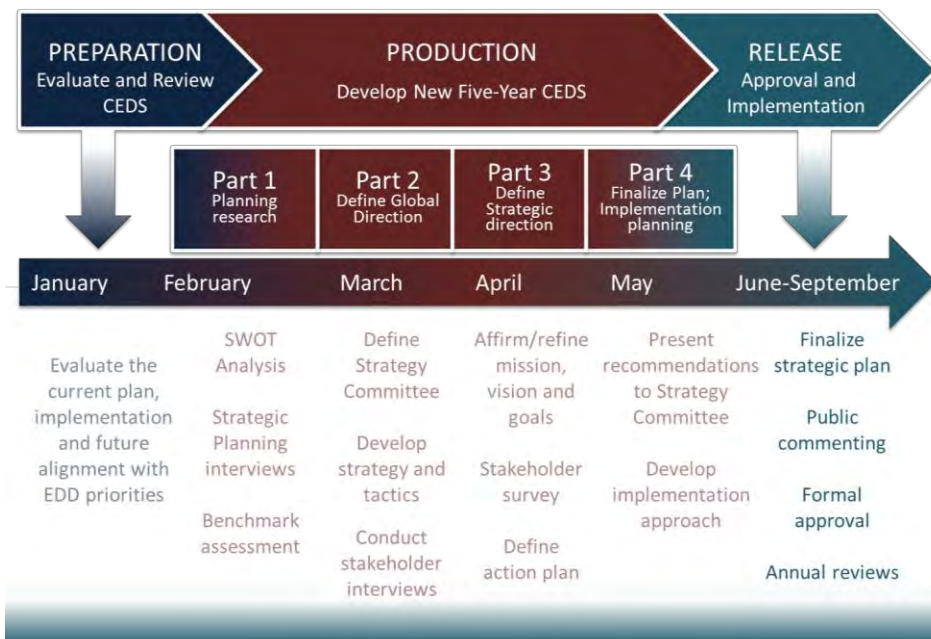
Figure 1.1: 2015 CEDS Guiding Principles



Source: Community Planning Workshop

The CSC used an iterative, facilitated method to update the CEDS. The process included: (1) convening the CWEDD Board; (2) updating data related to characteristics and economic trends in the region (3) developing and administering an online survey of both internal and external stakeholders, (4) conducting stakeholder interviews, (5) convening a coastal focus group; and (6) preparing draft and final plan material for review and comment. Figure 1.2 below summarizes the overall work program and schedule of activities.

Figure 1.2: Project Activities and Timeline



Source: Community Planning Workshop

Organization of this Report

The CEDS is divided into two volumes. The following outline summarizes the content contained in each volume and the sections therein.

Volume I

- Introduction: Provides background on the CEDS, describes the methods used to update it and presents the overall structure of the document.
- District Profile Summary: Presents a summary of the Region's economic development conditions and summarizes its strengths, weaknesses, opportunities and threats.
- Strategic Action Plan: Presents the 2015-2020 CEDS vision, goals, objectives, strategies, and actions.
- Implementation: Presents the Board structure, a draft timeline for implementation over the next five years and the District's plan for measuring performance.

Volume 2

- Appendix A - Action Item Forms: Contains detailed descriptions of each action including rationale, ideas for implementation, champion, potential partners, potential funding, performance measurements, and estimated costs and time.
- Appendix B – Project List: This section will list potential projects that may qualify for funding from outside sources, including the EDA. The Board will update this section as regionally relevant economic development projects emerge over the next five years.
- Appendix C - Socioeconomic Profile: Presents demographic and economic data about the region. These can serve as economic indicators for the region as a whole.
- Appendix D – Community Resources: Presents information about resources and characteristics of the region's communities and jurisdictions related to economic development in the region.
- Appendix E – Natural Resources: Presents information about Cascades West's natural systems that have an influential role on the region's economic development efforts.
- Appendix F - Process: Provides a summary of the process used to facilitate the update of the 2015-2020 CEDS for the Cascades West Economic Development District. This includes agendas and minutes from the District's Board meetings.
- Appendix G – SWOT Analysis: Provides a summary of the Strengths, Weaknesses, Opportunities, and Threats analysis conducted with the District. This includes input from the District Board, the stakeholder survey, and stakeholder interviews.

- Appendix H – Stakeholder Survey Results: Provides key findings, implications, and summarized results from the stakeholder survey.
- Appendix I – Interview and Focus Group Results: Provides key findings, implications, and summarized results from stakeholder interviews and the coastal focus group.
- Appendix J – Resilience Assessment: This section will present a set of resilience principles the District can use to increase its ability to anticipate, absorb, adapt to, and recover from potential economic disruptions.

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DISTRICT PROFILE SUMMARY

This section summarizes key characteristics of the region and provides background on the region's economic development situation. In addition, the section outlines the region's strengths, weaknesses, opportunities and threats. For additional detail, please refer to the technical appendices in Volume II of this plan. This section, together with information contained elsewhere in this report, satisfies 13 C.F.R. § 303.7(b)(i) and (ii).

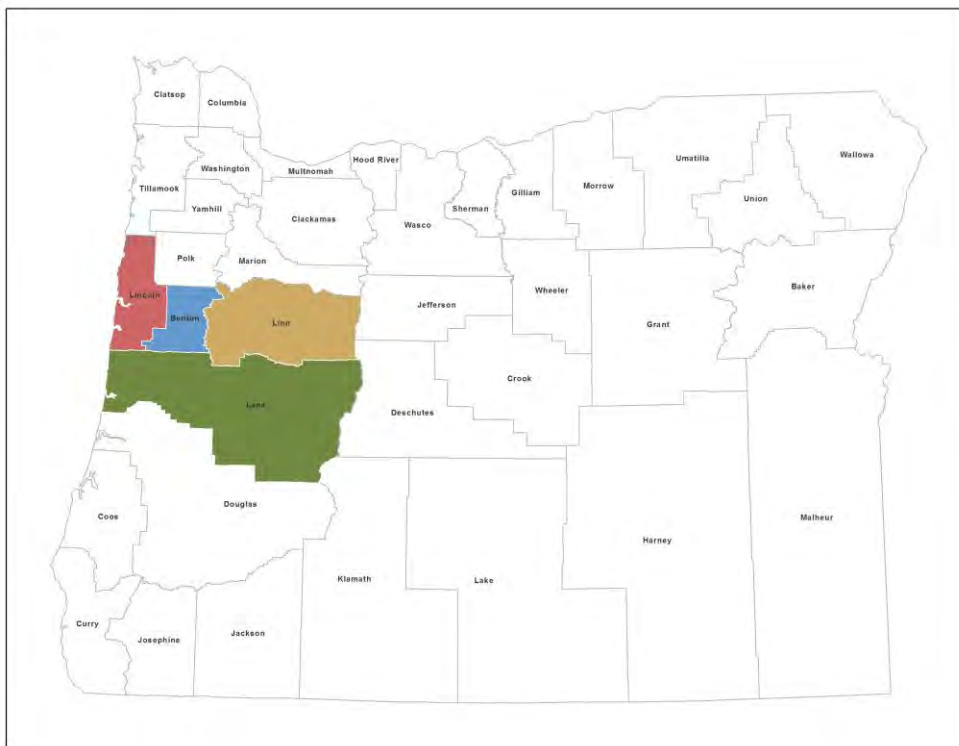
Economic Development Conditions

This CEDS is based on an assessment of the economic conditions of the region. The following subsections summarize the unique features and characteristics of the CWEDD. 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.

Figure I.1: Map of the CWEDD Planning Region



Source: Community Planning Workshop

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 surround the major population centers located along the Interstate 5 corridor.



Photo Source: Gary Halvorson, Oregon State Archives

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.

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. According to the U.S. Census (2013), 50.7% of the population in the region is female and 49.3% is male. 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). Of that, just over half (54%) are between 30 and 54. 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). Minority populations are growing in the region, accounting for nearly 16% of the population in 2013.

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.

Lincoln County:

Population: 46,560
Area: 980 sq. mi.
Per Capita Income: \$24,354
County Seat: Newport

Benton County:

Population: 87,725
Area: 676 sq. mi.
Per Capita Income: \$26,177
County Seat: Corvallis

Linn County:

Population: 118,665
Area: 2,291 sq. mi.
Per Capita Income: \$22,165
County Seat: Albany

Lane County:

Population: 356,125
Area: 4,554 sq. mi.
Per Capita Income: \$23,869
County Seat: Eugene

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 (seven %) accounting for the remainder.

SWOT Summary

The CEDS 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 Region. The following sub-sections summarize the SWOT analysis findings. The SWOT results helped to frame and guide the formation of the CEDS goals, objectives, strategies, and actions. Refer to Appendix F for additional information. This section, together with information contained elsewhere in this report, satisfies 13 C.F.R. § 303.7(b)(ii).

Marketable Strengths

The CWEDD has a unique set of strengths. Survey responses and stakeholder comments specifically identified growth in the medical supply, maritime industry, and research clusters as key strengths in the region. In addition, the amount of agriculture and food industries contribute to the region's position in the state.

The following lists, grouped by category, present additional strengths identified during the SWOT analysis.

Connectivity:

- Direct access to interstate 5
- Multi-use ocean ports for fishing, research and trade
- Local, regional, national and international rail network
- Freight infrastructure

Supportive Business Climate

- Adaptive and attractive building code processes
- Small business support (e.g. chambers of commerce, Cascades West Financial Services)
- Workforce training centers

Culture of Innovation

- Business incubators and accelerators (e.g. Regional Accelerator & Innovation Network (RAIN), FertiLab)
- Research institutes and higher education institutions
- Proven track record of successful business starts (e.g. Nike, Garage Games, Molecular Probes)

Technical Support

- Councils of Government (LCOG, OCWCOG)
- UO Economic Development Administration University Center
- Multiple economic development related non-profits and foundations

Regional Weaknesses

The CWEDD is a large and diverse region. Due to the range in size, scale and resource base of the local economies, a lack of agreement on regional economic development priorities exists. Real and perceived divides exist between rural and urban areas; coast, valley and mountain; and COG territories.

The following lists, grouped by category, present additional weaknesses identified during the SWOT analysis.

Connectivity:

- Limited east-west connectivity
- Lack of rail connections to the coast
- Limited regional airport service
- Lack of available and accessible regional public transportation
- Lack of multi-modal transfer stations between valley and coast

Institutional Barriers

- Lack of regional brand
- High demand for and limited supply of affordable housing
- Limited regional collaboration and partnership
- High demand for and limited supply of technical assistance to communities
- Government regulations (too many)

Demographics

- Relatively small population
- Aging population and increasing number of retirees
- Lack of skilled labor force (not enough trained workers)

Infrastructure

- Aging physical infrastructure (e.g. transportation, water, sewer, etc.)
- Lack of financial support services for startups
- Limited access to infrastructure financing

District-Wide Opportunities

The overall perception is that the region is filled with unrealized potential. Specifically, survey respondents, project stakeholders and members of the CWEDD Board all emphasized increased regional coordination and collaboration as a key economic development opportunity. Other themes included promotion of the region's livability, available employment opportunities, existing maritime trade and research facilities, and premier educational and research assets.

The following lists present additional opportunities identified during the SWOT analysis.

- Quality of place for growing population segments (i.e. retirees, families, aging baby boomers, climate migrants, etc.)
- Growing trade between US and Asia
- Enterprise zones
- Access to available capital
- Increasing higher education enrollment
- Growing national and international economies
- Increase economic diversity across the region
- Workforce training and education
- New and expanding markets (e.g. value-added forest products, marijuana, tourism, craft beer and wine, etc.)
- 'Green business'
- Renewable energy
- 'Lay-down' areas for multi-modal freight transfers
- California and Washington markets
- Growing national and international economies

Potential Threats

The CWEDD is vulnerable to a number of internal and external threats. Notably, many of these are tied to the region's natural resources and location. For example, the region is susceptible to chronic (e.g. flood) and catastrophic (e.g. subduction zone earthquake and tsunami) natural hazards.

The following lists, grouped by category, present additional threats identified during the SWOT analysis.

Disaster Events

- Chronic natural hazards (e.g. floods, winter storms, wildfires, landslides, etc.)
- Catastrophic natural hazards (e.g. Cascadia subduction zone earthquake and tsunami)
- Long-term impacts from climate change

Miscellaneous

- Lack of affordable housing stock
- National/international economic downturn
- High housing costs relative to wages
- Declining natural resource availability

Coordination

- Jurisdictional competition within the region
- Lost economic development opportunities (due to lack of collaboration)
- Duplication of efforts
- Competition from other metro areas
- Shift from resource and manufacturing to service based economy

Taxes

- Decreasing gas tax revenue
- Uncertain state tax structure

STRATEGIC ACTION PLAN

The Strategic Action Plan outlines how the Cascades West Economic Development District (CWEDD) plans to facilitate economic development in the Cascades West region. This section presents the District's vision and the specific goals, objectives, strategies, and actions for the Comprehensive Economic Development Strategy (CEDS). More information about the process and the specific action items is located in Appendices A and E. This section, together with information contained elsewhere in this report, satisfies 13 C.F.R. § 303.7(b)(iii).

Regional Economic Vision

The 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 Action Plan. 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. The vision for the 2015-2020 CEDS is as follows:

The District's preferred future includes a growing and diversified economy with 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.

Plan Structure

The Strategic Action Plan describes the District's approach to achieving this vision over the next five years. The 2015-2020 CEDS Action Plan is presented later in this section and is structured as follows:

- Goals: The goals are broad statements that describe the District's overarching aspirations for economic development in the region.
- Objectives: Objectives are closely tied to goals. They describe the specific and measurable milestone to work towards in order to achieve each goal.
- Strategies: A strategy describes a plan of action and approach designed to achieve each objective.
- Actions: Actions describe the specific steps needed to implement the listed strategy.

CSC and the District designed each goal and its respective objectives, strategies, and actions to be S.M.A.R.T.: Specific, Measurable, Attainable, Relevant, and Time-Oriented. The S.M.A.R.T. approach makes sure that an action plan is designed for success, and that goals are actually attainable and realistic. Aligning the action plan to these five criteria is vital to making progress towards the CEDS vision and seeing concrete results of the regional economic development approach.

The District Board updated the 2015-2020 CEDS Goals based on discussions and public feedback. Four of the goals listed in the 2010-2015 CEDS remain in the update, with minor adjustments (Goals 2, 3, 5, and 6). Two of the previous goals pertaining to technical and infrastructure support, were combined into Goal 4. The Board added and prioritized Goal 1 (regional collaboration) in response to an identified need to promote more coordination among economic development efforts in the region. In summary, the 2015-2020 CEDS Goals are:

Goal 1: Create partnerships needed for regional collaboration

Goal 2: Advance economic activities that increase access to and provide a range of employment opportunities

Goal 3: Build on region's entrepreneurial culture and assets through collaborative means

Goal 4: Identify and leverage internal and external funding sources to fund projects that increase the resilience (diversity and redundancy) of infrastructure systems throughout the district

Goal 5: Partner to connect workforce training, education, and employment opportunities with workforce demand

Goal 6: Enhance the visibility of community assets and accessibility of basic services in rural areas

Once the CEDS goals were agreed upon, CSC worked with the Board to develop sets of Objectives, Strategies, and Actions. The Board tailored the objectives and strategies to capitalize on specific opportunities and address specific challenges in the region. Each goal is listed with its respective considerations that describe what these barriers are and why it is important for the District to address them over the next five years.

The actions listed below briefly describe the specific steps the District will need to take in 2015-2020 to promote regional economic development. More information about these actions including rationale, ideas for implementation, champions, potential partners and funding sources, and estimated costs and time considerations can be found in Volume II, Appendix A. The following section, Implementation, describes how the District intends to successfully execute the 2015-2020 CEDS.

Goal I Create partnerships needed for regional collaboration

Considerations: 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. Such collaboration can include partnering to compile and disseminate information, to promote regional events, to create job clusters, and to update future iterations of this CEDS document.

<u>Objective 1.1:</u> Implement a regional, asset-based, S.M.A.R.T. Comprehensive Economic Development Strategy (CEDS), which expands public, private and non-profit collaboration with a common strategic vision.	Strategy 1.1.1: Make the CEDS the principle document for regional collaboration on economic development and economic resilience.	Action 1.1.1.1: Create and maintain a CWEDD website to function as an information hub for the region by 2016. [High Priority Action]
		Action 1.1.1.2: Create a regional economic development organization chart that clearly identifies the linkages and roles of all economic development agencies. [High Priority Action]
<u>Objective 1.2:</u> Develop a collaborative regional economic development ecosystem that enables local community, economic, workforce development and planning practitioners to be as successful as possible.	Strategy 1.2.1: Promote the regional economic development strategy through active communication, regional working groups, and leadership curriculum.	Action 1.2.1.1: Create and convene at least annually four working groups to be responsible for implementation and monitoring of each goal/priority area identified in this CEDS. [High Priority Action]
		Action 1.2.1.2: Identify and/or partner within existing organizations to offer leadership training opportunities to build the capacity of regional leaders to collaboratively guide, manage and lead the regional economy.

Goal 2 Advance economic activities that increase access to and provide a range of employment opportunities.

Considerations: 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.

<u>Objective 2.1:</u> Broadcast a message regionally, nationally, and internationally, that the Cascades West region is a desirable place for businesses to locate and grow by highlighting our strengths in workforce, education, leisure, and healthcare.	Strategy 2.1.1: Develop internal (within Cascades West Region) and external branding and marketing plan.	Action 2.1.1.1: Complete a regional marketing research report with recommendations for the CWEDD board.
		Action 2.1.1.2: Capitalize on and align branding efforts in the region that align with the promotion of key industries outlined within the CEDS.
		Action 2.1.1.3: Establish a committee to review quality of place concepts and happiness index methodologies and make a recommendation to the CWEDD board by summer 2017 on whether or not to craft a set of appropriate regional metrics.
	Strategy 2.1.2: Align tourism promotion with regional marketing strategy.	Action 2.1.2.1: Coordinate the inclusion of regional branding language on local jurisdictions' and the State of Oregon's tourism promotion efforts. [High Priority Action]
<u>Objective 2.2:</u> Improve business environment to encourage retention, expansion, attraction, and resilience of businesses that provide living wage jobs.	Strategy 2.2.1: Support the development of existing and new business.	Action 2.2.1.1: Create and promote a database of incubators, accelerators, capital sources and support services available in the region by 2016. [High Priority Action]
		Action 2.2.1.2: Establish a network of local and regional navigators to help entrepreneurs through permitting and other processes by 2016.
		Action 2.2.1.3: Increase the availability of educational opportunities to regional businesses interested in international trade on the advantages of exporting their goods and services.
	Strategy 2.2.2: Adopt a business development strategy for businesses in target clusters.	Action 2.2.2.1: Working groups will agree on two to three of the following business clusters to focus business development efforts on over the next five years: software/technology; food and beverage; education technology/research; advanced manufacturing; value-added forest products; university-related spinoffs; health; marine; agriculture; bioscience; and natural textiles. [High Priority Action]

Goal 3 Build on region's entrepreneurial culture and assets through collaborative means.

Considerations: Entrepreneurs continue to be a significant economic generator in the region. Their efforts expand existing sectors, create new sectors that diversify the economy and generate most of the region's job growth. With macro-level economic changes – from globalization to shifting market structures – the regional economy will require a continued in-flux of fresh energy from new and existing businesses. In order to empower entrepreneurs in the region, The District will need to be proactive, responsive, flexible, coordinated, and innovative.

<u>Objective 3.1:</u> Support and strengthen existing network of business accelerators to facilitate information sharing, encourage partnerships and improve coordination of efforts in the region.	Strategy 3.1.1: Coordinate the formalization of a regional innovation network.	Action 3.1.1.1: Organize a forum on regional innovation networking by the end of June 2016. [High Priority Action]
	Strategy 3.1.2: Connect innovation network with all educational institutions, business development centers, and existing businesses to foster the culture of entrepreneurship.	Action 3.1.2.1: Facilitate annual fall meetings with representatives from educational institutions to build connections between regional needs, and academic course offerings.
		Action: 3.1.2.2: The CWEDD will develop and implement a strategy for increasing business visibility, involvement, and entrepreneurial education into local schools by 2017. [High Priority Action]
		Action: 3.1.2.3: Prepare and promote an inventory of resources available to entrepreneurs by December 2016 through a combination of mixed media such as a website, listserv, or social media. [High Priority Action]

Goal 4 Identify and leverage internal and external funding sources to fund projects that increase the resilience (diversity and redundancy) of infrastructure systems throughout the district

Considerations: 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. OCWCOG and LCOG are uniquely positioned to help provide technical assistance and connect specific projects with other resources (e.g. Regional Solutions Teams, University based programs, state and federal agency partners, etc.).

Objective 4.1: Increase regional visibility and use of CWEDD and COGs to amplify regional knowledge of funding information and resources available over the next five years.	Strategy 4.1.1 - Increase promotion of available services and funding sources that can be accessed via CWEDD.	Action: 4.1.1.1: Create a section in the CWEDD Website to list current funding opportunities for local jurisdictions by December 2016. [High Priority Action]
	Strategy 4.1.2 - Identify and prioritize projects of regional importance that improve the quality of place for residents. (green space, multi-modal transportation options, affordable housing stock, arts & culture)	Action 4.1.2.1 CWEDD will work with OCWCOG and LCOG to complete a Regional Needs Assessment by summer of 2016. [High Priority Action]
		Action 4.1.2.2: CWEDD in cooperation with LCOG and OCWCOG will create a quarterly newsletter or email blast on a bi-monthly or quarterly basis which informs on grant deadline dates, eligibility information, current and planned projects, and other funding opportunities.
Objective 4.2 - Increase capacity to support grant writing and technical project development needs for jurisdictions in the region.	Strategy 4.2.1 - Increase planning and grant writing assistance.	Action 4.2.1.1 CWEDD will publish and annually update an inventory of existing grant writing and proposal development resources at LCOG, OCWCOG, and other economic development agencies in the region.
		Action 4.2.1.2 - Create a database to share available resources with all regional communities containing a bank of past grant proposals and technical projects, and increase the number of staff hours available to smaller communities.

Goal 5 - Partner to connect workforce training, education, and employment opportunities with workforce demand.

Considerations: Many businesses in the District report that they are struggling to find qualified employees for a range of skilled, semi-skilled and unskilled positions. 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 District. Using research to analyze current and future job demand, the CWEDD can help link education, training, apprenticeships and career planning to the employment needs of existing and emerging business sectors.

<u>Objective 5.1:</u> Increase the size and quality of the workforce by connecting and aligning education and workforce development programs to develop the region's current and future talent supply chain and meet employer needs.	Strategy 5.1.1: Coordinate the efforts of Workforce Investment Boards (WIBs) and educational institutions in the region to help identify and provide for current employer needs.	Action 5.1.1.1: Assess the workforce development system in the region and make recommendations to the CWEDD Board about the CWEDD's role in supporting coordination among workforce development organizations. [High Priority Action]
		Action 5.1.1.2: 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. [High Priority Action]
<u>Objective 5.2:</u> Retain and attract younger talent by increasing meaningful career opportunities.	Strategy 5.2.1: Identify and promote sectors with high growth and wage opportunities in order to retain and better attract young talent to the region.	Action 5.2.1.1: CWEDD will identify growing industries paying living wages as well as strategies and best practices to attract and retain talented professionals.
	Strategy 5.2.2: Identify and promote strategies that will improve the District's quality of place and livability.	Action 5.2.2.1: CWEDD will identify and promote strategies and best practices for improving factors of livability such as, quantity and access to affordable housing, alternative transportation options, quality healthcare and education, access to open spaces, and arts and culture.

Goal 6 - Enhance the visibility of community assets and accessibility of basic services in rural areas

Considerations: Rural communities have unique economic strengths and challenges. The intent of this goal is to promote the economic vitality of communities outside the region's metropolitan areas. The District's primary approach will be to integrate the urban and rural economies through tourism and recreation. Small communities may lack the local capacity, staffing, and funding resources necessary to undertake complex projects, such as infrastructure upgrades. Training and educational opportunities exist in the region, however distance and other challenges prevent rural communities from accessing those services. Lack of basic services, such as healthcare facilities and transportation options, can inhibit the attractiveness of rural areas to prospective residents and employers. Therefore, ensuring equitable access to basic services for residents and businesses in rural areas is a critical strategic opportunity.

Objective 6.1: Increase the economic vitality and resilience of rural areas in the region.	Strategy 6.1.1 - Promote and expand eco-tourism, marine-related activities, sustainable farming, local vineyards and food production by adopting a regional approach to rural economic development.	Action: 6.1.1.1: In partnership with local Main Street programs, identify and support downtown revitalization projects in rural communities each year. [High Priority Action]
		Action: 6.1.1.2: Partner with Travel Oregon and other local tourism agencies to develop and market local value-added products.
	Strategy 6.1.2 - Facilitate the expansion of value-added natural resource industries by connecting rural entrepreneurs to innovation networks and support services.	Action 6.1.2.1: The rural economic development working group will create a communication strategy to customize and promote rural innovation services from the regional innovation network in order to spur entrepreneurial growth in rural communities.
	Strategy 6.1.3 - Meet the economic needs of rural communities by diversifying and distributing needed services -such as energy, transportation, food, water, communication, etc. – across the region.	Action: 6.1.3.1: The rural economic development working group will use the results of the regional needs assessment (refer to Action 4.1.2.1) to identify, prioritize, and recommend a set of rural area “projects of regional significance” to the CWEDD Board by 2017. [High Priority Action]
		Action: 6.1.3.2: The rural economic development Working Group will partner with private sector businesses to ensure at-risk job sectors in specific communities are resilient to succession.

IMPLEMENTATION

To realize the objectives of its Comprehensive Economic Development Strategy (CEDS), the District needs to adopt a realistic plan that allows for the timely implementation of action items. This section presents the implementation plan for the 2015-2020 CEDS. First, it describes changes to the organizational structure of the District. The remainder of the section presents a proposed timeline for implementation and a plan for measuring progress on action items over the five-year period. This section, together with information contained elsewhere in this report, satisfies 13 C.F.R. § 303.7(b)(iii).

District Structure and Collaboration Framework

Stakeholders in the region identified a strong desire for increased collaboration. However, participants indicated that the District currently lacks the structure necessary for this to occur. Based on discussions with the OCWEDD Board/CEDS Strategy Committee, CWEDD Staff, OCWCOG and LCOG Economic Development Staff as well as conversations with EDA West Coast Regional Staff, the 2015-2020 CEDS proposes the following changes to the District structure to increase collaboration and administrative efficiency.

First, the 2015-2020 CEDS formally acknowledges the CWEDD Board as the district's governing body. The CWEDD Planning Organization² staff reports to the CWEDD Board.

Second, the 2015-2020 CEDS creates four Working Groups:

- Regional Economic Development Practitioners Working Group
- Entrepreneurship and Innovation Working Group
- Workforce Development Working Group
- Rural Development Working Group

The primary purpose of the Working Groups is to ensure implementation of the CEDS. In addition, the Working Groups will serve as a forum for sharing ideas and coordinating regionally significant economic development activities. Additional information about the Working Groups is presented below.

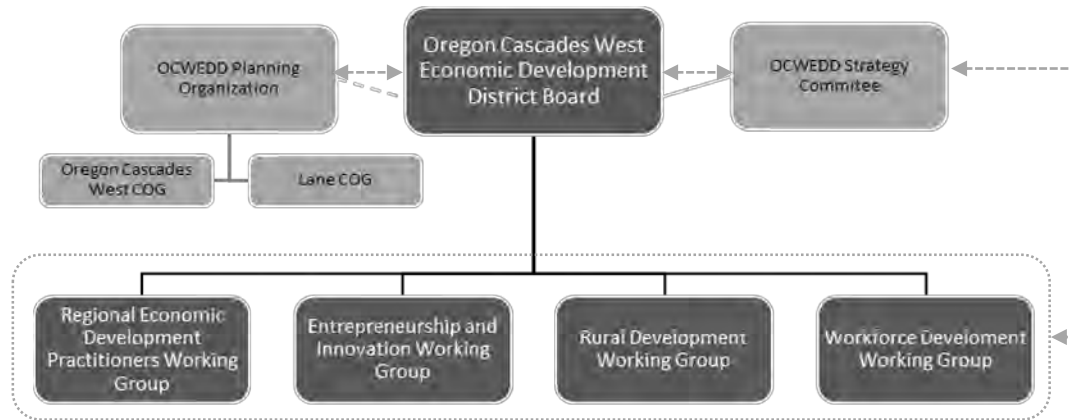
Third, the 2015-2020 CEDS proposes formal appointment of a Strategy Committee³ to represent the primary economic interests of the CWEDD in updating and implementing the CEDS. Under Goal 1 of this plan, the CWEDD Board will meet

² At present, the Oregon Cascades West Council of Governments (OCWCOG) functions as the EDA defined Planning Organization. OCWCOG collaborates with the Lane Council of Governments (LCOG) to provide economic development planning services and support to the OCWEDD.

³ The Strategy Committee is the committee identified by the Planning Organization as responsible for the development, implementation, revision or replacement of the CEDS.

during year one of the update cycle to formally appoint and convene the Strategy Committee.

Figure 4.1: Proposed District Administrative Structure



Source: 2015-2020 CEDS

Cascade West Economic Development District Board

The District Board has input and oversight in all CWEDD activities. The District Planning Organization staff reports to the District Board. Following is a summary of the purpose, composition and meeting schedule for the CWEDD Board as currently outlined in the CWEDD Governing Board bylaws. Under Goal 1 of this plan, the CWEDD Board will review and update the CWEDD Governing Board Bylaws in accordance with the amended (most current) version of CFR 303 during the 2015-2020 implementation cycle.

Purpose

The purpose of the Board is to serve as the governing body of the District.

Composition

The District's bylaws state that the Board is comprised of 20 members. Representatives from the Oregon Cascade West Council of Government's (OCWCOG) Executive Committee and the Executive Board for the Lane Council of Government's (LCOG) are specifically identified. Other representatives are determined by the District's Articles of Agreement. The CEDS Implementation Strategy does not propose any changes to the composition of the Board.

Meeting Time

The District's by-laws require that the Board meets at least one time per year.

Working Groups

Each of the proposed Working Groups will focus on completing specific actions outline in the strategic action plan. In addition, the working groups will identify projects of regional significance that may qualify for funding from outside sources, including the EDA. Projects will be listed, as identified, on the CEDS Project List (see Volume II, Appendix B) The CEDS proposes that each Working Group meet on a quarterly basis for the first year and then determine the appropriate frequency of subsequent meetings. Suggested Working Group member lists are proposed below. We anticipate that each working group will consist of six to ten members. The purpose for each of the Working Group is also outlined below. Note that some of the working groups focus on specific activities related to a relevant goal, while others focus on a particular strength or opportunity in the District. Additional information for each working group is presented below.

Regional Economic Development Practitioners Working Group

Purpose:

The purpose of this group is to facilitate collaboration and idea sharing among economic development practitioners in the District. The group would be composed of economic development coordinators and practitioners from within the District. The Working Group will focus on business retention, expansion, and attraction efforts in the District, as well as issues of livability and talent retention and attraction. The group will also serve as a forum for practitioners to report on economic development efforts in their jurisdiction.

Potential Members:

The Board should look at filling member vacancies on the Regional Economic Development Practitioners Working Group with economic development practitioners from the two Councils of Government, counties, local jurisdictions, ports, and tribes in the District. Other possible Working Group members could include representatives from chambers of commerce, educational institutions and small business development centers, Destination Marketing Organizations (DMOs) in the District, from the Board.

Meeting Times

The Regional Economic Development Practitioners Working Group will meet on a quarterly basis during the first year. The Working Group will determine subsequent meeting times based on their anticipated workload for years two through five.

Entrepreneurship and Innovation Working Group

Purpose:

Entrepreneurs continue to be a significant economic opportunity in the District. Their efforts expand existing sectors, create new sectors that diversify the economy and generate job growth in the District. This Working Group focuses on developing the network of business accelerators through organization of a regional

innovation forum, maintaining open communication with educational institutions, creating educational programming around entrepreneurialism, and promoting entrepreneurial resources through an inventory of assets and resources in the District.

Potential Members:

The Entrepreneurship & Innovation Working Group should be comprised of representatives from regional accelerators, NOAA, ONAMI, K-12 and post-secondary educational institutions, regional Workforce Investment Boards (WIBs), the private sector, and the Board.

Meeting Times

The Entrepreneurship and Innovation Working Group will meet twice during the first year. One of the actions this group will be implementing is to develop an annual forum on innovation. This action will require the Working Group to meet outside of the scheduled meetings during the first year. The Working Group will determine meeting times for developing this forum.

Workforce Development Working Group

Purpose:

Many businesses in the District report that they are struggling to find qualified employees for a range of skilled, semi-skilled and unskilled positions. As the District's economy transitions from a resource-based to a service-based economy, helping workers transition from declining and into growing industries will be a significant opportunity for the District. The purpose of this Working Group is to help coordinate and align the efforts of Workforce Investment Boards in the District. Given the District's strength in post-secondary education, this Working Group will focus and prioritize workforce development resources on retaining post-secondary program graduates and connecting them with employment needs in the District.

Potential Members:

Potential members of the Workforce Development Working Group will consist of representatives from the regional WIBs, local vocational and secondary education institutions, the private sector, other pertinent state and local agencies, and the Board.

Meeting Times

The Workforce Development Working Group will meet on a quarterly basis during the first year. The Working Group will determine subsequent meeting times based on their anticipated workload for years two through five.

Rural Development Working Group

Purpose:

Rural communities have unique economic strengths and challenges. Rural communities may lack the local capacity, staffing, and funding resources necessary to undertake complex projects, such as infrastructure upgrades. This Working Group focuses on increasing the economic vitality and resilience of rural areas in the District by promoting rural tourism ventures, revitalizing rural downtowns, connecting rural entrepreneurs to innovation networks, and diversifying and distributing basic services.

Potential Members:

Board members representing rural communities are ideal candidates for membership in the Rural Development Working Group. The Working Group should also consist of members from rural chambers of commerce and from non-profit organizations and foundations that focus on rural development issues.

Meeting Times:

The Rural Development Working Group will meet on a quarterly basis during the first year. The Working Group will determine subsequent meeting times based on their anticipated workload for years two through five.

CWEDD Strategy Committee

Consistent with federal guidelines, the CWEDD Strategy Committee is responsible for representing the district in “implementation, revision, or replacement” of the CEDS.

Purpose

The primary purpose of the Strategy Committee is to ensure that the CEDS is used to guide regionally significant economic development activities and projects in the region. Specifically, the Strategy Committee will meet the objectives of this plan through implementation of the actions presented herein. In addition, the Strategy Committee is responsible for maintaining and updating the CEDS.

Composition

In accordance with 13 C.F.R. § 303.6(b)(i), the strategy committee shall include representatives from the following: private sector, public sector (including public officials and elected representatives), community leadership, community members, workforce development board members, institutions of higher education, minority and labor groups, and others. Moving forward, the Strategy Committee will consist of representatives the District Board and members of the four Working Groups identified above. Additional Strategy Committee members will be identified as needed to ensure compliance with 13 C.F.R. § 303.6(b)(i).

Meeting Time

The full Strategy Committee will meet at the discretion of the District Board. To facilitate active implementation of the action plan, the CEDS recommends that the full Strategy Committee meet at least once and up to four times per year.

CEDS Five-Year Implementation Schedule

The EDA requires that CEDS be updated every five years. Plan implementation and maintenance is a critical component of the CEDS. This section presents a five-year schedule and generalized work program. The schedule is intended to identify critical path activities, where applicable. As the board and working groups meet, we anticipate that the schedule may change as project opportunities arise, priorities change and annual work programs are developed. OCWCOG will have primary responsibility for overseeing the schedule in consultation with LOCG and the District Board. Ideally, all of the actions outlined herein will be completed within the next five years.

Year 1 Activities

Activities in the first year will focus on establishing the updated collaboration for the district. Priorities will include establishing the working groups and publicizing the CEDS to stakeholders throughout the district.

- Revamp CWEDD website (1.1.1.1) – (1)
- Form four Working Groups: Workforce Development, Rural Development, Economic Development Practitioners, Entrepreneurship & Innovation (1.2.1.1 & 1.2.1.4 & 6.1.1.1) – (1)
- CWEDD Board members begin promoting CEDS locally (1.2.1.2) – (O)
- Appoint and convene Strategy Committee

Year 2 Activities

Activities in the second year will continue to focus on regional collaboration. Specific projects in the second year include the development of key resources – technological and human – that will support action item completion in years three through five. In addition, promotion of the district through strategic partnerships will be a secondary focus in year two.

- Regional Collaboration:
 - Create regional economic development organizational chart (1.1.1.2) – (1)
 - Board members continue to promote CEDS within their communities and jurisdictions (1.2.1.2) – (O)
- Economic Development:
 - Conduct regional marketing research report (2.1.1.1) – (1)
 - Promote key industries (2.1.1.2) – (LD)

- Include regional branding language in promotional efforts (2.1.2.1) – (1)
- Create a database of business services in District (2.2.1.1) – (1)
- Establish network of navigators for entrepreneurs (2.2.1.2) – (O)
- Focus development strategies on key clusters (2.2.2.1) – (O)
- Entrepreneurship & Innovation:
 - Regional Innovation networking forum (3.1.1.1) – (A)
 - Annual meeting with educational institutions (3.1.2.1) – (O)
- Technical Support:
 - Current funding opportunities on CWEDD website (4.1.1.1) – (1)
 - Regional needs assessment (4.1.2.1) – (A)
 - Grant and proposal resource inventory (4.2.1.1) – (O)
- Workforce Development:
 - Assess workforce development system (5.1.1.1) – (1)
 - Identify strategies for improving quality of place (5.2.2.1) – (LD)
- Rural Development:
 - Support downtown revitalization projects (6.1.1.2) – (O)
 - Communication strategy promoting rural innovation (6.1.2.1) – (O)
 - Identify regionally significant projects (6.1.3.1) – (O)

Year 3 Activities

Year three will primarily involve continuation of activities initiated in years one and two. An important new activity anticipated in year three will be conducting a needs assessment. This work will set the stage for the initiation of the next plan update process that will commence in year five.

- Regional Collaboration:
 - Leadership training opportunities (1.2.1.3) – (O)
 - Board members continue to promote CEDS
- Economic Development:
 - Finish action 2.1.1.2 (promote key industries)
 - Form quality of place committee (2.1.1.3) – (O)
 - Continue action 2.2.1.2 (network of nav. for entrepreneurs)
 - Increase education on international trade (2.2.1.3) – (LD)
 - Continue action 2.2.2.1. (focus dev. Strategies on key clusters) – (O)
- Entrepreneurship & Innovation

- Increase entrepreneurial education in K-12 (3.1.2.2) – (O)
- Continue actions 3.1.1.1 (annual innovation forum) and 3.1.2.1 (annual meeting with educational institutions)
- Technical Support:
 - Regional needs assessment (4.1.2.1)
 - Continue action 4.2.1.1 (inventory of grant and proposal resources)
- Workforce Development:
 - Increase participation in apprenticeship programs (5.1.1.2) – (LD)
 - Identify high wage and growth sectors (5.2.1.1) – (LD)
- Rural Development:
 - Continue action 6.1.1.2 (support downtown projects) – (O)
 - Develop and market value-added products (6.1.1.3) – (O)
 - Continue action 6.1.3.1 (identify projects of regional significance) – (O)
 - Work with business on issues of succession (6.1.3.2) – (O)

Year 4 Activities

A primary focus of year four will be completion and closeout of discrete activities commenced in years one through three. Ongoing activities will continue in year four. In addition, the board will begin to establish desired outcomes for the 2020 plan update process in year four.

- Regional Collaboration:
 - Leadership training opportunities
 - Board continues to promote CEDS
- Economic Development:
 - Continue action 2.1.1.3 (quality of place committee) – (O)
 - Continue action 2.2.1.2 (network of nav. for entrepreneurs) – (O)
 - Finish action 2.2.1.3 (education on international trade) – (LD)
 - Continue action 2.2.2.1 (focus dev. strategies on key clusters) – (O)
- Entrepreneurship & Innovation
 - Continue actions 3.1.1.1 (annual innovation forum) and 3.1.2.1 (annual meeting with educational institutions)
 - Continue action 3.1.2.2 (increase entrepreneurial education in K-12) – (O)
 - Resource inventory for entrepreneurs (3.1.2.3) – (1)
- Technical Support:
 - Regional needs assessment (4.1.2.1)

- Continue action 4.2.1.1 (inventory of grant and proposal resources)
- Workforce Development:
 - Continue 5.1.1.2 (increase participation in apprenticeship programs) – (O)
 - Finish 5.2.1.1 (identify high wage and growth sectors)
- Rural Development:
 - Continue 6.1.1.2 (support downtown projects) – (O)
 - Continue 6.1.1.3 (value-added products) – (O)
 - Continue 6.1.3.1 (projects of reg. significance) – (O)
 - Continue 6.1.3.2 (succession issues) – (O)

Year 5 Activities

The dual focus of year five will be (1) close out and evaluation of all 2015-2020 CEDS activities, and (2) completion of the 2020-2025 CEDS update.

- Regional Collaboration:
 - Leadership training opportunities
 - Board members continue to promote CEDS
- Economic Development:
 - Continue action 2.1.1.3 (quality of place committee) – (O)
 - Continue action 2.2.1.2 (network of nav. for entrepreneurs) – (O)
 - Continue action 2.2.2.1 (focus dev. strategies on key clusters) – (O)
- Entrepreneurship & Innovation:
 - Continue actions 3.1.1.1 (annual innovation forum) and 3.1.2.1 (annual meeting with educational institutions)
 - Continue action 3.1.2.2 (increase entrepreneurial education in K-12) – (O)
- Technical Support:
 - Regional needs assessment (4.1.2.1)
 - Continue action 4.2.1.1 (inventory of grant and proposal resources)
- Workforce Development:
 - Continue action 5.1.1.2 (increase participation in apprenticeship programs) – (O)
- Rural Development:
 - Continue 6.1.1.2 (support downtown projects) – (O)
 - Continue 6.1.1.3 (value-added products) – (O)

- Continue 6.1.3.1 (projects of reg. significance) – (O)
- Continue 6.1.3.2 (succession issues) – O)

Summary

Figure 3.1 on the following page presents a summary of the schedule and timeline by goal.

Figure 3.2: CEDS Action and Implementation Schedule

Goal	Actions (abbreviated for table)	Y1	Y2	Y3	Y4	Y5
Regional Collaboration	1.1.1.1: CWEDD website (1)					
	1.1.1.2: Regional economic development organization chart (1)					
	1.2.1.1: Form Working Groups for CEDS implementation (1)					
	1.2.1.2: Leadership training opportunities (O)					
Economic Development	2.1.1.1: Regional marketing research report (1)					
	2.1.1.2: Capitalize on efforts that promote key industries (LD)					
	2.1.1.3: Quality of place review committee (O)					
	2.1.2.1: Inclusion of regional branding language (1)					
	2.2.1.1: Database of business services in District (1)					
	2.2.1.2: Establish network of navigators for entrepreneurs (O)					
	2.2.1.3: Increase education on international trade (LD)					
	2.2.2.1: Focus development strategies on key clusters (O)					
	3.1.1.1: Annual regional innovation networking forum (A)					
Entrepreneurship & Innovation	3.1.2.1: Hold annual meeting with educational institutions (O)					
	3.1.2.2: Increase entrepreneurial education in K-12 (O)					
	3.1.2.3: Resource inventory for entrepreneurs (1)					
	4.1.1.1: Current funding opportunities on CWEDD website (1)					
Technical Support	4.1.2.1: Regional needs assessment (A)					
	4.2.1.1: Inventory of grant and proposal resources (O)					
	4.2.1.2: Database of past grant proposals and technical projects (LD)					
	5.1.1.1: Assess workforce development system (1)					
Workforce Development	5.1.1.2: Increase participation in apprenticeship programs (O)					
	5.2.1.1: Identify high wage and growth sectors (LD)					
	5.2.2.1: Identify strategies for improving livability (LD)					
	6.1.1.1: Support rural downtown revitalization projects (O)					
Rural Development	6.1.1.2: Develop and market value-added products (O)					
	6.1.2.1: Communication strategy promoting rural innovation (O)					
	6.1.3.1: Identify projects of regional significance (O)					
	6.1.3.2: Work with businesses on issues of worker succession (O)					

Key: (1) one time project; (O) ongoing project; (A) annual project; (LD) limited duration project; **Bold** indicates High Priority Action

Source: Community Planning Workshop

Figure 3.3: Complete CEDS Action Matrix

Goal	Objective	Strategy	Actions (abbreviated for table)
Regional Collaboration	1.1: Implement CEDS	1.1.1: CEDS is principle document for regional collaboration and resilience	1.1.1.1: CWEDD website (1) 1.1.1.2: Regional economic development organization chart (1)
	1.2: Develop a collaborative regional economic ecosystem	1.2.1: Promote CEDS through active communication	1.2.1.1: Form Working Groups for CEDS implementation (1) 1.2.1.2: Leadership training opportunities (O)
Economic Development	2.1: Broadcast strengths & opportunities of region	2.1.1: Develop an internal and external branding and marketing plan	2.1.1.1: Regional marketing research report (1) 2.1.1.2: Capitalize on efforts that promote key industries (LD) 2.1.1.3: Quality of place review committee (O)
		2.1.2: Align tourism promotion with regional marketing strategy	2.1.2.1: Inclusion of regional branding language (1)
	2.2: Improve business environment	2.2.1: Support development of existing and new businesses	2.2.1.1: Database of business services in District (1) 2.2.1.2: Establish network of navigators for entrepreneurs (O) 2.2.1.3: Increase education on international trade (LD)
		2.2.2: Adopt a business strategy for target clusters	2.2.2.1: Focus development strategies on key clusters (O)
Entrepreneurship & Innovation	3.1: Support and strengthen existing network of regional accelerators	3.1.1: Coordinate the formalization of a regional innovation network	3.1.1.1: Annual regional innovation networking forum (A) 3.1.2.1: Hold annual meeting with educational institutions (O)
		3.1.2: Connect innovation network to education institutions, business development centers, and existing businesses	3.1.2.2: Increase entrepreneurial education in K-12 (O) 3.1.2.3: Resource inventory for entrepreneurs (1)
Technical Support	4.1: Increase the District's visibility and knowledge of funding opportunities	4.1.1: Promotion of services and funding accessed via CWEDD 4.1.2: Identify and prioritize projects of regional significance	4.1.1.1: Current funding opportunities on CWEDD website (1) 4.1.2.1: Regional needs assessment (A)
	4.2: Increase support capacity of District	4.2.1: Improve planning and grant writing assistance	4.2.1.1: Inventory of grant and proposal resources (O) 4.2.1.2: Database of past grant proposals and technical projects (LD)
Workforce Development	5.1: Increase size and quality of workforce by aligning efforts with regional needs	5.1.1: Coordinate efforts of Workforce Investment Boards	5.1.1.1: Assess workforce development system (1) 5.1.1.2: Increase participation in apprenticeship programs (O)
	5.2: Retain and attract talented professionals	5.2.1: Identify and promote high wage and growth sectors 5.2.2: Identify and promote strategies that improve livability	5.2.1.1: Identify high wage and growth sectors (LD) 5.2.2.1: Identify strategies for improving livability (LD)
Rural Development	6.1: Increase the economic vitality and resilience of rural areas	6.1.1: Promote and expand rural economic efforts by adopting a regional approach to rural development	6.1.1.1: Support rural downtown revitalization projects (O) 6.1.1.2: Develop and market value-added products (O) 6.1.2.1: Communication strategy promoting rural innovation (O)
		6.1.2: Connect rural entrepreneurs to innovation networks	6.1.3.1: Identify projects of regional significance (O)
		6.1.3: Help rural communities by diversifying and distributing basic services across the District	6.1.3.2: Work with businesses on issues of worker succession (O)

Key: (1) one time project; (O) ongoing project; (A) annual project; (LD) limited duration project; **Bold** indicates High Priority Action

Source: Community Planning Workshop

Performance Measurement

The U.S. Economic Development Administration (EDA) requires that CEDS include performance measurements to hold districts accountable to the actions listed in their strategies (refer to 13 C.F.R. § 303.7(b)(iv)). In addition, each Economic Development District is required to submit CEDS Annual Performance Report. In order to be held accountable for the implementation of the strategy, the Board will oversee the production of the annual report.

The annual CEDS report will include a status update on each of the individual action items. Appendix A, which presents more details on specific actions, includes potential measurements for each action. The District can utilize these as a starting point for measuring progress on each action. Additionally, the socioeconomic data presented in Appendix B are economic indicators that can be updated to reflect progress made with economic development in the region.

Beyond meeting the federal requirements, the annual reports will serve two purposes. The Board will use the annual reports to measure progress made on each action. This will be useful in identifying areas of weakness and determining whether there is a need to adjust implementation methods for individual actions or strategies. The reports will also be a useful tool for communicating to internal and external stakeholders the District's work and its impact on the regional economy. Being able to communicate the progress and successes of the District will be key to maintaining the momentum and support of the CEDS in the region.

Additional metrics the district will consider reporting if data is readily available include:

- Number of jobs created in the Region after implementation of the CEDS;
- Number and types of regionally significant investments undertaken in the Region;
- Number of jobs retained in the Region after implementation of the CEDS;
- Types and number of regionally significant private sector investments undertaken in the Region after implementation of the CEDS;
- Significant changes in the economic environment of the Region.

This Comprehensive Economic Development Strategy was prepared by –



With planning grant funding provided by the



U.S. Department of Commerce
Economic Development Administration

Comprehensive Economic Development Strategy, 2015-2020

Cascades West Economic Development District



September 2015

Volume II: Technical Appendixes

Prepared for:
Cascades West Economic Development District

Prepared by:



This Comprehensive Economic Development Strategy was prepared by –



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Approval of this document has been recommended by -

- Lane Economic Committee September, 2015
- Oregon Cascades West Council of Governments Community and Economic Development Committee September, 2015

For consideration by -

- Cascades West Economic Development District Board of Directors
- Lane Council of Governments Board of Directors
- Oregon Cascades West Council of Governments Board of Directors
- U.S. Department of Commerce Economic Development Administration

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- Bill Hall, County Commissioner, Lincoln County
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About the Community Service Center

The Community Service Center (CSC), a research center affiliated with the Department of Planning, Public Policy, and Management at the University of Oregon, 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 the CSC 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.

About Community Planning Workshop

Community Planning Workshop (CPW) is an experiential program within the Department of Planning, Public Policy and Management at the University of Oregon. Students work in teams under the direction of faculty and Graduate Teaching Fellows to develop proposals, conduct research, analyze and evaluate alternatives, and make recommendations for possible solutions to planning problems in Oregon communities. The CPW model is unique in many respects, but is transferable to any institution that desires to link pedagogy with community service.

About the EDA University Center

The University of Oregon Economic Development Administration University Center (EDAUC) is a partnership between the Community Service Center, the UO Department of Economics, the Oregon Small Business Development Center Network and UO faculty. The UO Center provides technical assistance to organizations throughout Oregon, with a focus on rural economic development. The UO EDAUC seeks to align local strategies to community needs, specifically with regards to building understanding of the benefits of sustainable practices and providing technical training to capitalize on economic opportunities related to those practices. The UO EDAUC is partially funded through a grant from the U.S. Department of Commerce, Economic Development Administration.

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APPENDIX A: ACTION ITEM FORMS

This section provides detailed descriptions of the action items presented in the Comprehensive Economic Development Strategy (CEDS) Volume 1. The descriptions are provided in order to assist the Cascades West Economic Development District in implementing the plan, and were developed based on research and feedback throughout the CEDS Update process.

Action Forms

In order to facilitate the successful implementation of the CEDS, Community Planning Workshop has provided tables with descriptive and supplemental information for each CEDS action item. Each action item is presented in a table that includes the following information:

- Aligns to Goals: Many of the actions presented in the Strategy align with more than one of the 6 CEDS Goals. This indicates which additional goals each action aligns with.
- Rationale: Action items should be fact-based and tied directly to needs or issues identified throughout the planning process. Action items were developed throughout the CEDS update process, and came from a number of sources including CWEDD Board members, stakeholders, and based on CPW’s analysis of the region’s challenges and opportunities. The rationale describes the reasoning and purpose of each action item and its role in the larger mission and vision of the CEDS.
- Ideas for Implementation: This outlines potential starting points for taking action. These take into consideration the CWEDD’s limitations in implementation and are designed to leverage existing resources in the region, as applicable. When an action is implemented, more work will be needed to determine the most appropriate course of action.
- Champion: The Champion(s) are the organization or entity that will coordinate the implementation of the action. They will be responsible for organizing resources, identifying funding sources, and monitoring and evaluating action implementation.
- Potential Partners: This identifies agencies and organizations who would be appropriate partners in coordination implementation of each action. These entities were identified by Community Planning Workshop and the CWEDD Board, though were not necessarily contacted during the development of the plan. The Champion should contact identified partner organizations to see if they are capable of or interested in participation and willing to commit time and/or resources to the efforts.
- Potential Funding Sources: Where possible, CPW identified potential funding sources for each action, and include existing resources in the region as well as external resources.
- Estimated Costs: Costs for each action were estimated using the following scale:
Low – <\$50K Medium – \$50-\$100K High – \$100K<

- Timeframe: The timeframe indicates the amount of time it would take to implement each action. The action forms use the following scale to determine timeframe:
Short – <6 months Medium – 6-12 Months Long – 12< months
- Potential Measurements: This outlines possible performance measurements that could be used to
- Staff Time: Estimated staff time was determined for both ongoing and one-time actions. These measurements are primarily applicable to staff at each action’s respective Champion organization. The following scale was used to estimate staff time:
Ongoing
Low – <0.2 FTE Medium – 0.2-0.4 FTE Long – 0.4< FTE
One-time
Low – <50 Hours Medium – 50-150 Hours Long – 150< Hour

Goal I: Create partnerships needed for regional collaboration.

Action 1.1.1.1		Create and maintain a CWEDD website to function as an information hub for the region by 2016. [High Priority Action]
Aligns with Goals:		1, 2, 3, 4, 5, 6
Rationale (Why is this important?)		
In order to support the regional branding strategy and to increase visibility and connectivity among existing services and agencies, the CWEDD will need a specific website. Currently, the information regarding the CWEDD and the current CEDS is available only as a page inside OCWCOG's website. The new website will be an information hub and should be used as a promotional tool for the updated CEDS.		
Ideas for Implementation (How will it get done?)		
The CWEDD can contract a web development company to design an appropriate web portal or can partner with universities for a service learning initiative. There are ready-made portal templates available in the market, which require simple customization.		
Champion(s)/Responsible Parties:		CWEDD
Potential Partners		Potential Funding Sources
Universities, Chambers of Commerce		CWEDD
Timeframe		Estimated Costs:
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)		☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☐ Low (<0.2 FTE) ☒ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☒ Medium (50-150 hours) ☐ Long (>150 hours)	One new website available.

Action 1.1.1.2	Create a regional economic development organization chart that clearly identifies the linkages and roles of all economic development agencies. [High Priority Action]	
Aligns with Goals:	1, 2, 4	
Rationale (Why is this important?)		
During the planning processes stakeholders identified overlaps in services and boundaries for entities working on economic development in the District. In order to support the regional integration process, a complete map of the existing agencies and services would help identify areas for further collaboration and avoid any duplication of efforts.		
Ideas for Implementation (How will it get done?)		
This will be an ongoing process, which will require the CWEDD to maintain and update periodically. The first step would involve organizing the information already known, followed by updates as more information is collected and as agencies or services change and/or expand. The resulting map would be available in the proposed CWEDD's website.		
Champion(s)/Responsible Parties:		CWEDD
Potential Partners		Potential Funding Sources
COGs, Chambers of Commerce, Workforce Boards		CWEDD
Timeframe		Estimated Costs:
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)		☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☒ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☒ Medium (50-150 hours) ☐ Long (>150 hours)	One new website available.

Action 1.2.1.1	Create and convene at least annually four working groups to be responsible for implementation and monitoring of each goal/priority area identified in this CEDS. [High Priority Action]	
Aligns with Goals:	1, 2, 3, 4, 5, 6	
Rationale (Why is this important?)		
The existence of a strategy does not guarantee any change unless responsible parties are appointed to it. Stakeholders identified several areas in which more action is needed to promote development and resilience in the District. The best approach to accomplishing that is the creation of working groups composed of stakeholders who identify themselves with each specific area of action. During the planning process we identified a need for groups focused on rural development, workforce development, entrepreneurship & innovation, and regional economic development.		
Ideas for Implementation (How will it get done?)		
The CWEDD can appoint self-identified members to the working groups, which can include representatives of agencies not represented on the CWEDD's Board. To increase awareness and collaboration, the working group's activities will be made available on the CWEDD's new website.		
Champion(s)/Responsible Parties:	CWEDD	
Potential Partners	Potential Funding Sources	
Varies according to each specific committee	CWEDD	
Timeframe	Estimated Costs:	
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)	☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)	
Staff Time	Potential Measurements:	
Ongoing ☐ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☒ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	Number of committees created, number of committee meetings held, and number of actions originated from committee work

Action 1.2.1.2		Identify and/or partner within existing organizations to offer leadership training opportunities to build the capacity of regional leaders to collaboratively guide, manage, and lead the regional economy.
Aligns with Goals:		1, 2, 3, 4, 5, 6
Rationale (Why is this important?)		
The CWEDD has several smaller jurisdictions that lack the capacity to hire staff solely dedicated to economic development. In such cases, economic development is attributed to city staff in management offices, planning staff, or to council members. This action is aimed at providing learning opportunities with a curriculum focused on economic development; benefiting anyone needing to learn about methodologies for implementing the strategy in this CEDS.		
Ideas for Implementation (How will it get done?)		
The CWEDD would partner with educational institutions and non-profits to develop and/or adapt existing curriculums on economic development. Training activities would then be tailored to meet the needs of jurisdictions of different sizes. A suggested model is the realization of an annual economic development academy. Such an activity would provide for further learning and idea sharing on best practices and innovative approaches to economic development. This could be coupled with a district-wide forum in which the CEDS strategy is revised and updated.		
Champion(s)/Responsible Parties:		CWEDD
Potential Partners		Potential Funding Sources
Universities, Ford Foundation, Business Oregon, Travel Oregon, Chambers of Commerce		Foundation grants, EDA
Timeframe		Estimated Costs:
☐ Short (<6 months) ☒ Medium (6-12 months) ☐ Long (>12 months)		☐ Low (<\$50K) ☒ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☐ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☐ Medium (50-150 hours) ☒ Long (>150 hours)	A customized curriculum with a number of training events realized.

GOAL 2: Advance economic activities that increase access to and provide a range of employment opportunities.

Action 2.1.1.1	Complete a regional marketing research report with recommendations for the CWEDD Board.	
Aligns with Goals:	1, 2, 3	
Rationale (Why is this important?)		
Marketing research goes beyond the traditional market analysis to cover a wider range of activities. A well-done marketing research will identify the District's potential for attracting businesses on key clusters. It will also give the CWEDD a unified language, which will support the prioritization of investments. The report should make specific recommendations to the CWEDD Board as to what approach to marketing is best suited for the District, given its characteristics and resources. <u>Observations:</u> Implementation is measured on actions 2.1.1.2, 2.1.2.1, and 1.2.1.2. It uses information generated on action 5.2.1.1		
Ideas for Implementation (How will it get done?)		
The CWEDD can partner with other organizations to fund the contract of a marketing agency by using own resources or applying to grants. It can also partner with marketing departments at local universities to develop parts of or the whole campaign via service learning projects.		
Champion(s)/Responsible Parties:	CWEDD	
Potential Partners	Potential Funding Sources	
Marketing programs at universities, Chambers of Commerce	Business Oregon, Oregon Economic Development Association, USDA Rural Business Development Grants	
Timeframe	Estimated Costs:	
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)	☐ Low (<\$50K) ☒ Medium (\$50-100K) ☐ High (>\$100K)	
Staff Time		Potential Measurements:
Ongoing ☐ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☒ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	Marketing research report completed.

Action 2.1.1.2	Capitalize on and align branding efforts in the region that align with the promotion of key industries outlined within the CEDS.	
Aligns with Goals:	1, 2, 3	
Rationale (Why is this important?)		
Once the marketing research is completed and provides more specific information on the District's competitive advantages, the next step is to convert this information into an asset. A branding strategy will give the District a visual identifier aimed at making it more visible and attractive to investors. A number of entities already market the District's assets to external audiences, such as local tourism agencies, the Willamette Valley Wineries Association, and educational institutions. The CWEDD should take advantage of these efforts and help to coordinate messaging among these entities to market to outside entities. <u>Observations:</u> Depends on action 2.1.1.1 being completed and is implemented by actions 2.1.2.1 and 1.2.1.2.		
Ideas for Implementation (How will it get done?)		
The CWEDD can partner with other organizations to fund the contract of a marketing agency by using its own resources or applying to grants. It can also partner with marketing departments at local universities to develop parts of or the whole campaign via service learning projects.		
Champion(s)/Responsible Parties:	CWEDD	
Potential Partners	Potential Funding Sources	
Marketing programs at universities, Chambers of Commerce, local tourism agencies, Willamette Valley Wineries Association, universities	Business Oregon. Oregon Economic Development Association, USDA Rural Business Development Grants	
Timeframe	Estimated Costs:	
☐ Short (<6 months) ☒ Medium (6-12 months) ☐ Long (>12 months)	☐ Low (<\$50K) ☐ Medium (\$50-100K) ☒ High (>\$100K)	
Staff Time	Potential Measurements:	
Ongoing ☐ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☒ Medium (50-150 hours) ☐ Long (>150 hours)	Branding strategy materials completed

Action 2.1.1.3		Establish a committee to review quality of place concepts and happiness index methodologies and make a recommendation to the CWEDD Board by summer 2017 on whether or not to craft a set of appropriate regional metrics.
Aligns with Goals:		1, 2, 3 4, 5, 6
Rationale (Why is this important?)		
The SWOT analysis has identified quality of place as an asset the District can use to attract new investment. The branding strategy from Action 2.1.1.2 will provide the tools to convert perception into operational actions regarding quality of place promotion. It will also establish the metrics by which the concepts will be evaluated. The committee proposed in this action would likely be a subset of economic development practitioners and will conduct periodic evaluations of District communities based on the established metrics. This information will provide jurisdictions the necessary guidance for future investments. <u>Observations:</u> This action would implement the measurements adopted in the branding strategy, but can be adjusted to work independent of it.		
Ideas for Implementation (How will it get done?)		
The evaluation can be conducted annually. LCOG and OCWCOG staff would support smaller jurisdictions during the data gathering process.		
Champion(s)/Responsible Parties:		CWEDD
Potential Partners		Potential Funding Sources
Chambers of commerce, non-profits and foundations focused on quality of life issues		CWEDD
Timeframe		Estimated Costs:
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)		☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☒ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☒ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	Number of evaluations conducted per year

Action 2.1.2.1	Coordinate the inclusion of regional branding language on local jurisdictions' and the State of Oregon's tourism promotion efforts. [High Priority Action]	
Aligns with Goals:	1, 2, 3, 5, 6	
Rationale (Why is this important?)		
Stakeholders identified tourism as an important factor in driving economic development within the District in the upcoming years. Tourism promotion is an established practice and is already regionalized per state criteria. The CWEDD will coordinate with state and local tourism promotion agents to align the language used in their materials with the branding strategy adopted in Action 2.1.1.2. The idea is to market the District not just as a place to visit, but also as a place to invest and live. <u>Observations:</u> This action would use language adopted in the branding strategy developed in Action 2.1.1.2, but can be adjusted to work independent of it.		
Ideas for Implementation (How will it get done?)		
The CWEDD would provide tourism agencies and local Destination Marketing Organizations (DMOs) with information resulting from marketing research and branding strategy. It would request the inclusion of such language in future printed materials, audiovisual campaigns, and online publicity.		
Champion(s)/Responsible Parties:	CWEDD	
Potential Partners	Potential Funding Sources	
Travel Oregon, Destination Marketing Organizations, local tourism agencies, and Chambers of Commerce	Travel Oregon, Destination Marketing Organization covering the region.	
Timeframe	Estimated Costs:	
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)	☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)	
Staff Time	Potential Measurements:	
Ongoing ☐ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☒ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	Number of tourism promotion initiatives that adopt new language

Action 2.2.1.1		Create and promote a database of incubators, accelerators, capital sources and support services available in the region by 2016. [High Priority Action]
Aligns with Goals:		1, 2, 3
Rationale (Why is this important?)		
Stakeholders identified several existing assets in the District that could be better used through an increase in visibility and creating connections to similar and complimentary assets. The CWEDD will gather data on current support services available to entrepreneurs and organize a section on the CWEDD's website to make the information available as well as links to each service provider. <u>Observations:</u> RAIN offers this kind of service, but it is not open to the general public. The database would live on the CWEDD's website and link people to existing resources as well as provide a brief description of any services provided.		
Ideas for Implementation (How will it get done?)		
The database can be compiled using data collected by LCOG and OCWCOG staff of the current and existing services offered in their jurisdictions. Information can also be gathered by visiting the agencies' websites or by requesting it directly. For efficiency, CWEDD would utilize existing informational resources (RAIN has a collection of resources related to innovation and entrepreneurship).		
Champion(s)/Responsible Parties:		CWEDD, RAIN
Potential Partners		Potential Funding Sources
COGs, RAIN, Chambers of Commerce, Institutions of higher education		CWEDD
Timeframe		Estimated Costs:
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)		☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☒ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☒ Medium (50-150 hours) ☐ Long (>150 hours)	

Action 2.2.1.2		Establish a network of local and regional navigators to help entrepreneurs through permitting and other processes by 2016.
Aligns with Goals:		2, 3
Rationale (Why is this important?)		
Stakeholders said that many entrepreneurs face difficulties when opening a new business, creating a barrier for economic development. To make this process easier for local entrepreneurs, each jurisdiction in the District would identify the relevant staff and stakeholders in their area which play a role in supporting the development of new businesses. In order to improve the services provided to new entrepreneurs in the region, the CWEDD and jurisdictions would adopt best practices in their business development processes and on the promotion of such processes online. The CWEDD's website would offer links to local websites, if available, or provide contact information for the local business development specialists.		
Ideas for Implementation (How will it get done?)		
CWEDD staff would compile the database identifying existing services within the District's jurisdictions. Information can also be gathered by visiting the agencies' websites or by requesting it directly.		
Champion(s)/Responsible Parties:		CWEDD
Potential Partners		Potential Funding Sources
Chambers of Commerce, Small Business Development Center at the three local Community Colleges		CWEDD
Timeframe		Estimated Costs:
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)		☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☒ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☒ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	Database completed and available on District's website

Action 2.2.1.3	Increase the availability of educational opportunities for businesses interested in international trade and on the advantages of exporting their goods and services.	
Aligns with Goals:	2, 3	
Rationale (Why is this important?)		
The relative small size of the District's market poses a limit to business expansion based on local consumption alone. Supporting businesses that are expanding their market reach is the best strategy to overcome this barrier. As the District focuses on innovative industries, the products of such industries will be attractive on a global scale. The CWEDD will need to be a catalyst, coordinating the offering of international trade training for local entrepreneurs.		
Ideas for Implementation (How will it get done?)		
The CWEDD can work on partnering with Business Oregon and the National Export Initiative to increase offerings on international trade training in the District.		
Champion(s)/Responsible Parties:		CWEDD
Potential Partners		Potential Funding Sources
Business Oregon, Ports, National Export Initiative, Chambers of commerce, Oregon Economic Development Association		Business Oregon, Ports, National Export Initiative. EDA
Timeframe		Estimated Costs:
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)		☐ Low (<\$50K) ☒ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☒ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☒ Medium (50-150 hours) ☐ Long (>150 hours)	Number of training activities realized in the region, number of people trained on foreign trade practices

Action 2.2.2.1	Working groups agree on two to three of the following business clusters to focus business development efforts on over the next five years: software/technology; food and beverage; education technology and research; advanced manufacturing; value-added forest products; university-related spinoffs; health; marine; agriculture; bioscience; and natural textiles. [High Priority Action]	
Aligns with Goals:	1, 2, 4, 5, 6	
Rationale (Why is this important?)		
During the planning process, clusters and sectors with growth potential were identified. These clusters and industries will produce most of the expected job growth in the upcoming years. These include industries that pay higher wages in comparison to traditional ones. Recruitment offices will need to align their recruiting practices with the strategy adopted in the current CEDS. A regional coordinated effort will leverage more support and infrastructure investment needed for the consolidation and expansion of promising clusters.		
Ideas for Implementation (How will it get done?)		
Once the CEDS is completed, recruitment officers for all jurisdictions would need to get very familiar with it. The CWEDD will need to coordinate with local jurisdictions on how this task will be accomplished.		
Champion(s)/Responsible Parties:	CWEDD	
Potential Partners	Potential Funding Sources	
Local recruitment officers, Chambers of Commerce	This action uses funding currently available on each jurisdiction.	
Timeframe	Estimated Costs:	
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)	☒ Low (< \$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)	
Staff Time	Potential Measurements:	
Ongoing ☒ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	Target recruitment activities performed, number of recruitment officers trained in the CEDS strategy, number of jurisdictions adopting the CEDS in their recruiting practices

Goal 3: Build on the region's entrepreneurial culture and assets through collaborative means.

Action 3.1.1.1		Organize a forum on regional innovation networking by the end of June 2016. [High Priority Action]
Aligns with Goals:		1, 2, 3
Rationale (Why is this important?)		
There are currently several innovation entities throughout the region, such as RAIN, Fertilab, NOAA, and the various higher education institutions in the District. However, stakeholders noted that a more concerted network, one with more communication, between these resources was a needed component of the CEDS. This action will be vital in connecting the District's innovation network to rural and coastal areas.		
Ideas for Implementation (How will it get done?)		
The CWEDD can partner with innovation organizations to plan a day for representatives of all of the innovation organizations to come together and present on their current work, upcoming work, and what resources or help they need currently or in the near future. This meeting can take place at either of the COG facilities, or at another site.		
Champion(s)/Responsible Parties:		CWEDD and RAIN
Potential Partners		Potential Funding Sources
RAIN, Fertilab, NOAA, University of Oregon, Oregon State University		Business Oregon, CWEDD
Timeframe		Estimated Costs:
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)		☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☐ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☒ Medium (50-150 hours) ☐ Long (>150 hours)	Forum event completed.

Action 3.1.2.1		Facilitate annual fall meetings with representatives from educational institutions to build connections between regional needs and academic course offerings.
Aligns with Goals:		1, 3, 5
Rationale (Why is this important?)		
Common feedback from stakeholders was the mismatch between educational preparedness for jobs, and job positions that need to be filled. In order to coordinate the needs of the job market with the developing workforce, the CWEDD can engage in more conversation with education institutions to begin to close this gap.		
Ideas for Implementation (How will it get done?)		
The CWEDD can contact the higher education institutes in the region, specifically the Research and Innovation offices, and arrange a group meeting between these representatives. The CWEDD can present what they perceive as the upcoming job clusters in the region, and can work with the educational representatives to determine the best methods for training students for these markets, such as through course offerings, internships, career center advising, or educational seminars. The CWEDD can encourage higher education institutes to work with local businesses to create workforce development programs pertaining to the current job clusters to target existing employees, encouraging job promotion from within.		
Champion(s)/Responsible Parties:		CWEDD
Potential Partners		Potential Funding Sources
Educational and vocational institutions, Workforce Investment Boards		Business Oregon, CWEDD, educational institutions
Timeframe		Estimated Costs:
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)		☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☒ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	Meeting completed, formation of new workforce development programs, increased enrollment in workforce development programs.

Action 3.1.2.2	The CWEDD will develop and implement a strategy for increasing business visibility, involvement, and entrepreneurial education into local schools by 2017. [High Priority Action]	
Aligns with Goals:	1, 3, 5	
Rationale (Why is this important?)		
Building an entrepreneurial culture can start at a young age. With a common educational trajectory of K-12 and then college, eventually entering the workforce, students may not be aware of entrepreneurialism as an alternative option after their educational career. By infusing these principles into early education, students can be better prepared for creating their own businesses. Additionally, potential residents will consider the quality of the District's educational system in their decision-making. By increasing the breadth of class content, and community interaction, the District's educational systems can increase in appeal.		
Ideas for Implementation (How will it get done?)		
With local educational institutions, the CWEDD can help create a pilot project for K-12 that will increase knowledge of and promote basic entrepreneurial principles. This pilot curriculum can be tailored to engage students at various ages, and can either be part of course material, or can be incorporated as a voluntary after-school or summer program.		
Champion(s)/Responsible Parties:	CWEDD	
Potential Partners		Potential Funding Sources
K-12 educational institutions, post-secondary educational institutions, Workforce Investment Boards		Business Oregon, CWEDD
Timeframe		Estimated Costs:
☐ Short (<6 months) ☒ Medium (6-12 months) ☐ Long (>12 months)		☐ Low (<\$50K) ☒ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☐ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☒ Medium (50-150 hours) ☐ Long (>150 hours)	Formation of entrepreneurial education strategy, increased enrollment in entrepreneurial business programs at the collegiate level.

Action 3.1.2.3		Prepare and promote an inventory of resources available to entrepreneurs by December 2016 through a combination of mixed media such as a website, listserv, or social media. [High Priority Action]		
Aligns with Goals:	1, 2, 3, 4			
Rationale (Why is this important?)				
There is currently no repository for the Cascades West region of what funding mechanisms or partnerships exist as they pertain to entrepreneurialism with respect to the educational or accelerator institutions. Since some such resources exist, the CWEDD can either contribute to or better promote inventories to streamline the information; so new entrepreneurs may have a better understanding of the economic climate for start-ups. Vehicles to promote these resources can be online through a website, a listserv, a set of social media pages, or through the annual forum on regional networking for innovation.				
Ideas for Implementation (How will it get done?)				
The CWEDD can research and detail the work and opportunities of the educational institutions and accelerators and compile this information into a website. The CWEDD can also link to and contribute to existing resources, such as the Oregon Startup Toolkit (http://www.oregon.gov/business/Pages/toolkit.aspx) or the Oregon Entrepreneur Ecosystem (http://oregonstartups.com/).				
Champion(s)/Responsible Parties:	CWEDD			
Potential Partners		Potential Funding Sources		
SBDC, current sites, such as: • http://www.oregon.gov/business/Pages/toolkit.aspx • http://www.sba.com/oregon/ • http://oregonstartups.com/ • http://sos.oregon.gov/business/Pages/starting-business.aspx		CWEDD		
Timeframe		Estimated Costs:		
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)		☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)		
Staff Time		Potential Measurements:		
Ongoing ☒ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☒ Medium (50-150 hours) ☐ Long (>150 hours)	CWEDD contributes their personal regional resource list to at least one existing inventory, and/or includes at least one link on their web site to such a resource.		

Goal 4: Identify and leverage internal and external funding sources to fund projects that increase the resilience (diversity and redundancy) of infrastructure systems throughout the district.

Action 4.1.1.1		Create a section in the CWEDD website to list current funding opportunities for local jurisdictions by December 2016. [High Priority Action]
Aligns with Goals:		1, 4, 6
Rationale (Why is this important?)		
A specific list of funding opportunities should include a list of Grant Opportunities as well as a list of Grant Applications that are currently under development, the departments (state and federal) that the grants live within, and the dates on which they are due. This transparency will allow for communities to proactively join in grants wherever advantageous, and facilitate the pooling of human resources and information wherever possible.		
Ideas for Implementation (How will it get done?)		
The CWEDD can partner with other organizations and agencies to proactively list grant funding opportunities on the CWEDD webpage, and make use of valuable intellectual resources and knowledge that would otherwise remain specific to any one given organization. This information could then be accessed and made use of by any organization within the District.		
Champion(s)/Responsible Parties:		CWEDD
Potential Partners		Potential Funding Sources
Economic Development offices from CWEDD, CWCOG, LCOG, and smaller local Economic Development agencies at the city and county level across the region.		Business Oregon. Oregon Economic Development Association, USDA Rural Business Development Grants, United States Economic Development Administration
Timeframe		Estimated Costs:
☐ Short (<6 months) ☒ Medium (6-12 months) ☐ Long (>12 months)		☐ Low (<\$50K) ☒ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☒ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	Development of a webpage specific to this information.

Action 4.1.2.1		CWEDD will work with OCWCOG and LCOG to complete a Regional Needs Assessment by summer of 2016. [High Priority Action]
Aligns with Goals:		1, 4
Rationale (Why is this important?)		
This list will serve to increase transparency and awareness of regional needs with the intent of better prioritizing those needs, and to best serve the region as a whole as projects with multiple benefits to multiple communities can be prioritized effectively. This assessment is integral to the Prioritization of projects undertaken in Action 6.1.3.1.		
Ideas for Implementation (How will it get done?)		
The CWEDD Board will facilitate the prioritization of projects and coordinate with local Economic Development agencies in order to pool resources efficiently.		
Champion(s)/Responsible Parties:		CWEDD
Potential Partners		Potential Funding Sources
Economic Development offices from CWEDD, CWCOG, LCOG, and smaller local Economic Development agencies at the city and county level across the region.		CWEDD
Timeframe		Estimated Costs:
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)		☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☐ Low (<0.2 FTE) ☒ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	Development of a webpage(s) specific to this information. The measure of success will lay in the web traffic that this resource either does or does not get. Measuring web traffic is a measure of utility and is easily tracked.

Action 4.1.2.2		CWEDD in cooperation with LCOG and OCWCOG will create a quarterly newsletter or email blast which informs on upcoming grant deadline dates, eligibility information, current and planned projects, and other funding opportunities.
Aligns with Goals:		1, 2, 3, 4, 5
Rationale (Why is this important?)		
Stakeholders reported difficulty in keeping up to date with funding opportunities year to year. Providing updates on upcoming grant opportunities to jurisdictions in the region would help communities that may not have the capacity to constantly search for opportunities, but are able to develop applications if there were appropriate grants. Updates about current and future projects would also help to inform jurisdictions about other activities in the area, providing opportunities to coordinate efforts where possible.		
Ideas for Implementation (How will it get done?)		
The CWEDD can partner with the COGs and other local economic development practitioners to gather information about funding opportunities in the area and to distribute regular updates about funding opportunities to the region's jurisdictions. This information could be distributed digitally and/or in print, and could be available on the CWEDD's and the COGs' respective websites.		
Champion(s)/Responsible Parties:		CWEDD
Potential Partners		Potential Funding Sources
Economic Development offices from CWEDD, CWCOG, LCOG, and smaller local Economic Development agencies at the city and county level across the region.		CWEDD, LCOG, CWCOG
Timeframe		Estimated Costs:
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)		☒ Low (<\$50K) ☒ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☒ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	Number of newsletters or e-mail blasts distributed; Number of members on the listserv

Action 4.2.1.1		CWEDD will publish and annually update an inventory of existing grant writing and proposal development resources at LCOG, OCWCOG, and other economic development agencies in the region.
Aligns with Goals:		1, 2, 3, 4, 5
Rationale (Why is this important?)		
Through the process of updating the CEDS, it was clear there was a lack of staff and resources available to assist smaller communities in economic development efforts. This has left smaller communities at a disadvantage, and weakens the District as a whole as opportunities are either not identified or acted upon. This action aims to help communities make effective and efficient use of limited resources available in the District. Resources could include a database repository that houses information on funded and non-funded grants and lists current and updated staff across the District. Increasing the amount of information available to communities can be accomplished through sharing information, staff expertise, and staff hours, as well as streamlining time-consuming processes and decreasing redundancies in the District.		
Ideas for Implementation (How will it get done?)		
The CWEDD can partner with other organizations to proactively compile a database, and make use of valuable intellectual resources and knowledge that would otherwise remain specific to any one given COG, jurisdiction, or economic development office. This information can then be accessed and made use of by any community in the District.		
Champion(s)/Responsible Parties:		CWEDD
Potential Partners		Potential Funding Sources
Economic Development offices from CWEDD, CWCOG, LCOG, and smaller local Economic Development agencies at the city and county level across the region.		CWEDD, LCOG, CWCOG, Individual Economic Development offices throughout the CWEDD.
Timeframe		Estimated Costs:
☐ Short (<6 months) ☒ Medium (6-12 months) ☐ Long (>12 months)		☐ Low (<\$50K) ☒ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☐ Low (<0.2 FTE) ☒ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	A Formal Mutual Assistance Agreement or similar agreement between Economic Development Agencies across the region at all levels.

Action 4.2.1.2		Create a database to share available resources with all regional communities containing a bank of past grant proposals and technical projects, and increase the number of staff hours available to smaller communities.
Aligns with Goals:		1, 2, 4
Rationale (Why is this important?)		
Much time and effort is invested in writing grant proposals. Regardless of whether the proposal itself is successful, the time and effort results in an accumulation of knowledge that can be recycled or repurposed without recreating the research that went into it originally. With basic fact checking and/or updating, this material can be incorporated into new proposals. Providing a bank of such knowledge preserves intellectual knowledge that is otherwise associated with a specific person. As employees move to other jobs or retire, this knowledge can be lost. With a repository of proposals sorted by type, organizations are also banking the hours put into the creation of these past grants. This may save many hours in the preparation of new grant proposals, making the process more efficient over time.		
Ideas for Implementation (How will it get done?)		
The implementation of this action will require at least two steps. The first being the gathering of past grant proposals and requisition of past grant proposals from other jurisdictions in either hard paper copy, or in electronic form. The second is dependent upon a choice to be made: To digitize hard copies on a wholesale level, or on an as needed basis. A third option would be to investigate whether the CWEDD could gain access to prior proposals and grant applications submitted to the regional Economic Development Administration to utilize as an additional resource. <u>Observation:</u> A decision will need to be made on who may access these records, a policy put into place to govern the distribution of this information, and record made of who information was distributed to in order to encourage it's responsible use. In many cases the information is not of a sensitive or secure nature, but is not necessarily appropriate for public consumption.		
Champion(s)/Responsible Parties:		CWEDD
Potential Partners		Potential Funding Sources
LCOG, CWCOG, EDD's from all jurisdictions that have them.		CWEDD, COG's, Oregon Economic Development Association
Timeframe		Estimated Costs:
☐ Short (<6 months) ☒ Medium (6-12 months) ☐ Long (>12 months)		☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☐ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☒ Medium (50-150 hours) ☐ Long (>150 hours)	The creation of a searchable electronic database, and a library of hard copy records.

Goal 5: Partner to connect workforce training, education, and entrance opportunities with workforce demand.

Action 5.1.1.1		Assess the workforce development system in the region and make recommendations to the CWEDD Board about the CWEDD's role in supporting coordination among workforce development organizations. [High Priority Action]
Aligns with Goals:		1, 2, 5
Rationale (Why is this important?)		
Evaluating the relationship between the Workforce Investment Boards (WIBs) and other workforce development organizations in the District and how well this system is working will help the CWEDD determine how best to prioritize the workforce development needs of the District. This can be leveraged to increase the quality and quantity of skilled labor in the District, making it more attractive for economic development.		
Ideas for Implementation (How will it get done?)		
The CWEDD will partner with WIBs and educational institutions in the District as well as the Regional Solutions Team to evaluate how well the District's workforce development system operates. The Workforce Development Working Group can take the lead for evaluating the District's workforce development system and offer recommendations to the CWEDD Board.		
Champion(s)/Responsible Parties:		CWEDD, Workforce Development Working Group
Potential Partners		Potential Funding Sources
Workforce Investment Boards, local educational institutions (secondary, vocational and higher ed.), and Regional Solutions Team		Business Oregon, Oregon Economic Development Association
Timeframe		Estimated Costs:
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)		☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☐ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☒ Medium (50-150 hours) ☐ Long (>150 hours)	Evaluation of workforce development system and recommendations for improving it.

Action 5.1.1.2		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. [High Priority Action]
Aligns with Goals:		2, 5
Rationale (Why is this important?)		
Apprenticeships, internships and on-the-job-training programs offer individuals alternative means for entering the workforce. Encouraging industries and local institutions to promote these programs helps diversify the local workforce, increase the resiliency of the region, and provides residents with a range of employment opportunities.		
Ideas for Implementation (How will it get done?)		
The CWEDD will work with institutions and businesses that manage existing training programs to define key elements of a successful program and identify growing industries that would benefit from apprenticeship, internship, and on-the-job-training programs.		
Champion(s)/Responsible Parties:		CWEDD
Potential Partners		Potential Funding Sources
Local vocational and secondary educational institutions, businesses in key industries for the region, Bureau of Labor and Industries, and WIBs		Bureau of Labor and Industries, US Dept. of Labor (American Apprenticeship Grant), COGs, Counties
Timeframe		Estimated Costs:
☐ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)		☐ Low (<\$50K) ☒ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☐ Low (<0.2 FTE) ☒ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	Enrollment for apprenticeship, internship, and on-the-job-training programs; number of businesses incorporating these programs into their hiring practices.

Action 5.2.1.1	CWEDD will identify growing industries paying living wages as well as strategies and best practices to attract and retain talented professionals.	
Aligns with Goals:	2, 3, 5	
Rationale (Why is this important?)		
The 'creative class' plays a key role in driving local economic activity, especially in the service industry and retail sectors. The District would benefit by identifying strategies and best practices that will attract and retain this talent. The Workforce Development Working Group should research how other communities are addressing this issue and identify successful practices and strategies.		
Ideas for Implementation (How will it get done?)		
Using cluster analysis from the CEDS, identify high-earning occupations in the region. Promote these industries on a district level through a coordinated marketing effort. Identify, research, and analyze successful strategies and practices from communities throughout the state and nation.		
Champion(s)/Responsible Parties:		CWEDD
Potential Partners		Potential Funding Sources
Business Oregon, Oregon Economic Development Association, Workforce Development Action Team		Economic Development Agency, Business Oregon, County governments, Local Industry Organizations, Chamber of Commerce
Timeframe		Estimated Costs:
☐ Short (<6 months) ☒ Medium (6-12 months) ☐ Long (>12 months)		☐ Low (<\$50K) ☒ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☐ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☒ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	Increase in employment in high-earning occupations for region. Increase in retention rates for individuals completing their education in the region. An overall growth in youth population for the region.

Action 5.2.2.1		CWEDD will identify and promote strategies and best practices for improving factors of livability such as, quantity and access to affordable housing, alternative transportation options, quality healthcare and education, access to open spaces, and arts and cultural events.
Aligns with Goals:		2, 3, 5
Rationale (Why is this important?)		
The needs of the District's workforce expand beyond educational and employment opportunities, they also include access to affordable housing, quality health care, as well as access to alternative transportation options, open spaces, and arts and cultural events. Identifying and promoting strategies and best practices that improve these factors for the District's workforce will help attract talented professionals to the region and increase the quality of the District's workforce.		
Ideas for Implementation (How will it get done?)		
Using existing data as well as data collected from other working groups, assess the needs for different factors related to livability in the District; a partial list is in the above action, with the Workforce Development Working Group providing a finalized list later. The Working Group will identify best practices for improving these factors and make recommendations to the CWEDD's Board.		
Champion(s)/Responsible Parties:		CWEDD and Counties
Potential Partners		Potential Funding Sources
Affordable housing agencies and organizations, Parks and Recreation agencies and organizations, Transportation agencies, Healthcare providers, Arts & Culture agencies and organizations		CWEDD
Timeframe		Estimated Costs:
☐ Short (<6 months) ☒ Medium (6-12 months) ☐ Long (>12 months)		☐ Low (<\$50K) ☒ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☐ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☒ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	Increase in quality and quantity of affordable housing stock; decrease in cost-burdened households; improved access to public transit; improved access to open spaces and arts and cultural activities.

Goal 6: Enhance visibility of community assets and accessibility of basic services in rural areas.

Action 6.1.1.1	In partnership with local Main Street programs, identify and support downtown revitalization projects in rural communities each year. [High Priority Action]
Aligns with Goals:	1, 2, 4, 6
Rationale (Why is this important?)	
Rural communities are seeking downtown revitalization strategies to foster greater place making and to create attractive communities that retain businesses and attract consumers. Downtown revitalization can take the form of building on the strength's of a community, bolstering eco-tourism, marine-related activities, or sustainable farming. Creating stronger downtowns will enable rural communities in the District to thrive as well as maintain a high quality of life.	
Ideas for Implementation (How will it get done?)	
Rural jurisdictions can assess their downtown projects and partner with the CWEDD to apply for EDA funding for implementation of these projects. The Rural Development Working Group can also collaborate for securing funding and additional resources as well as creating unique images of each community's downtown.	
Champion(s)/Responsible Parties:	CWEDD and Rural Development Working Group
Potential Partners	Potential Funding Sources
Rural community members of the CWEDD Board, EDA, RARE participants in the District, Destination Marketing Organizations (DMOs), Chambers of Commerce	EDA, USDA Rural Business Development Grants, Main Street Program
Timeframe	Estimated Costs:
☐ Short (<6 months) ☒ Medium (6-12 months) ☐ Long (>12 months)	☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time	
Ongoing ☐ Low (<0.2 FTE) ☒ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours) Creation of downtown revitalization plans, completed number of downtown revitalization plans, company/business mortality rate.

Action 6.1.1.2		Partner with Travel Oregon and other local tourism agencies to develop and market local value-add products.
Aligns with Goals:		1, 2, 5
Rationale (Why is this important?)		
Increasing tourism opportunities such as bike, winery, or sustainable agriculture tours in rural parts of the region will increase the tax base and shed light on the abundance of natural resources that rural areas offer as well as foster greater inclusivity between the urban and rural environments.		
Ideas for Implementation (How will it get done?)		
Rural jurisdictions can identify and meet with local Destinations Marketing Organizations (DMOs) to develop routes between urban and rural locations as well as identify points of interest along the route and destination. Rural representatives will also need to decide what locations in their area are the most attractive for such a tourist route, and how accessible these sites are.		
Champion(s)/Responsible Parties:		CWEDD and Rural Development Working Group
Potential Partners		Potential Funding Sources
Members of rural economic development working group, DMOs, Travel Oregon.		Oregon Economic Development Association, USDA Rural Business Development Grants
Timeframe		Estimated Costs:
☐ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)		☐ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☐ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	Improved connectivity, creation/number of local tours, indicators such as overnights in all types of accommodation, labor productivity in tourism services, and visitor satisfaction.

Action 6.1.2.1	The Rural Development Working Group will create a communication strategy to customize and promote rural innovation services from the regional innovation network in order to spur entrepreneurial growth in rural communities.	
Aligns with Goals:	3, 4, 6	
Rationale (Why is this important?)		
Entrepreneurialism tends to be concentrated in and around urban areas. Additionally, entrepreneurial efforts in rural communities require different resources and support services than those in urban environments. Efforts in rural environments are also more likely to rely on natural resources than elsewhere. In order to draw entrepreneurs into rural environments, entrepreneurialism and innovation services need to be tailored towards the assets of the rural communities involved.		
Ideas for Implementation (How will it get done?)		
The Rural Economic Development Working Group can connect with regional accelerators to identify entrepreneurial opportunities in the District and how to best leverage existing resources to foster entrepreneurialism. The Rural Economic Development Working Group can potentially contribute to websites such as: • http://www.sba.com/oregon/ • http://oregonstartups.com/		
Champion(s)/Responsible Parties:	CWEDD and Rural Development Working Group	
Potential Partners	Potential Funding Sources	
Rural Economic Development Working Group, RAIN, Fertilab, NOAA, SBDC's, retired community members with entrepreneurial experience.	USDA Rural Business Development Grants, Business Oregon	
Timeframe	Estimated Costs:	
☒ Short (<6 months) ☐ Medium (6-12 months) ☐ Long (>12 months)	☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)	
Staff Time	Potential Measurements:	
Ongoing ☐ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☒ Medium (50-150 hours) ☐ Long (>150 hours)	Entrepreneurial assets of the rural communities are available on the SBA or Oregon Startups website, or a working partnership is formed with RAIN or Fertilab.

Action 6.1.3.1	The Rural Development Working Group will use the results of the regional needs assessment (from Action 4.1.2.1) to identify, prioritize, and recommend a set of rural area “projects of regional significance” to the CWEDD Board. [High Priority Action]	
Aligns with Goals:	4, 6	
Rationale (Why is this important?)		
Rural communities reported a lack of access to resources that impact a community’s service capacity; resources such as planning, grant writing, GIS, or IT needs. Additionally, the private sector is facing succession issues in several key industries, such as agriculture, making access to these resources crucial. By using the regional needs assessment to prioritize needs and develop strategies to combat these issues, rural communities will be able to leverage resources that will strengthen their communities and ensure their longevity.		
Ideas for Implementation (How will it get done?)		
The Rural Economic Development Working Group can use the results of the regional needs assessment to determine the needs of rural communities. These responses can be compiled and prioritized to identify crucial gaps in services. The Working Group can then work with the CWEDD as well as local utility groups and businesses as needed to increase service accessibility in priority areas.		
Champion(s)/Responsible Parties:	CWEDD and Rural Development Working Group	
Potential Partners	Potential Funding Sources	
Rural Economic Development Working Group, CWEDD, utility companies	Oregon Economic Development Association, USDA Rural Business Development Grants	
Timeframe	Estimated Costs:	
☐ Short (<6 months) ☒ Medium (6-12 months) ☐ Long (>12 months)	☒ Low (<\$50K) ☐ Medium (\$50-100K) ☐ High (>\$100K)	
Staff Time	Potential Measurements:	
Ongoing ☐ Low (<0.2 FTE) ☐ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☐ Medium (50-150 hours) ☒ Long (>150 hours)	A needs assessment report

Action 6.1.3.2		The Rural Economic Development Working Group will partner with private sector businesses to ensure at-risk job sectors in specific communities are resilient to succession.
Aligns with Goals:		4, 6
Rationale (Why is this important?)		
Rural communities have reported a progressive loss of crucial services such as banks and grocery stores, often due to factors such as lack of continuity planning. This lack of planning makes businesses much more susceptible to influences like succession, as business owners are unable to find new ownership or management. A lack of these crucial services drastically impacts the longevity of communities, and continuity plans need to be in place to account for turnover in ownership.		
Ideas for Implementation (How will it get done?)		
The members of the Rural Economic Development Working Group can conduct an inventory of their respective communities regarding business services and ownership to develop a comprehensive understanding of potential business mortality. By creating dialogue around these issues, communities can mobilize funds and employers sustain declining businesses before they are out of business.		
Champion(s)/Responsible Parties:		Rural Development Working Group
Potential Partners		Potential Funding Sources
Rural Economic Development Working Group, CWEDD, private sector businesses		USDA Rural Business Development Grants
Timeframe		Estimated Costs:
☐ Short (<6 months) ☒ Medium (6-12 months) ☐ Long (>12 months)		☐ Low (<\$50K) ☒ Medium (\$50-100K) ☐ High (>\$100K)
Staff Time		Potential Measurements:
Ongoing ☐ Low (<0.2 FTE) ☒ Medium (0.2-0.4 FTE) ☐ Long (>0.4 FTE)	One-time ☐ Low (<50 hours) ☐ Medium (50-150 hours) ☐ Long (>150 hours)	Business mortality rate.

APPENDIX B: CEDS PROJECT LIST

This section will list potential projects that may qualify for funding from outside sources, including the EDA. The Board will update this section as regionally relevant economic development projects emerge over the next five years.

APPENDIX C: REGIONAL PROFILE

The purpose of this appendix 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.

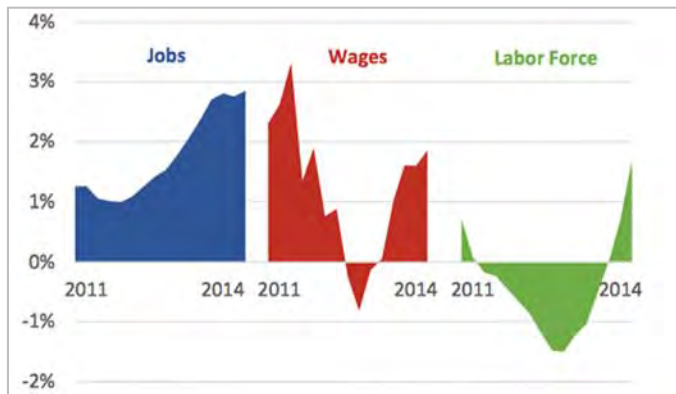
During the 1980s, many of the region's natural resource-based businesses faced significant structural changes and began contracting. While the entire region was impacted by this shift, many of the region's rural communities suffered severe hardships, as their relatively narrow natural resource-based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

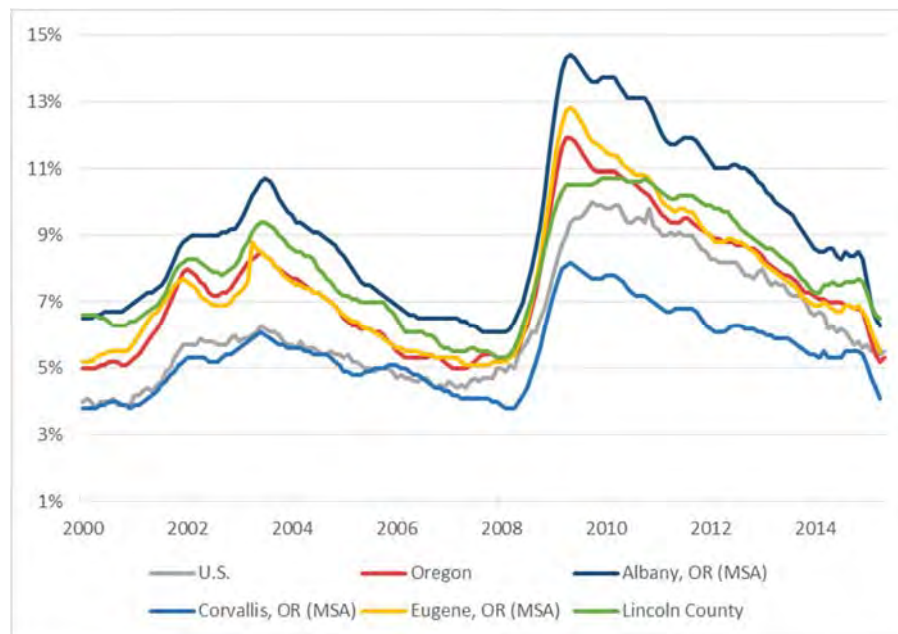
Lane County (Eugene MSA) unemployment data is typically closely tied with that of the State, with annual average unemployment rates of 6.6% and 6.4% respectively. March 2009 saw Lane County's rate climb to its highest level of the year at 13.5%.

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

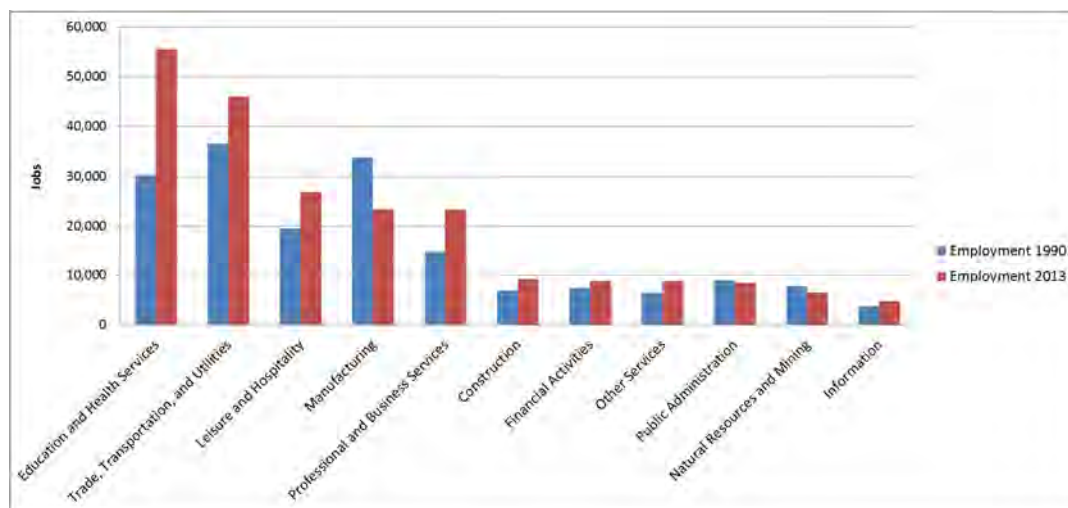
Shift-Share Analysis

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		Change	Expected Change
	1998	2012		
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		Change	Expected Change
	1998	2012		
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		Change	Expected Change
	1998	2012		
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		Change	Expected Change
	1998	2012		
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		Change	Expected Change
	1998	2012		
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

APPENDIX D: COMMUNITY RESOURCES

Appendix C 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.

APPENDIX E: NATURAL RESOURCES

Appendix D 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/>)

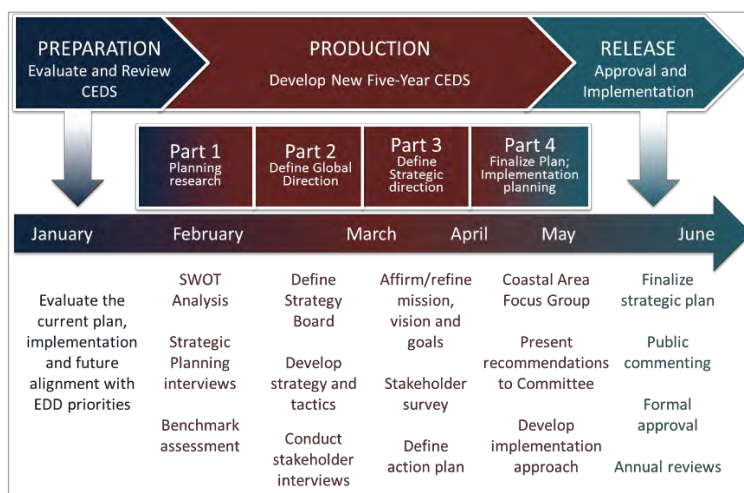
APPENDIX F: PLAN UPDATE PROCESS

The EDA requires economic development districts update their CEDS every five years pursuant to 13 C.F.R. § 303.7. This appendix describes the process Community Planning Workshop (CPW) used to facilitate the update of the 2015-2020 Comprehensive Economic Development Strategy (CEDS) for the Cascades West Economic Development District. The plan update process involved review of available economic data and plans, consultation with the CWEDD Board, and interviews, surveys, and focus groups with key stakeholders. The process included visioning, goal setting and action planning exercises. From this in-depth exploration of regional attitudes of economic development, the following set of guiding principles emerged, providing structure and focus for the planning team throughout the plan update process.

The CEDS update process began in January 2015 and continued until August 2015, shown in Figure E.1. The timeline is broken down into three key phases:

- **Preparation:** CPW evaluated the most current CEDS and assessed its strengths and weaknesses. This also included evaluations of other Districts' strategies and alignment of the current CEDS with other economic development planning documents in the region.
- **Production:** The longest of the three phases, this included the bulk of the CEDS update. This phase took place from February to June and included the environmental scan of the region, stakeholder engagement, meetings with the Board, and development of the CEDS action plan.
- **Release:** The final phase was the release of the CEDS. This was an opportunity to gather input from the public on the final draft of the CEDS. This phase includes final approval from the District Board and the regional EDA office before implementation of the strategy begins.

Figure E.1 2015-2020 CEDS Update Timeline



Source: Community Planning Workshop

District Board

The U.S. Economic Development Administration requires that the CEDS process be overseen by an economic development strategy committee. The Cascades West Economic Development District Board oversaw the 2015-2020 CEDS Update process. As outlined in the District's by-laws, the Board is made up of representatives from the Oregon Cascades West Council of Governments Economic Committee and the Lane Economic Committee, as well as other regional economic development representatives not outlined in the by-laws.

The Board played a key role in outlining the regional economic development vision and goals, and provided feedback about strategies, actions, and implementation of the CEDS. CPW facilitated four meetings with the District Board. Meeting agendas and minutes are included at the end of this appendix.

In addition to meetings with the District Board, the Lane Economic Committee discussed the CEDS update at several meetings throughout the process. The minutes from these meetings are also included at the end of this appendix.

Stakeholder Engagement

A key element of the CEDS update is gathering input from community members and stakeholders. The CPW team engaged stakeholders through three approaches, presented briefly below. More information about each of the approaches, including methodologies and summarized results, can be found in Appendixes G and H.

- Survey: To gain a better understanding of the region's broad economic development issues and opportunities, CPW distributed a survey to a broad range of external and internal stakeholders.
- Interviews: CPW conducted interviews with 10 stakeholders involved with regional economic development to better understand the region's economic development issues and opportunities. CPW worked with the District staff to identify key stakeholders in order to gain input from a variety of sectors and jurisdictions.
- Coastal Focus Group: CPW facilitated a specialized focus group specifically for representatives located in the region's coastal communities. This helped to provide insight into the coast's unique economic development issues and opportunities, and how a regional strategy can capitalize on and support their ongoing efforts.

Meeting I

- Agenda
- Minutes



Date: Thursday, February 19, 2015

Time: 9:30am – 11:30am

Location: Cascades West COG Office, 1400 Queen Ave. SE, Albany OR

Cascades West CEDS Planning Meeting #1 Agenda

- | | |
|--------------------------------------|--------|
| 1. Introductions (CPW/Staff) | 15 min |
| 2. Project Background (CPW) | 10 min |
| 3. Group Familiarity with CEDS (CPW) | 25 min |
| 4. SWOT Analysis (CPW) | 50 min |
| 5. Next Steps (CPW) | 20 min |



Meeting	Cascades West Economic Development District CEDS Kick-off Meeting Notes
Date	February 19, 2015, 9:30-11:30am
Location	Cascades West Council of Governments Offices: 1400 Queen Ave SE Ste. 205A, Albany, OR 97322
Attendees	See Attached List

INTRODUCTION

The goals for this initial stakeholder meeting was to convene the Cascades West Economic Development District (CWEDD) Stakeholders group; outline the Comprehensive Economic Development Strategy (CEDS) process to new stakeholders unfamiliar with the process; begin the process of determining Strengths, Weaknesses, Opportunities, and Threats (SWOT) for the Cascades West Region; and answer initial questions from stakeholders.

MAJOR THEMES

This meeting is the first in the process of updating the CEDS for the CWEDD. Oregon Cascades West Council of Governments (OCWCOG) has hired a Community Planning Workshop student team from the University of Oregon to conduct the update the CEDS document. The team as well as OCWCOG staff gave an overview CEDS update process and timeline, as well as the objectives for the CEDS. OCWCOG highlighted several of their key objectives for this CEDS update including:

- Identify items missed in the previous CEDS (e.g. Regional Accelerator and Innovation Network);
- Create a document that ties together housing, workforce, transport, local planning, and public/private sector;
- Build regional resiliency to mitigate effects of possible disasters; and
- Identify regional projects that could potentially be supported by EDA.

Familiarity with CEDS

This part of the meeting focused on assessing the group's familiarity with the CEDS and whether it has played a role in their own community and economic development planning. The following themes emerged from the large group discussion:

Use of the CEDS document

- Generally, stakeholders indicated they did not use the CEDS as it was not seen as relevant to their own planning processes.
- There is a need to make the CEDS a living document beyond 5 year updates.
- There is a need to shift from CEDS acting as a guideline to becoming a tool.
- How can we create ownership and engagement with the CEDS at a local level?

- CEDS content and projects need to be better disseminated in rural locations that do not have staff dedicated to facilitating economic development.
- Funding and investment may be the mechanism to incentivizing communities to become more engaged with the CEDS process.
- We need to identify the mechanisms for maintaining ongoing collaboration.

How to make a regionally-relevant document:

- Need to strategize how we engage both large and small of communities in the regional CEDS update process.
- Desire to attract projects that span region and do not negatively interfere with local efforts.
- How to make CEDS specific enough for individual communities to find useful without being competitive?
- How can we include more regional cooperation with businesses/research institutes like National Energy Technology Lab?
- Is there a regional strategy for easing the effects of restrictive Urban Growth Boundaries?

How to best engage with the community:

- Make sure the right people are at the table.
- Tourism stakeholders are important to include (Travel Lane County, Travel Oregon)
- Hold community meetings located in the different counties.
- Other federal groups that aren't here but should be include U.S. Forest Service and the Bureau of Land Management, especially related to tourism and recreation.
- Increase education institution involvement.
- Utilize existing mechanisms to reach out to rural areas (Ford Family Foundation network).
- Bring in more private sector stakeholders to the process

The stakeholder group then engaged in a SWOT (Strength, Weakness, Opportunity, Threat) analysis. The summary of this analysis can be found in the CEDS SWOT Analysis Memorandum.

NEXT STEPS

- The SWOT Analysis will be broadened to include more stakeholders through a survey process
- OCWCOG will work to convene the CWEDD Committee which will engage in the strategic planning process for the CEDS update

NEXT MEETING:

Date: Thursday, March 19, 2015, 9:30am – 11:30am

Location: OCWCOG offices Albany, Oregon

Topics: SWOT Analysis and Review; Determine Vision Statement/Goals.

ATTENDEES

Stakeholders

George A. Letchworth
Mike Adams
Bob Elliott
Kate Porsche
Pam Barlow-Lind
Brenda Bremmer
Amy Jauron
Brian Latta
Rachael Cotton

Anne Schuster
Bill Hall
Ali Bonakdar
Chris Workman
Clay Martin
Tom Nelson
Gary Marks
Jackie Michaelmas

OCWCOG Staff:

Brenda Mainord
Emma Chavez
Fred Abousleman

Lydia George
Tarah Campi
Theresa Conley

UO, Community Service Center Staff:

Amanda D'Souza
Blake Helm
Dianna Skelly
Fabio Andrade

Josh Bruce
Kelsey Zlevor
Robert Parker
Sarah Allison

Meeting 2

- Agenda
- Minutes



Date: 03/19/2015

Time: 9:30am – 11:30am

Location: Cascades West COG Office, 1400 Queen Ave. SE, Albany OR

Cascades West CEDS Strategic Planning Meeting #2 Agenda

- | | |
|---|--------|
| 1. Introductions and Project Update (CPW/Staff) | 15 min |
| 2. Preliminary SWOT Results (CPW) | 10 min |
| 3. Visioning Exercise (CPW) | 15 min |
| 4. Goals Review and Discussion (CPW) | 70 min |
| 5. Next Steps (CPW) | 10 min |



Meeting	Cascades West Economic Development District CEDS 2015-2020 Update - Meeting #2
Date	March 19, 2015, 9:30-11:30am
Location	Cascades West Council of Governments Offices 1400 Queen Ave SE Ste 205A, Albany, OR 97322
Attendees	CWEDD Board (See Attached List)

INTRODUCTION

The goals for the March 19th Cascades West Economic Development District (CWEDD) Comprehensive Economic Development Strategy (CEDS) Update meeting were to produce an updated Vision for the CEDS, and review and update the 2010 CEDS Goals. The meeting was facilitated by a University of Oregon Community Planning Workshop (CPW) student team. This was the second of four CWEDD CEDS update meetings.

VISIONING UPDATE

The CPW team first led the Board through a visioning exercise and discussion of the regional economic development vision. The goal of this process was to determine the relevancy of the vision included in the 2010 CEDS, and whether there was a need for changes or additions. The visioning exercise had participants list story headlines they would like to see written about the region in 2020. These results were then compared to the 2010 CEDS vision (full results are attached at the end). Overall, the vision was preserved, though the Board noted the need for two additions:

- Increased emphasis on coordination among economic development efforts throughout the region; and
- Increased emphasis on not only diversifying the economy but also growing existing industries.

GOALS UPDATE

The CPW team then facilitated a discussion of the 2010 CEDS goals, to again determine relevance and whether there was a need for any changes or additions. Each goal was discussed individually. The following highlights the key points of discussion for each goal:

- **Goal 1- Advance economic activities that provide a range of employment opportunities.** There is a need for better coordination among workforce investment boards; to create more workforce skill development opportunities and increase access to those educational opportunities; there is a need for a clearer distinction between workforce skill and opportunities to advance economics; better match skill development with what businesses need; proactive language that leverages new opportunities; need

to establish more effective communication with existing business's needs (beyond that of providing services) in order to facilitate growth.

- **Goal 2- Build on the region's entrepreneurial culture and assets.**

In general participants agreed with this goal's continuing relevance in the region. Further discussed is the need to make resources more accessible to rural communities, the need for better telecom infrastructure, and the need to foster increased proactive measures on the part of CWEDD. CWEDD needs to identify how to not only take advantage of the Regional Accelerator Innovation Network (RAIN) as a regional asset to but also increase its effective reach outside the main metropolitan areas.

- **Goal 3- Partner to improve workforce training and education.**

Discussion primarily focused on the significant need for trained healthcare workers, and a more robust funnel for the education or retraining of individuals (i.e. CNA nursing positions and others). Attendees also discussed the need to connect workforce demand with workforce training, need for secession training (away from natural resource sectors), and the need to attract and retain talent over the long term.

- **Goal 4: Provide technical assistance to communities and support capacity building efforts**

- **Goal 5: Support infrastructure assistance to communities**

The CPW team recommended the combination of goals 4 and 5 due to the role of infrastructure in supporting capacity building efforts. Board members supported this proposal. Without the needed infrastructure in place, certain industries are not as likely to choose to locate in the region. The Board discussed how funding is available for infrastructure, but communities may not have the capacity to invest the cost of time and effort to apply for it. Attendees proposed CWEDD could provide technical assistance in planning (development of applications) – a currently identified need in rural and smaller communities. This presents the opportunity for multi-objective projects via networking/communication and other means at the disposal of the 2 COG's and CWEDD. For example, Infrastructure improvements can be accomplished simultaneously with seismic upgrades – two different potential sources of funding. In terms of economic resilience, the region needs to focus on being proactive by incorporating redundancies in infrastructure. Other comments included the need to incorporate power and rail within this goal.

- **Goal 6: Support the needs of rural areas.**

Attendees discussed the unique needs of rural areas, particularly those related to healthcare services and the issues with having an aging population. The Board determined there exists a lack of staff to fill out applications (i.e municipal project managers); and an aging agricultural community needing younger participants as older farmers retire. Also discussed was a "rewording" of this goal. Suggested was "Improve Competitiveness of Rural Areas", to reflect the changing reality that sees rural areas refocusing on tourism instead of more traditional agricultural endeavors.

Regional Collaboration

The Board also discussed the inclusion of a regional collaboration goal. There was general consensus that there is a need for collaboration but more information is needed about what that structure should look like within the CEDS. The CPW team will bring back more information and examples at the next meeting.

OTHER DISCUSSION ITEMS

The Board discussed a couple of other items throughout the meeting:

- Should Economic Resilience be incorporated as a standalone Goal, or throughout the document? As a goal, progress indicators can be developed and can focus on values and sustainability in a deliberate concise manner. Discussion was had on the state of the State versus the Region, the question asked was, what are other [economic resilience] measurements we need to be looking at?
- CPW proposed the possible use of subregions to account for different needs in different areas of the region. In general, the Board felt splitting into subregions went against the goal of collaboration and coordination, and that a true regional plan would balance the needs of each area. If there were to be subregions, it should not be by political line, but via physical characteristics.

NEXT STEPS

- CPW team will update the vision and goals based on the meeting's discussions
- CPW team will bring examples of regional collaboration structure

NEXT MEETING:

Date: Thursday, April 16, 2015, 9:30am – 11:30am

Location: OCWCOG offices Albany, Oregon

Topics: Goal and Objectives Finalization



VISIONING EXERCISE RESULTS

Cascades West Economic Development District Comprehensive Economic Development Strategy Visioning Exercise					
Diversified Economy	Lifelong Educational Opportunities	Sustainable Natural Resources	Integrated Infrastructure	Coordinated Efforts	Combination Concepts
A vibrant regional economy based on outstanding local human and natural resources	OSU and U of O institute transportation values	Sustainability Central	Infrastructure \$'s Local and Regional	Great coordination between OSU and U of O leads to 20 new start-ups per year for RAIN	<u>The</u> place to learn, grow, work, and play
We are a HUB for Ocean Observing in the Pacific Northwest	Steps to train the chronic unemployed	A sustainable path for resource industries	Railroad Improvements bring big business from Albany to the Coast	Regional Festivals to replace local festivals	Oregon's Mecca
South Willamette Valley leads the state in trades sector job creation	Where learning thrives	We draw an international tourist base due to natural beauty	Ocean power powers Oregon	Coordination of festivals prevents competition increasing attendance	
Increase the economic base with living wages and higher paying jobs	Marine Studies Initiative based in Lincoln County puts Oregon on the map for marine research and training	We supply a gourmet seafood market	Eugene Airport becomes a regional airport with buy-in from Lane, Linn, Benton, and Lincoln Counties		
Woods Hole of the West	A skilled workforce	Climate changes result in increased population	High Speed Rail slated to open Portland		

		within mid-Willamette and Coast	to Eugene Route		
Port of Newport's International Terminal ramps up agricultural exports to global markets	We have become famous for the BLUE economy of Marine Technology		Highway 20 construction completed after long delays. Businesses and commuters rejoice		
The Net Zero Capital	Newport is newest OSU 4 year Campus		We have a fiber network that serves everyone		
	South Willamette Valley has lowest Unemployment in Oregon				
The region will encourage diversification of industries in the region and increase economic resilience.	The region will capitalize on Marine Technology industries, educational, and research assets to attract and retain new businesses and residents.	The region will sustainably allocate resources for public consumption and will capitalize on tourism opportunities.	The transportation sector will continue to increase connectivity and capitalize on opportunities to expand.	Regional partners will coordinate on local activities which bring visitors to the region, and capitalize on programs such as RAIN.	



ATTENDEES:

CWEDD Board Members

Pam Barlow-Lind
Biff Traber
Bill Hall
Sharon Konopa
Rob Scoggin

Tom Nelson
Ann Schuster
Rachel Cotton
Caroline Bauman

OCWCOG Staff:

Charlie Mitchell

Emma Chavez

UO, Community Service Center Staff:

Amanda D'Souza
Blake Helm
Dianna Skelly
Fabio Andrade

Josh Bruce
Kelsey Zlevor
Robert Parker

Meeting 3

- Agenda
- Minutes



Date: 04/16/2015

Time: 9:30am – 11:30am

Location: Cascades West COG Office, 1400 Queen Ave. SE, Albany OR

Cascades West CEDS Strategic Planning Meeting #3 Agenda

- | | |
|--|---------------|
| 1. Introduction | 10 min |
| 2. Interview and Survey Presentation | 20 min |
| 3. Finalization of Goals and Objectives | 80 min |
| 4. Next Steps | 10 min |

Meeting	Cascades West Economic Development District CEDS 2015-2020 Update - Meeting #3
Date	April 16, 2015, 9:30-11:30am
Location	Cascades West Council of Governments Offices 1400 Queen Ave SE Ste 205A, Albany, OR 97322
Attendees	CWEDD Board (See Attached List)

INTRODUCTION

The goals for the April 16th Cascades West Economic Development District (CWEDD) Comprehensive Economic Development Strategy (CEDS) Update meeting were to present the preliminary findings of the survey and interview, discuss visions for regional collaboration, and to review the proposed 2015 CEDS goals and objectives. The meeting was facilitated by a University of Oregon Community Planning Workshop (CPW) student team. This was the third of four CWEDD CEDS update meetings.

SURVEY AND INTERVIEW UPDATE

The CPW team presented a preliminary summary of findings on the survey and interviews. The main findings were that less than ½ of respondents were aware of the CEDS, there is a disconnect between jurisdictions and a regional economic development strategy, and there needs to be a greater focus on economic resilience. The Board authorized a move forward to keep reaching out to contacts for interviews, and board members volunteered to help bridge connections with these contacts.

REGIONAL COLLABORATION

The CPW team then outlined Goal 6, its objective, and presented examples of how the North Oklahoma CEDS and North Central Florida CEDS approached regional collaboration goals. North Oklahoma utilized regional action teams that would decide their strategies for accomplishing the goals. North Central Florida developed an economic development academy open to stakeholders. Each academy has its own focus and the goal is to teach community members about economic development concepts and regional planning. The Board saw value in both ideas, and directed the CPW team to incorporate both approaches into the CEDS. The Board approved the objectives as:

- Implement a regional asset based S.M.A.R.T. Comprehensive Economic Development Strategy, which expands public, private and non-profit collaboration with a common strategic vision.
- Develop a collaborative regional economic development ecosystem that enables every local community, economic, workforce development and planning practitioner to be as successful as possible.

OBJECTIVES UPDATE

The CPW team facilitated a World Café activity of the proposed 2015 CEDS goal objectives to determine whether there was a need for any changes or additions. Each goal and list of objectives

was written on a flipchart, on four different flipcharts in each corner of the room. Groups of the Board rotated through each flipchart in ten-minute increments, and provided feedback on the objectives to a member of the CPW team. The finalized goals and objectives obtained from the feedback are as follows:

- **Goal 1- Advance economic activities that provide a range of employment opportunities.**
 - **Objective:** Broadcast a message regionally, nationally, and internationally, that the Cascades West region is a desirable place for businesses to locate and grow by highlighting our strengths in workforce, education, leisure, and healthcare.
 - **Objective:** Improve business environment to encourage retention, expansion, attraction, and resilience of businesses that provide living wage jobs.
- **Goal 2- Build on the region's entrepreneurial culture and assets.**
 - **Objective:** Develop and strengthen existing network of business accelerators to facilitate information sharing, encourage partnerships and improve coordination of efforts in the region.
- **Goal 3- Partner to improve workforce training and education.**
 - **Objective:** Increase regional visibility and use of CWEDD and COG's to amplify regional knowledge of funding information and resources available over the next five years.
 - **Objective:** Increase capacity on grant writing and technical project development.
- **Goal 4: Provide technical assistance to communities and support capacity building efforts**
 - **Objective:** Increase the size and quality of the workforce by connecting and aligning education and workforce development programs to develop the region's current and future talent supply chain and meet employer needs.
 - **Objective:** Retain and attract younger talent through engagement linkages, lifestyle amenities, and meaningful career opportunities.

Rural Communities

The Board also discussed the objectives for rural communities for Goal 5. There was general consensus that there is a need for integration of the rural and urban economies, and ensuring rural communities are not void of access to basic services. The Board approved the objective as:

- Promotion and expansion of eco-tourism, marine-related activities, sustainable farming, local vineyards and food production by adopting regional approach to rural economic development.

NEXT STEPS

- CPW team will craft an action plan based on the meeting's decisions on objectives

NEXT MEETING:

Date: Thursday, May 21, 2015, 9:00am – 12:00pm

Location: OCWCOG offices Albany, Oregon

Topics: Action Plan Finalization, Implementation



ATTENDEES:

CWEDD Board Members

Pam Barlow-Lind
Bill Hall
Sharon Konopa
Rob Scoggin
Biff Traber
John Pascone
Tom Nelson

Bob Elliott
Chris Workman
Dennie Houle
Ann Schuster
Rachel Cotton
Caroline Bauman

OCWCOG Staff:

Charlie Mitchell

Emma Chavez

UO, Community Service Center Staff:

Amanda D'Souza
Blake Helm
Dianna Skelly
Fabio Andrade

Josh Bruce
Kelsey Zlevor
Robert Parker

Meeting 4

- Agenda
- Minutes

Date: 05/21/2015

Time: 9:00am – 12:00pm (180 mins)

Location: Cascades West COG Office, 1400 Queen Ave. SE, Albany OR

Cascades West CEDS Strategic Planning Meeting #4 Agenda

- | | |
|--|----------------|
| 1. Project Update (CPW/Staff) | 5 min |
| 2. Action Items Presentation and Prioritization (CPW) | 125 min |
| <i>Includes 5 minute break at 9:30</i> | |
| 3. Implementation Discussion (CPW) | 40 mins |
| 4. Next Steps (CPW) | 10 min |



Meeting	Cascades West Economic Development District CEDS 2015-2020 Update - Meeting #4
Date	Thursday, May 21, 2015, 9:00am-12:00pm
Location	Cascades West Council of Governments Offices 1400 Queen Ave SE Ste 205A, Albany, OR 97322
Attendees	CWEDD Board (See Attached List)

INTRODUCTION

The goals for the May 21st Cascades West Economic Development District (CWEDD) Comprehensive Economic Development Strategy (CEDS) Update meeting were to present proposed actions for the updated strategy, prioritize actions, and discuss implementation including the proposed restructuring of the CWEDD. The University of Oregon Community Planning Workshop (CPW) student team facilitated the meeting. This was the fourth and final CEDS update meeting.

ACTION UPDATE

The CPW team presented the proposed coordinating actions for the CEDS goals and objectives. The Board was provided a comprehensive list of proposed actions. This section summarizes the CWEDD Board's proposed changes to the actions and strategies.

Goal 1- Advance economic activities that provide a range of employment opportunities.

- **Action 1.1.1.2:** Capitalize on and align branding efforts in the region that align with the promotion of key industries outlined within the CEDS.
 - *Suggested change:* Pick and add specific projects for reference (ex: scenic by-way).
- **Action 1.2.1.3:** Increase the availability of educational opportunities to regional businesses interested in international trade on the advantages of exporting their goods and services.
 - *Suggested change:* Include "exporting international trade" to suggest local fulfillment. Also include reference to using local supply chains.

Goal 3- Partner to improve workforce training and education.

- **Action 3.2.1.1:** CWEDD will publish and maintain an inventory of existing grant writing and proposal development resources at LCOG, OCWCOG, and other economic development agencies in the region.
 - *Suggested change:* Include a monthly newsletter or e-mail with information on upcoming grants and eligibility; the inventory list can provide content for the newsletters.

Goal 4: Provide technical assistance to communities and support capacity building efforts

- **Action 4.1.1.2:** 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.
 - *Suggested change:* Incorporate “diversify” along with increasing participation.
- **Action 4.2.1.1:** CWEDD will identify growing industries paying living wages as well as strategies and best practices to attract and retain young talent.
 - *Suggested change:* Board was uncomfortable using “young” talent, and instead propose including livability (housing, transportation, arts and culture) in order to also address issues concerning succession and the aging population.

Goal 5- Enhance visibility of community assets and accessibility of basic services in rural areas

- **Strategy 5.1.3** - Meet the economic needs of rural communities by diversifying and distributing basic services -such as energy, transportation, food, water, communication, etc. – across the region.
 - *Suggested change:* The Board expressed concern that the strategy still did not really align with the goal based on the use of “basic services.” While telecommunications were voiced as an additional need, the suggestion was to change “basic” to “needed” services. Additionally, “address” was suggested to replace “meet” needs.
- **Action 5.1.1.1:** By the end of 2015, establish a working group on rural economic development.
 - *Suggested change:* Farmers and succession should be considered, and should include farming and fishing agencies (ex: 10 Rivers Farm Agency).
- **Action 5.1.2.1:** The rural economic development working group will create a communication strategy to customize and promote rural innovation services from the regional innovation network in order to spur entrepreneurial growth in rural communities.
 - *Suggested change:* Include plans to leverage the retiree population – these are people with experience and capital moving to the area.

Goal 6 - Foster and encourage partnership needed for regional collaboration.

- *Suggested change:* Rearranging order to make this the first goal of the CEDS.
- **Action 6.2.1.1:** Create and convene at least annually specific committees to be responsible for implementation and monitoring of each goal/priority area identified in this CEDS.
 - *Suggested change:* include language to make the needs assessment occur more regularly, such as making the regular assessment as a part of the CEDS update process.

PRIORITIZATION

The CPW team led the Board through an exercise to prioritize actions, laying them out on a calendar to illustrate when each action would occur over the next 5 years. The Board agreed to begin most research and analysis in year 2, though reiterated research should try to align with the COGs' existing research agendas, and discussed the importance of cultivating buy-in from elected officials immediately. The Board discussed the importance of having a kick-off meeting, possibly using the planned "State of the Region" event at the beginning of the year, or potentially including the innovation forum in this event. The working groups would develop their own tasks from years 2-5 based on their relevant actions.

IMPLEMENTATION

The CPW team then facilitated a discussion of the proposed implementation plan, which included a restructuring of the District. The CPW team suggested the CWEDD Board needed to increase their meeting times to 4 times per year, and should establish four working groups to implement actions: the Regional Education and Practitioners Working Group, the Entrepreneurship and Innovation Working Group, the Workforce Development Working Group, and the Rural Development Working Group. CPW proposed potential working group members and timelines, and received the following feedback from the Board:

- **CWEDD Board**
 - Suggested change: Other key players to include in the working groups are members of the regional solutions team, as well as members of the chambers of commerce.
- **Regional Education and Practitioners Working Group**
 - Suggested change: Expand the focus to be broader and include retraining services.
- **Entrepreneurship and Innovation Working Group**
 - Suggested change: Include private sector representation (SBDCs), and include K-12 representatives.
- **Rural Development Working Group**
 - Suggested change: Include representatives from Rural Development Initiatives, members from farm groups (OSU extension, farm bureau), and/or Ten Rivers Food Web

NEXT STEPS

- CPW team will incorporate the aforementioned feedback into a finalized action and implementation plan to incorporate into the final draft of the document.
- The final document draft will be released for a 30 day public comment period. CPW will work with Cascades West and Lane Councils of Government to distribute the document and gather feedback. The document will then be sent to EDA for review and will be brought back to the CWEDD Board for approval before implementation.

ATTENDEES:

CWEDD Board Members

Pam Barlow-Lind
Bill Hall
Sharon Konopa
Rob Scoggin
Biff Traber
John Pascone
Tom Nelson

Chris Workman
Ann Schuster
Rachel Cotton
Steve Dignam
Mary Parker
Dennis Aloia

OCWCOG Staff:

Charlie Mitchell

Emma Chavez

UO, Community Service Center Staff:

Amanda D'Souza
Blake Helm
Dianna Skelly
Fabio Andrade

Josh Bruce
Kelsey Zlevor
Robert Parker

APPENDIX G: SWOT ANALYSIS

Appendix F summarizes the Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis for the Cascades West Economic Development District (CWEDD). A SWOT analysis considers the internal factors (strengths and weaknesses) that influence economic development initiatives, as well as external factors (opportunities and threats) that may also impact these initiatives. In order to successfully facilitate economic development in the region, a Comprehensive Economic Development Strategy (CEDS) should consider how it can leverage its strengths and opportunities to address the weaknesses and threats that may hinder economic development efforts.

This SWOT analysis pertains specifically to economic development in the four-county region of Benton, Lane, Lincoln, and Linn Counties. The following section summarize the methodology used to develop the analysis for the CWEDD. The remaining sections present the findings of the analysis, which helped to frame and guide the formation of the CWEDD's goals, objectives, strategies, and actions in the CEDS.

Methods

At the CEDS Committee's initial meeting CPW Staff conducted an exercise with regional stakeholders designed to identify the Cascade West region's strengths, weaknesses, opportunities and weaknesses. A SWOT analysis helps identify the critical internal and external factors that speak to the region's unique assets and competitive positioning. In addition to the CEDS Committee meetings, it was important to gain input from the community as a whole on issues to be addressed in the CEDS. As the process started, interviews were conducted with key regional stakeholders. These individuals were identified, as well as a list of survey recipients, through input from the CEDS Committee as well as CWCOG and CWEDD staff. For more details about survey, interview, and focus group results and methodology, turn to Appendices G and H.

The SWOT analysis was used as a baseline to begin discussion about the Region's goals, objectives, strategies, and potential for economic growth. The analyses were also cross-referenced with the established CEDS goals and objectives to ensure the CEDS process accomplished what community and business members thought was important regarding the Region's strengths, weaknesses, opportunities, and threats.

Strengths

Multiple research institutions and accelerators throughout the region, as well as several higher education institutions, give the Cascade West region a framework for a strong entrepreneurial culture. As a growing region in innovation, organizations like RAIN help keep business retention and expansion a priority for the region. Oregon's economic culture and natural resources make it an attractive

place to live. Stakeholders indicated that the growing medical supplies, maritime industry, and research clusters as well as the size and magnitude of the agriculture and food industries, are strengths for the region.

Table B-1 SWOT Analysis Results: Strengths

Initial CEDS Committee Meeting Results	Online Survey Results	Interview Results
• N-S connectivity I-5 • Port of Toledo expansion • Rail network • Expanded Hwy 20 • Culture of innovation (RAIN) • Developing clusters (health products, software & technology) • Natural resources (tourism and industry) • Low costs of development • Higher ed. (2 universities and 3 community colleges) • Workforce training centers (maritime) • Research Institutes • CWEDD • OCWCOG and LCOG • Economic Development nonprofits • Chambers of commerce	• Regional Accelerators (RAIN) • Educational opportunities • Growing medical supplies and research clusters • Agriculture and Food Industries • Quality and capacity of road networks • Freight transport infrastructure • Alternative transportation options (bicycle, pedestrian) • Economic development supported politically and by community • Public land regulation of natural resources • Support for startup and innovation industries (RAIN) • Small business support (Cascade West Financial Services)	• RAIN • COG's financial resources for a broad base of projects • Higher Education & Research Institutions • Adaptive and attractive building code processes • Interstate 5 (connectivity to broader markets)

Weaknesses

Given the region's broad range of economies, and environments, such as coastal or urban, there exists a lack of regional agreement on how to navigate and pursue economic development in a unified and equitable way. Despite the region's access to educational resources, there is still a perception that the availability of skilled labor in the region is a weakness.

Table B-2 SWOT Analysis Results: Weaknesses

Initial CEDS Committee Meeting Results	Online Survey Results	Interview Results
• E-W connectivity • Coastal rail connectivity • Limited airport service	• Job availability (family-wage or otherwise) • Business environment	• Government regulation • Lack of connections to existing resources

• Aging infrastructure • Small population (relative) • Lack of support services for startups (financing) • Lack of branding for the region • Aging population and increasing number of retirees • Declining basic education • Lack of retraining services • Weak processes and collaboration among stakeholders	• Affordable housing (lack of supply, high demand) • Skilled labor force of region • Diversity of employment opportunities • Availability of public transportation • Access to infrastructure financing • Availability and convenience of commercial airlines • Local land use permitting process • Access to capital for individuals	• Skilled labor force (not enough trained workers) • Technical assistance to communities • Travel and access to international airports • Regional collaboration and partnerships • Public & private sector partnerships
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Opportunities

The overall perception is that the region is filled with unrealized potential in terms of coordination and collaboration, promotion of livability of the area, employment opportunities, maritime trade and research, and educational and research assets.

Table B-3 SWOT Analysis Results: Opportunities

Initial CEDS Committee Meeting Results	Online Survey Results	Interview Results
• Maritime transportation US-Asia • Potential to serve WA-CA markets • Growing national and Intl. economies • Influx of retirees • Expanding market for medical marijuana products • In-migration to OR • OSU expansion (Newport) • Demand for maritime related training • Funding for regional development • CEDS update (chance for strengthened regional network)	• Proximity to CA and WA markets • Growing maritime trade between US and Asia • Increasing demand for renewable energy • Aging Baby boomer generation • Increased life expectancy • Tourism appeal of natural resources • 'Green business' sector • Increased enrollment in higher education • Access to capital	• Workforce education • Enterprise Overlay Zones (increase use across region) • Quality of life (good place to raise a family) • 'Lay-down' areas for transportation modality transfers • Value-added forest product businesses

Threats

In light of the recent recession, it became clear that some parts of the region were able to recover faster than others. Based on natural resource allocation, availability of services, and varying sizes in tax base, not all counties were able to achieve a swift and effective recovery.

Table B-4 SWOT Analysis Results: Threats

Initial CEDS Committee Meeting Results	Online Survey Results	Interview Results
- Decreasing gas tax revenue - Natural hazards - Natural hazards - Uncertainty in state's tax structure - Decline in natural resources - Downturn in national and intl. economies - Competition from other metro areas - High housing costs (relative) - Low wages (relative) - Duplication of efforts (due to lack of collaboration) - Lost opportunities (due to lack of collaboration) Unnecessary competition among government bodies	- Potential changes in climate - High housing costs Shift from manufacturing and resource based economy to service industry based economy	Lack of affordable housing and aging housing stock

APPENDIX H: STAKEHOLDER SURVEY

In April and May of 2015, Community Planning Workshop (CPW) administered an on-line survey to a wide variety of economic development stakeholders in Cascades West Economic Development District (CWEDD). CPW designed the survey to gauge perceptions of the strengths, weaknesses, opportunities, and threats in the region. In addition, respondents used the survey to provide feedback on proposed updates to the goals and objectives for the CEDS.

Appendix G summarizes the methods used and presents key findings and general results from the survey. The survey represents one component of a comprehensive stakeholder engagement process. Refer to Appendixes B, F and H for additional stakeholder engagement information.

The remainder of this Appendix presents the survey methodology, key findings, implications, and summary results.

Methods

CPW developed, reviewed, tested, administered and analyzed the survey. The purpose of the survey was to evaluate the perceptions and values of stakeholders in the region. CPW developed the survey questions based on concepts put forth by the EDA for Comprehensive Economic Development Strategies. CPW also developed economic resilience questions based on EDA requirements and suggestions. Questions were proofread for grammar, punctuation, and clarity, and administered using Qualtrics, an on-line survey software vendor.

The planning team partnered with Cascades West Council of Governments, Lane Council of Governments, and regional Chambers of Commerce to distribute the survey. The initial distribution was sent to over 1,500 individuals. Respondents were also encouraged to forward the survey to interested stakeholders. The survey was distributed to members of both the public and private sector in the region.

CPW administered the survey via the internet using the on-line survey vendor Qualtrics. Respondents could access the survey using a web browser for a three week period between March 30 and April 17 2015. The survey included an introductory email with background project information as well as the goal of the CEDS Update Survey. CPW designed the survey to take 30-minutes or less to complete. All respondents had the opportunity to answer every question and all questions were optional. Respondents were given the opportunity to provide general comments at its conclusion.

The survey received 153 total views, with 144 respondents answering at least two questions. Ninety-one respondents completed the entire survey. At least 15 representatives from each of the four counties responded to the survey.

Key Findings

- **Stakeholders value economic development but are unaware of the CEDS.** Ninety-five percent of respondents reported regional economic development planning was important or very important to the economic vitality of the region. General comments at the end of the survey supported this assertion, but emphasized the need to streamline the strategy.
- **Most stakeholders perceive a disconnect between their jurisdiction and a regional strategy.** Many respondents to an open ended question reported that there is a lack of communication and coordination between agencies in the region. Over 50-percent of respondents disagreed with the statement, "Benton, Lane, Lincoln and Line counties currently function as a regional economy."
- **Respondents acknowledge the need for economic resilience.** Sixty-nine percent of respondents indicated that they disagreed that the region as it currently stands can recover or withstand a shock. Seventy-nine percent of respondents reported it is important for the CEDS document to consider business impacts resulting from chronic stresses, and 89-percent reported it is important to also consider business impacts resulting from catastrophic events.

Implications

These survey results provide insight into the beliefs and values of the region's stakeholders as they pertain to economic development and resilience. Based on the survey results, factors for the CWEDD Board to consider during the CEDS update process include:

- **Updated goals and strategies will need to have a stronger impact on fostering collaboration and cooperation between counties and the region.** The overarching commentary on the survey was the need to cater to multiple counties and geographic locations with varying needs. In discussion of potential strategies, the CWEDD should consider how to increase education and conversation around specific county needs.
- **Focus on increasing the general utility of the CEDS.** While many respondents support economic development and see its value in the region, less than half of respondents were aware of the CEDS document. The CWEDD should consider how to best disperse the document more broadly, and how to engage in increased and regular discussion about the CEDS.
- **There is an opportunity to incorporate an economic resilience component to the updated CEDS.** A majority of stakeholders perceive a lack of resiliency in the region in the wake of a chronic stress, or natural disaster. This suggests that adding an economic resilience component to the CEDS may begin to address a new and increasing concern in the region.

Survey Findings

The following subsections summarize the results for each of the question categories contained in the survey.

General Economic Development Planning

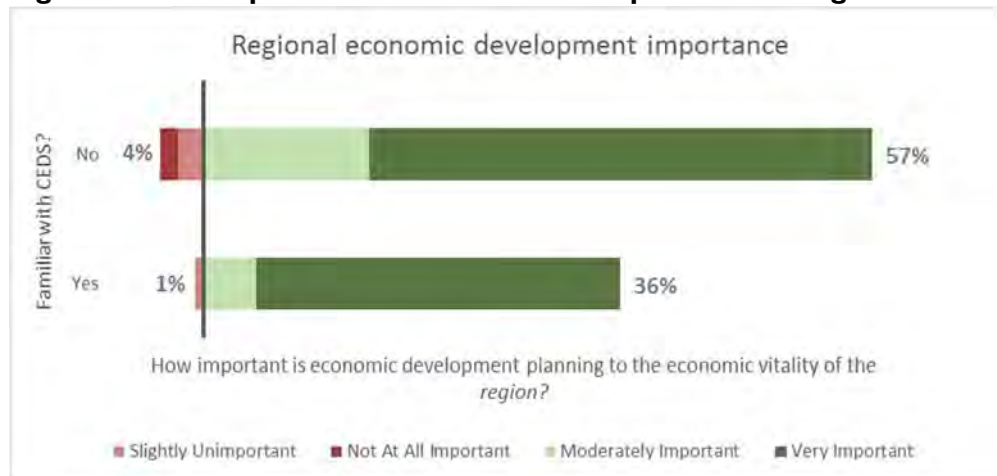
The first set of questions asked respondents some general questions about economic development planning in the CWEDD. The survey directed respondents to consider the entire four county region of Linn, Lincoln, Benton, and Lane when answering the questions.

Figure 1 shows that the vast majority of respondents reported regional economic development planning was important or very important to the economic vitality of the region. Notably, only 42-percent of all respondents were aware of the CWEDD Comprehensive Economic Development Strategy.

Of the 42-percent of respondents that were familiar with the CEDS document, only 24-percent reported using the document in their economic development or business activities. Sixteen out of 20 respondents indicated that the CEDS was at most, slightly useful.

This data in sum suggests that stakeholders in the region value economic development strategizing and planning. However, there is a clear disconnect between this interest and familiarity with the existing regional planning strategy.

Figure 1: How Important is Economic Development Planning?



Source: 2015 CWEDD Stakeholder Survey

Table 1: Respondents' Awareness of the CEDS Document (86 Respondents)

Answer	Response	%
Yes	36	42%
No	47	55%
Don't Know	3	3%
Total	86	100%

Source: 2015 CWEDD Stakeholder Survey

Regional Obstacles

Respondents were asked to name the two biggest obstacles they perceive in the region that inhibit regional economic development. The top three common categories for responses are as follows:

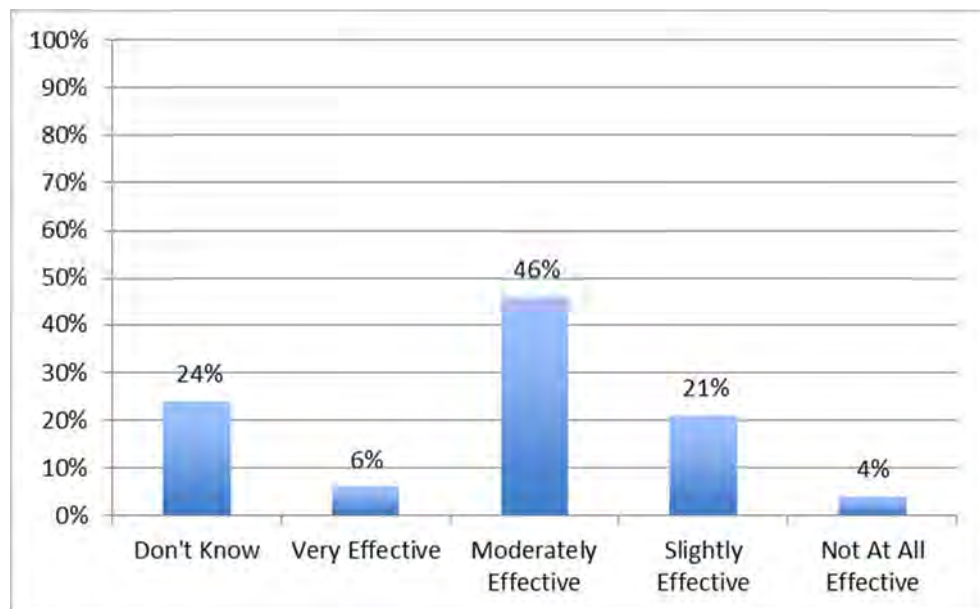
Network Communication: Many respondents believe there is a lack of communication and coordination between agencies in the region. This lack of communication and coordination prevents stakeholders from seeing how a “regional strategy can make a positive impact on their specific area.” There is also a “perceived lack of safe forums” for open dialogue on these issues.

Funding Resources and Access to Capital: Not only is there little access to funding resources, but according to respondents, there is little to no agreement on how to fund goals and projects.

Lack of Consensus: Many respondents reported that the region lacks a consensus or strategy for economic development. Many respondents say their communities still view themselves as individual entities in competition with each other.

While respondents reported that regional collaboration was lacking based on this feedback, of the efforts that have occurred, Figure 2 shows that 46-percent of respondents reported that they were at least moderately effective in achieving regional economic development. This data suggests that the lack of regional effort may not be due to stakeholders not seeing the utility in regional efforts, but a result of poor coordination and collaboration from organizations.

Figure 2: Effectiveness of Regional Efforts at Achieving Economic Development Objectives (85 Respondents)

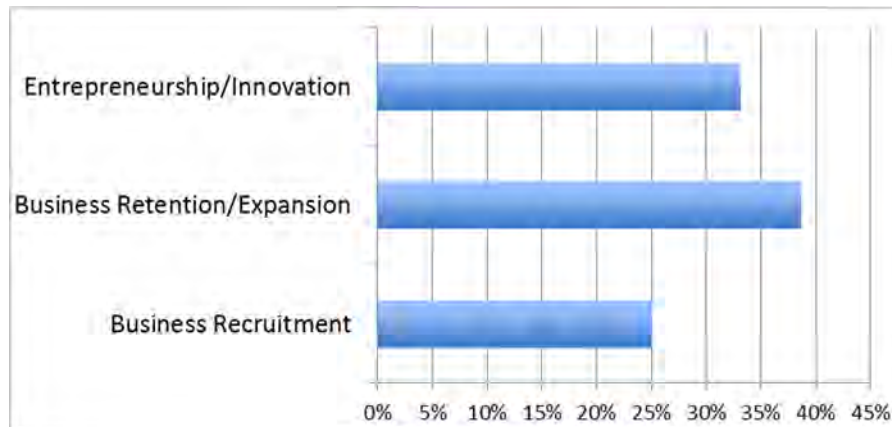


Source: 2015 CWEDD Stakeholder Survey

Additionally, respondents were asked to determine how the region should prioritize economic development efforts based on an acknowledgement of the

aforementioned obstacles. The survey asked respondents to indicate the percentage of attention that should be given to three listed economic development strategies: (1) business recruitment, (2) business retention/expansion, and (3) entrepreneurship/innovation. Overall, respondents indicated that retention and expansion efforts should receive the most attention in the regional strategy. Business recruitment was emphasized the least, as seen in Figure 6.

Figure 3: Economic Development Strategy Prioritization (85 Respondents)



Source: 2015 CWEDD Stakeholder Survey

SWOT Results

Respondents were asked to rank the degree to which they perceive given topics in the following categories as strengths or weaknesses, and opportunities or threats as they pertain to regional economic development. Summaries of these responses per category are as follows.

Strengths and Weaknesses

Employment Land Base: Respondents were split about employment land base in the region. Some respondents viewed the availability of buildable commercial sites, and the capacity of those sites as almost equally weakness and strength. Geographic differences (rural versus urban) may influence these sites differently, which could account for the split responses.

Community Characteristics: An overwhelming amount of respondents listed availability of any job, family-wage or otherwise, as a weakness. While respondents feel that the presence of accelerators and educational opportunities are a strength, respondents reported that businesses still feel that having a supportive business environment is a weakness.

Respondents also listed affordable housing, skilled labor, and diversity of employment opportunities as weaknesses. Although access to educational resources is seen as a strength, there is still a perception that the availability of skilled labor in the region is a weakness, meaning even the skilled labor that exists may not provide a broad enough range of opportunities. A majority of respondents

indicated that the growing medical supplies and research clusters, and the size and magnitude of the agriculture and food industries, are strengths.

Infrastructure: Most respondents reported that the quality and capacity of road networks was a strength, along with infrastructure for freight transportation. However, respondents indicated that the availability of public transportation was a general weakness in the region, but alternative transportation options (e.g. bicycle, pedestrian) were a strength. The major weaknesses of the region were access to infrastructure financing, and the availability and convenience of commercial airline services.

Regulatory Framework: A majority of respondents believe that economic development is supported politically and by the community. While respondents reported that public land regulation of natural resources is a strength, the local land use permitting process was indicated as a weakness. This suggests that the process, not the regulation, is the larger weakness of the overall regulatory framework.

Access to Capital: Access to capital for individuals is seen as a weakness, but respondents were split as to whether access to capital for businesses was a strength or a weakness. Respondents overwhelmingly indicated that support for startup and innovation industries (RAIN) and small business support through Cascades West Financial Services were strengths of the region.

Opportunities and Threats

Infrastructure: Respondents saw the region's proximity to California and Washington markets, as well as the growing maritime trade between the U.S. and Asia as strong opportunities. The region's increasing demand for renewable energy is a clear opportunity. Survey respondents see potential changes in the environment as a threat to the region.

Community Characteristics: Survey respondents were optimistic about the region's characteristics. An aging baby boomer generation, an increased life expectancy, tourism appeal of natural resources, the growth of the 'green business' sector, and the increased enrollment in higher education were all seen as clear opportunities for the region. High-housing costs and the shift from manufacturing and natural resource-based economy to a service industry-based economy were both seen as threats to the region.

Access to Capital: Overall respondents saw access to capital as an opportunity for the region. Responses indicated mixed perceptions about whether access or the ability to use natural resources for economic development were an opportunity or threat in the region.

Regulatory Framework: Responses to regulatory framework questions varied. A number of respondents felt that state and federal land use regulations and processes are threats to the region. However, an equal number saw state and federal practices as neither a threat nor opportunity. Despite the region's perception of land use regulations and process, respondents view collaboration between state and regional land use agencies as an opportunity for the region.

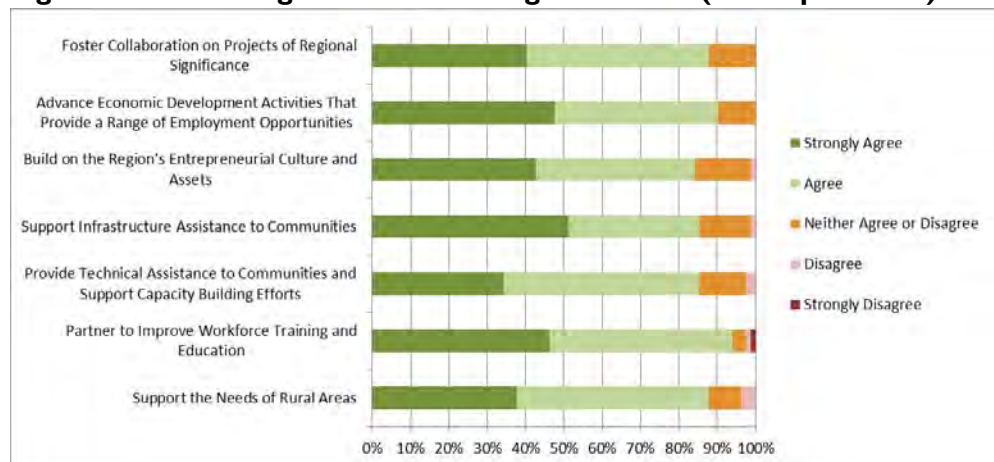
Regional Goals for Economic Development

Respondents were asked to indicate their agreement with potential regional goals for economic development. The goals provided were:

- Support the Needs of Rural Areas
- Partner to Improve Workforce Training and Education
- Provide Technical Assistance to Communities and Support Capacity Building Efforts
- Support Infrastructure Assistance to Communities
- Build on the Region’s Entrepreneurial Culture and Assets
- Advance Economic Development Activities that Provide a Range of Employment Opportunities
- Foster Collaboration on Projects of Regional Significance

Figure 4 presents respondents’ feedback for these goals. While respondents varied on whether they generally agreed or strongly agreed, there was very little disagreement about the proposed goals. The two goals that illustrated the most agreement were “Support Infrastructure Assistance to Communities” and “Advance Economic Development Activities That Provide a Range of Employment Opportunities.”

Figure 4: Level of Agreement with Regional Goals (85 Respondents)



Source: 2015 CWEDD Stakeholder Survey

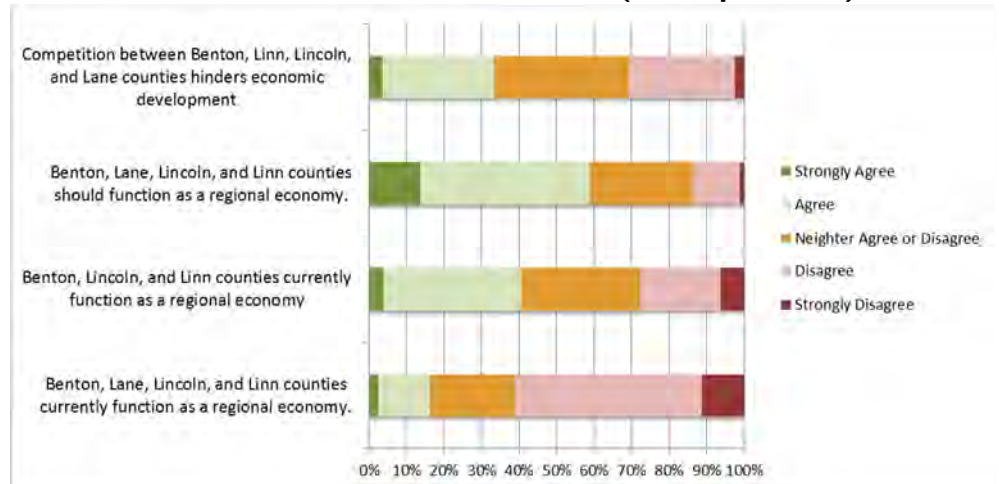
Respondents were also asked to provide their level agreement with four different scenarios concerning the relationships between Benton, Lincoln, Linn, and Lane Counties. The four scenarios follow:

1. Benton, Lane, Lincoln, and Linn counties currently function as a regional economy.
2. Benton, Lincoln, and Linn counties currently function as a regional economy.
3. Benton, Lane, Lincoln, and Linn counties should function as a regional economy.

4. Competition between Benton, Linn, Lincoln, and Lane counties hinders economic development.

Figure 5 summarizes respondent feedback. Responses suggest that respondents agree Benton, Lincoln, and Linn counties currently function and should function as a regional economy. However, when Lane County is added to the list, respondents *disagree* with notion that the four counties function as a region. Respondents are split on whether competition between counties helps or hinders economic development.

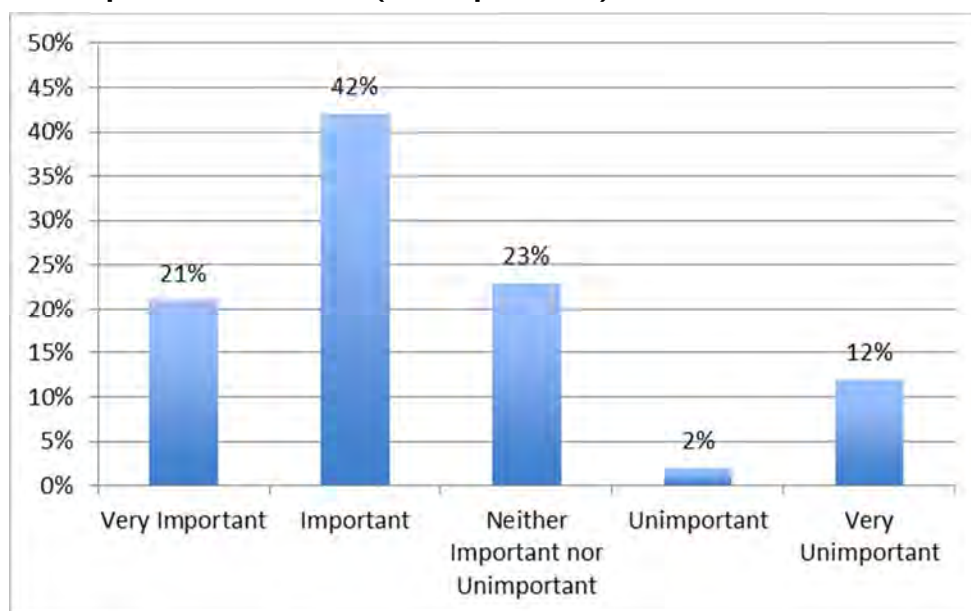
Figure 5: Level of Agreement of Responders with Relationship Scenarios of Benton, Lincoln, Linn, and Lane Counties (85 Respondents)



Source: 2015 CWEDD Stakeholder Survey

In order to address concerns about urban versus rural environments, respondents were asked their opinion on the importance of potentially establishing a rural economic development committee. As illustrated in Figure 6, over 60% of respondents asserted that this would be an important, if not very important, initiative.

Figure 6: Degree of Importance of Establishing a Rural Economic Development Committee (84 Respondents)



Source: 2015 CWEDD Stakeholder Survey

Economic Resilience

Respondents were asked to provide their input on several questions related to economic resilience in the region.

Sixty-nine percent of respondents indicated that they disagreed or strongly disagreed that the region as it currently stands can recover or withstand a shock. Similarly, 76-percent of respondents reported it is slightly important, if not very important, for the CEDS document to consider business impacts resulting from chronic stresses. Eighty-seven percent reported it is at least slightly, if not very important, for the CEDS to also consider business impacts resulting from catastrophic events.

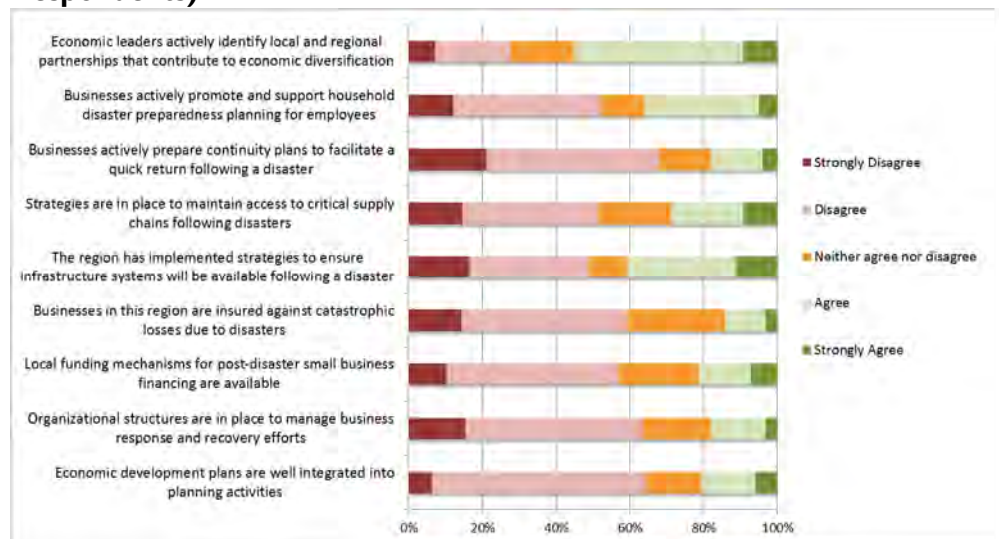
Respondents were also asked to consider a list of characteristics present in economically resilient communities, and the degree to which they agreed these characteristics were present in the region. These characteristics are as follows:

- Economic development plans are well integrated into other local, regional, and state planning activities (e.g. land use, hazard mitigation, transportation).
- Organizational structures are in place to manage business sector response and recovery efforts in the region after a disaster event (e.g. a standing economic recovery task force)
- Local funding or grant-making mechanisms for post-disaster small business financing and financial program management are available
- Businesses in this region are adequately insured against catastrophic losses due to disaster events

- The region has implemented strategies to ensure critical infrastructure systems used by businesses in the region will be available following a disaster (e.g. transportation, fuel, energy, water, etc.)
- Strategies are in place to maintain access to critical supply chains following disasters
- Businesses in this region actively prepare business continuity plans to facilitate a quick return to business following a disaster
- Businesses in this region actively promote and support household disaster preparedness planning for their employees
- Economic leaders in the region actively identify local and regional partnerships that contribute to economic diversification

A summary of agreement levels with each scenario is presented in Figure 7. It is important to note that not every scenario received the same amount of responses: Scenario 2 received the most responses out of any other scenario, with the majority expressing their disagreement with businesses in the region promoting household disaster preparedness planning for their employees. The most disagreement was expressed with the last scenario, that economic development plans are well integrated in state and local planning activities. Respondents agreed predominantly that economic leaders are identifying local and regional partnerships that contribute to economic diversification.

Figure 7: Agreement with Resilience Scenarios in the Region (85 Respondents)



Source: 2015 CWEDD Stakeholder Survey

Additional Respondent Comments

At the end of the survey, respondents had the opportunity to leave feedback for the committee, and the following general themes emerged:

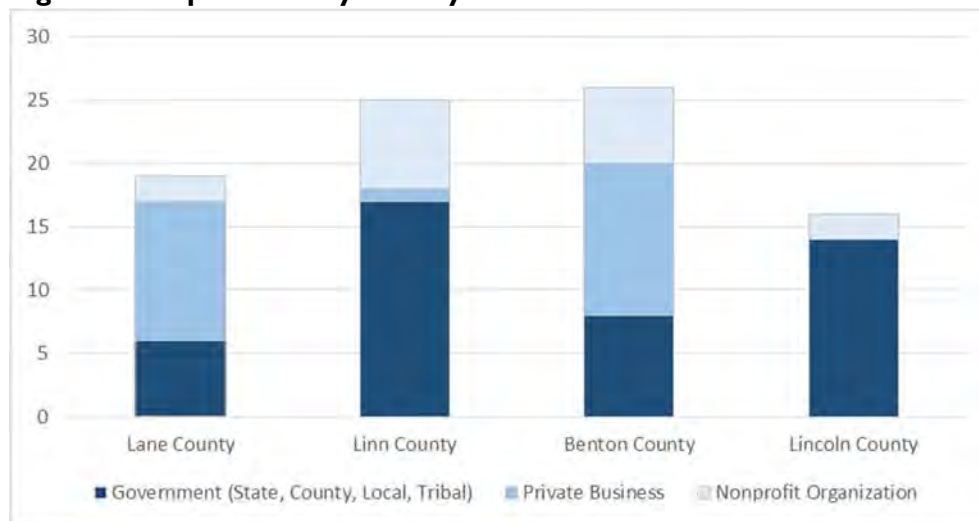
- General comments about recognizing different needs of urban versus rural areas, as well as different counties.

- Respondents highlighted the need for focusing the goals on concepts that all counties could support regardless of geopolitical boundaries.
- The need and emphasis on business retention and expansion to become and maintain a status as a competitive region.
- A commonly cited concern was the degradation of natural resources.

Respondent Characteristics

The survey asked several questions about respondents' location, and the constituency they represent. Notably, not all respondents to the early sections of the survey completed the respondent characteristics section. Figure 8 shows the number of respondents by county and sector based on 86 responses to the question. Benton County had the most respondents with 26 (31-percent), followed closely by Linn County with 25 (30%), Lane County with 18 (21-percent), and Lincoln County with 15 (19-percent). Across the four counties, fifty-three-percent of respondents (45) reported that they represent the government sector, 27-percent represent private businesses (23), and 20-percent represent non-profit organizations 17. Lane and Benton County had higher numbers of private sector respondents, while Linn and Lincoln County had higher numbers of government sector respondents.

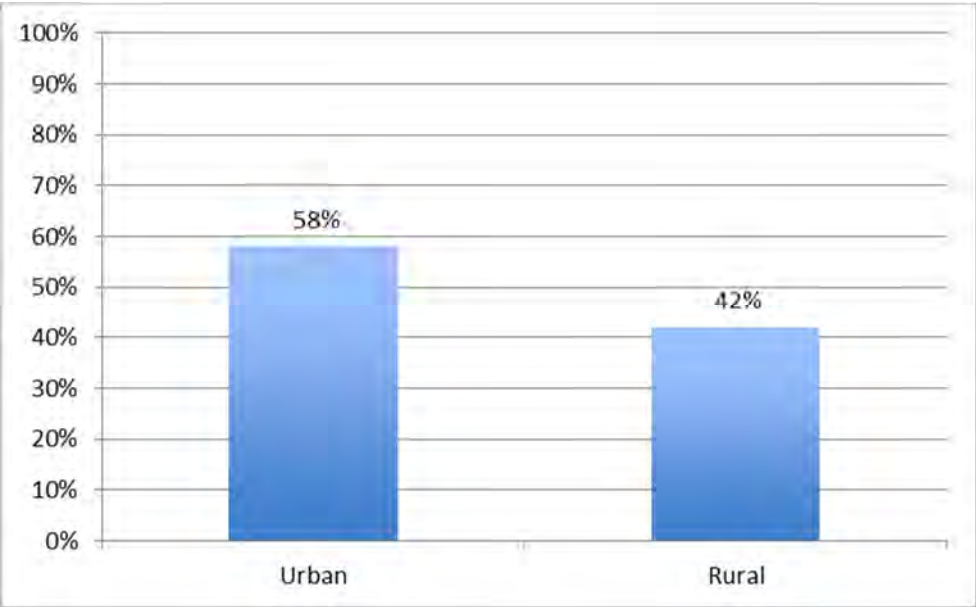
Figure 8: Respondents by County and Sector



Source: 2015 CWEDD Stakeholder Survey

The survey also asked respondents to self-identify whether the area they represented was urban or rural. Figure 9, shows responses were almost halfway split, with urban having slightly more representation. Given that definitions of urban and rural environments were not provided, these responses are open to interpretation.

Figure 9: Respondents' Community Type Representation (85 Respondents)



APPENDIX I: INTERVIEW AND FOCUS GROUP RESULTS

Appendix H summarizes the results from two key pieces of stakeholder engagement in the update of the Comprehensive Economic Development Strategy (CEDS). In order to gather input from a wide range of sectors, Community Planning Workshop (CPW) conducted ten phone interviews and facilitated a coastal focus group to discuss regional economic development strategies.

The interviews and focus group were designed to gather information about how to make the CEDS a more relevant document, as well as gauge perceptions of the region's strengths, weaknesses, opportunities, and threats related to economic development. The remainder of this Appendix presents methodology, key findings, implications, and a detailed summary of interview and focus group results.

Methods

Interviews

The interviews were not intended to be statistically representative. CPW worked with the Cascades West Council of Governments (CWCOG) and the CWEDD Board to identify potential interviewees. Interviewees were strategically chosen to ensure there was varied representation by each of the four counties and sector (public, private business, innovation/entrepreneur, rural, education). In general, coastal representation was not considered within this range of stakeholders due to the focus group discussed in the following section.

In total, the CPW team conducted interviews with ten stakeholders. Interviews took place between April 10-29, 2015, and lasted 30-45 minutes each. CPW utilized a set list of open-ended questions for each interview, and focused on gaining perspectives on: CEDS relevance; rural economic development issues; regional collaboration; economic development priorities; strategies to support the retention, expansion, and attraction of businesses; and economic resilience of the region.

Focus Group

The coastal focus group took place on April 29, 2015, at the Newport Public Library in Newport, Oregon. Ten stakeholders from communities in Lincoln County and coastal Lane County attended the focus group and represented a range of sectors including local and county government, educational institutions, private businesses, research, and tourism agencies. CPW utilized the interview questions to guide the group discussion.

Key Findings

- **The region is in need of more collaboration and coordination.** All respondents agreed that the region would benefit from increased coordination and collaboration of economic development efforts. This was a consistent theme throughout each interview; it was mentioned several times by each respondent, including answers to different questions.
- **Few respondents are aware of the CEDS.** Five of the 10 interviewees were aware of the CEDS, but had never used it in their own efforts. Only one interviewee reported having used the CEDS document in the past. Four respondents had no familiarity with the CEDS before the interview process. The focus group provided similar results regarding awareness of current CEDS, with only four attendees being previously aware of the document.
- **To be useful, the CEDS must be more action-oriented.** Respondents reported a variety of suggestions to make the CEDS more relevant. These included: offering best practices, more assistance to entrepreneurs, and connecting local governing bodies with one another. Restarting past collaboration efforts in the valley and capitalizing on ongoing efforts on the coast could be useful for promoting regional coordinated action.
- **Economic development in rural areas is currently not a priority.** Respondents agreed that the needs of rural communities should be a priority in the region, offering differing strategies for its achievement. Suggestions included providing technical assistance and bringing more rural communities into regional economic development planning processes.
- **Needs of communities on the coast differ greatly from those in the valley.** Stakeholders indicated it is important that issues regarding inundation zones, infrastructure development, and funding sources for the coastal area be addressed more specifically in the updated CEDS.

Implications

The interview and focus group results provided insights into the perceptions and observations from the region's stakeholders. In updating the CEDS, CWEDD needs to take into consideration several factors including the following:

- **Rural communities should receive more attention at a regional level.** To address this, the strategy could include the creation of a Rural Economic Committee to focus specifically on issues important to this constituency in the region.
- **The region should focus on increasing collaboration and coordination.** This topic emerged multiple times and in different forms in every interview and during the Coastal focus group. Coastal communities currently coordinate to a significant degree yet remain distinct from the rest of the region in terms of collaboration. If members act regionally, there is likely to

be an increase in the relevance of CEDS to planning, promotion of economic development, and cooperation at a regional level.

- **Analysis of barriers and opportunities for business development also reinforces the need for more collaboration.** Better support for entrepreneurs to navigate complicated zoning requirements, better connection between workforce training and business needs, and better linkages between existing resources would facilitate growth and job creation across the region.
- **The region should focus on increasing its resilience to shocks from economic and other sources, such as natural hazards, which can impact local economies.** The slow recovery from the latest recession is an example of the region's weakness in withstanding economic shocks. More regional collaboration associated with more support for rural areas, increased collaboration between inland and coastal communities, more focus on innovative business and better marketing of region's advantages are examples of strategies to increase regional resilience.
- **There is an opportunity to create and enable better qualified graduates to fill local employment needs.** Many stakeholders identified the need to better connect educational institutions with the workforce needs of businesses. Currently businesses need to seek skilled employees from a much wider geography than the Cascades West region, despite the availability of two major universities and three community colleges.

Interview Findings

CEDS Relevance

Only 25% of respondents were familiar with the contents of the CEDS, and only one respondent reported having previously used the document. Seven respondents gave action-oriented examples of how to make the CEDS more relevant, including: assistance to entrepreneurs, connecting local governing bodies, inclusion of best practices, inclusion of useful information in the form of data, adopting existing local strategies, and being more action-oriented with regard to goals and objectives. From the coastal focus group, four of 10 participants had direct knowledge of the CEDS, and only one of the ten attendees had made use of the CEDS document in the past.

Strategy for Rural Communities

The majority of respondents believed the CEDS should prioritize rural areas, but only one mentioned a specific example of how: increase the capacity for providing technical assistance. The coastal focus group echoed this finding and suggested an action that addresses the geologic limitations on buildable lands. Respondents consistently supported the idea of prioritizing rural areas, but few were able to articulate why or how. All interviewees agreed that regional economic

development would be an important factor in the region's overall economic development.

Regional Collaboration

The need for more collaboration was the most mentioned theme in all interviews and was reinforced in the coastal focus group. Respondents stated that more formal collaboration and information sharing is critical to economic development efforts in the region. Due to their location, coastal communities - who collaborate well among each other - have been isolated from collaborating more extensively with inland communities due to geography and the different economic qualities each possess. Respondents stated that increased collaboration and coordination is needed in the agricultural, food and seafood industries, and entrepreneurial innovation sectors. The lack of coordination between the public and private business sectors were also mentioned as consistent weaknesses, indicating the opportunity for stronger ties and an increased understanding of business needs. All interviewees mentioned the Regional Accelerator Innovation Network (RAIN) as a successful example of collaboration. Expansion of this and other entrepreneurial based groups throughout the region, especially in coastal and rural communities, was mentioned in response to other questions.

Economic Development Priorities

The interviews revealed several economic development priorities for the region. Despite the different qualities of the coastal and valley regions, individuals from both sub-regions noted the difficulty in obtaining funding for projects that depend on a healthy tax base. Building needed infrastructure, (e.g. water and sewer lines or broadband connectivity) is essential to economic activities. In particular, the coastal focus group noted the limited availability of buildable land, a factor of physical and regulative land use restrictions that do not consider the need for economic growth as a decision-making factor. In response to the question "What would be the newspaper headlines in the region five years from now?" key response themes revolved around success rate in job creation and use of renewable energy.

Ideas to facilitate economic development included the following: expansion of the Regional Accelerator and Innovation Network (RAIN); improved education and training linking educational and institutional offerings to local business needs; improvement of hard infrastructure over the next five years to increase the region's overall attractiveness to prospective businesses and industries; increased support from the CWEDD and Councils of Governments (Cascades West and Lane) for local communities who might otherwise not participate in economic development planning.

Business Retention / Expansion / Attraction

Stakeholders also identified a number of major barriers and opportunities for business growth and attraction in the region through the interviews and focus group. The following summarizes key points and themes that emerged during the outreach process.

Barriers:

- The region's COGs have financial resources for broad based issues, but need to significantly increase their awareness of what the businesses want and need in order to be successful.
- The region has not effectively marketed or leveraged its unique advantages to the rest of Oregon, the nation, and the international trade markets.
- There is a desire for increased business outreach, and inclusion of the private business sector in regional planning processes.
- Centralized coordination of regional efforts are not functioning efficiently or at capacity, which does not directly inhibit growth, but does not further it either.
- There are administrative barriers to opening and doing business.
- Restrictive government regulations and land-use restrictions.
- Lack of trained workers with skills to meet employer needs.
- Loss of highly educated individuals to places with higher wages and lower housing costs; lack of workforce housing means the region attracts/retains fewer highly skilled workers.
- Lack of civil service employees retained long term with NOAA due to lack of services, cultural diversity, and the general rural nature of the region.
- Lack of "Lay-Down" acreage for the transfer of goods between shipping modalities.
- Distance from airports, and lack of consistency in service at Eugene's Mahlon Sweet Airport.
- Floodplain designations hinder development and availability of developable land.
- Overlapping responsibilities of estuary management on the coast.
- Properly zoned and attractive lots exist, but due to inadequate infrastructure, they are unable to support new businesses.
- Lack of access to funding and low-interest loans in order to help develop the infrastructure to make these lands attractive and able to support new development.
- High cost of land in coastal communities where buildable land is limited by geography prevents development.
- No clear definition of tsunami inundation zones in the coastal region.

Opportunities:

- The expansion of the Regional Accelerator Innovation Network (RAIN) outside the metropolitan areas of Eugene and Corvallis.
- Leverage the efforts of Senator Roblan's existing Coastal Caucus event which already includes an economic development strategic planning component.
- Greater support from the regional level down in marketing and branding efforts, particularly for smaller rural communities who lack staff and funding.
- Analysis of the statewide Port Plan to identify where infrastructure needs are, and the state-wide priorities.

- Tap into Existing collaborations such as Yaquina Bay Ocean Observing Initiative (YBOOI), and the Yaquina Bay Economic Foundation.
- Communication to planning commissions that it's okay to evaluate land use decisions in favor of economic development decisions
- Connecting educators and centers of higher learning with the business community in order to produce graduates with the skills today's marketplace requires.
- Increasing support for vocational and technical educational/training opportunities (e.g. fishing, marine sciences).
- Creation of Business Enterprise Overlay zones.
- Creation of "Lay-Down" areas for transportation modality transfers.
- Adaptive and attractive building codes and processes.
- Centralized technical assistance to rural communities who lack staff and funding.
- Provide access to best management practices at a regional level for private businesses.
- Access to conformity of language and goal alignment materials in a regional level in the public sector.
- Increasing regional knowledge and familiarity of what CEDS is and how it can be successfully leveraged and implemented.
- Creation of a "Cultural Corridor" or similar thematic working groups with common interests and goals.
- Marketing of the regions significant research and educational assets which include two major research universities, three community colleges and the Oregon Museum of Science and Industry (OMSI) Coastal Discovery Center at Camp Gray.
- Development of momentum to attract people to the region. Create incentives for people to stay.
- Leveraging Interstate 5 which bisects the region, offering access to markets from Mexico to Canada along the Pacific boundary of the United States.
- Increased understanding of each jurisdictions goals and objectives, providing the mechanism for pooling and leveraging resources cooperatively.
- Use research generated at the universities to promote the development of value-added forest products businesses.

Economic Resilience

There was no consensus regarding what economic resilience looks like in the region, or how to incorporate it into future planning. Resilience in an all-hazards general sense is described as the ability to Anticipate, Absorb, Adapt, and Respond to a shock. The majority of respondents believe the region is not currently resilient to shocks. Half of respondents believe CEDS is important in promoting economic resilience, suggesting more collaboration, stronger connections between education and business needs, and the use of scenario planning in preparation for disaster recovery. The coastal focus group identified a regional need for increased support and training for continuity planning which enables businesses to get back to

recover operations faster after a shock. Respondents identified a need to discuss backup infrastructure options for when resources are impacted by shocks. Most respondents also considered it critical for the CEDS to consider business impacts resulting from chronic stressors along with catastrophic events.

Workforce Development

Currently, graduates produced through higher education and vocational training are not meeting the needs of prospective employers. Some respondents mentioned a lack of skilled, trained tradespersons such as electricians, plumbers, welders, heating, and others related to the construction field. In coastal communities this manifests in the need for trained divers, welders, bilge pump engineers, and other trades which are specific to a maritime economy. Training local residents, and keeping them in the region for the long term is a need that can be met by effectively partnering with the regions significant educational institutions. Respondents indicated there is significant unrealized potential in connecting educational institutions and business in a deliberative effort to meet the needs of current residents and employers.

Respondents also reported that a barrier to attracting and retaining a skilled workforce is the lack of affordable housing in a limited market. An aging housing stock inhibits the region's ability to attract and retain skilled workers. Land Use laws in the State of Oregon places strict limits on city growth via Urban Growth Boundaries, the effect of which limits where development can occur. This has the effect of requiring cities to incentivize redevelopment of existing developed properties, a time consuming and long term exercise involving the cooperation of land owners and the active involvement of municipalities. In smaller communities this can be challenging with inadequate staff and lack of funding.

Coastal focus group attendees also highlighted the challenges faced in their communities. The maritime industry and research facilities located on the coast are less attractive to potential new hires where there may not be enough cultural diversity and or social incentives to attract and retain highly educated, discerning professionals. This also speaks to the needs the spouses of these individuals, who themselves are often highly educated and in need of employment.

Appendix J: Economic Resilience Assessment

Cascades West Economic Development District



September 2016

APPENDIX

Prepared for:
Cascades West Economic Development District

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About the Community Service Center

The Community Service Center (CSC), a research center affiliated with the Department of Planning, Public Policy, and Management at the University of Oregon, 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 the CSC 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.

About Community Planning Workshop

Community Planning Workshop (CPW) is an experiential service-learning program within the Department of Planning, Public Policy and Management at the University of Oregon. Students work in teams under the direction of faculty and Graduate Teaching Fellows to develop proposals, conduct research, analyze and evaluate alternatives, and make recommendations for possible solutions to planning problems in Oregon communities. The CPW model is unique in many respects, but is transferable to any institution that desires to link pedagogy with community service.

About the EDA University Center

The University of Oregon (UO) Economic Development Administration University Center (EDAUC) is a partnership between the Community Service Center, the UO Department of Economics, the Oregon Small Business Development Center Network and UO faculty. The UO Center provides technical assistance to organizations throughout Oregon, with a focus on rural economic development. The UO EDAUC seeks to align local strategies to community needs, specifically with regards to building understanding of the benefits of sustainable practices and providing technical training to capitalize on economic opportunities related to those practices. The UO EDAUC is partially funded through a grant from the U.S. Department of Commerce, Economic Development Administration.

About the Oregon Partnership for Disaster Resilience

The Oregon Partnership for Disaster Resilience (OPDR) is a coalition of public, private, and professional organizations working collectively toward the mission of creating a disaster-resilient and sustainable state. Developed and coordinated by the Community Service Center at the University of Oregon, the OPDR employs a service-learning model to increase community capacity and enhance disaster safety and resilience statewide.

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INTRODUCTION AND BACKGROUND

Resilience is more than a buzzword. Resilience and disaster recovery planning are economic imperatives in a modern economy, and more and more studies are showing the financial benefits.

The U.S. Department of Commerce's Economic Development Administration (EDA) has developed updated guidelines for communities creating or updating a Comprehensive Economic Development Strategy (CEDS) as part of federal regulations that went into effect in early 2015. For the first time ever, EDA has included an economic resilience component in the updated guidelines. According to the National Association of Development Organizations (NADO), economic resilience is highlighted in a CEDS through "planning and implementing resilience, establishing information networks, conducting pre-disaster recovery planning, and measuring resilience."¹

Purpose

The purpose of this Appendix is to bring together economic and hazard planning information to (1) assess the economic resilience of the region, (2) identify goals and objectives specific to economic resilience, and (3) identify a range of activities aimed at reducing risks to the regional economy.

Establishing economic resilience in a local or regional economy is paramount to overcoming and avoiding the negative impact of unavoidable shocks or threats. According to the Rural Policy Research Institute, "Shocks can include natural events, often but not always weather-related; human-made events, such as terrorism or nuclear or chemical accidents; medical events, such as pandemic diseases; and economic events, such as the collapse of an



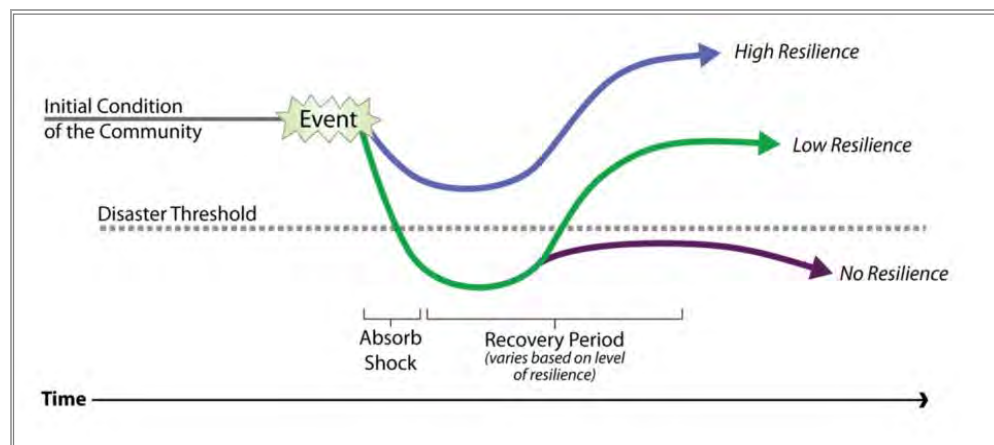
¹ <http://www.nado.org/integrating-resilience-into-the-ceds/>

industrial sector or the cessation of a vital economic activity. These events may, and often do, occur in some combination, thus multiplying the impacts on a community or region.”² In this context, we also include impacts from emerging or evolving variables such as climate change, sea level rise, globalization, changes in technology, etc.. Resilience includes (1) anticipating potential risks, (2) knowing how those risks might impact your region economically, and (3) creating a detailed response to protecting those identified risk areas.

This Appendix helps identify regional vulnerabilities, and prevent and respond to economic disruptions. This is an important step in expanding economic development strategies to include potential major losses due to ill-prepared infrastructure and unidentified weaknesses in the supply chain. This involves surveying areas, such as energy plants and water supply facilities, and ensuring they are equipped to overcome disasters, deal with the changing climate, and be used as assets in times of emergency rather than liabilities.

Figure 1 shows a conceptual diagram of how the level of pre-event resilience contributes to level and length of time communities take to recover post event.

Figure 1: Community Resilience Pathways



Source: Oregon Partnership for Disaster Resilience

² Dabson, B. 2012. "Regional Resilience Research and Policy Brief," Rural Policy Research Institute (RUPRI) Rural Futures Lab, Harry S Truman School of Public Affairs, University of Missouri, Page 9.

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, and (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 a responsive capacity. Often, the shocks/disruptions to the economic base of an area or region are manifested in three ways:

- Downturns or other significant events in the national or international economy which impact demand for locally produced goods and consumer spending;
- Downturns in particular industries that constitute a critical component of the region's economic activity; and/or
- Other external shocks (a natural or man-made disaster, closure of a military base, exit of a major employer, the impacts of climate change, etc.).

Background

The International Economic Development Council (IEDC) is the world's largest economic development membership organization. With funding from the EDA, the IEDC recently released a publication entitled "*Leadership in Times of Crisis: A Toolkit for Economic Recovery and Resiliency*." The document concludes, in part, that individual business owners cannot be expected to prioritize disaster recovery or resilience. Rather, the publication strongly promotes the role of economic development organizations in spearheading efforts for greater economic resilience.

Notably, the publication explicitly promotes the establishment of relationships between economic development organizations and emergency management. The Cascades West Economic Development District (CWEDD) has expressed a strong desire to address economic resilience in the CEDS update process. CWEDD wants to be at the forefront of resilience planning so that the region can be prepared for the inevitable and also be able to react to the unexpected. This economic resilience assessment is intended to allow for reduced economic burden and better overall preparation in times of distress.

Title 13, Chapter III, Part 303 of the Code of Federal Regulations outlines the requirements for Planning Investments and Comprehensive Economic Development Strategies (CEDS). The regulations state that a CEDS must: “. . . promote Regional resiliency and be unique and responsive to the relevant Region.” According to EDA, all communities should evaluate their economic vulnerabilities and develop strategies to mitigate potential impacts to the regional economy. EDA suggests the following activities and projects:

- *Identify persistent economic challenges or deficiencies:*
What are the region’s economic vulnerabilities? Is there a singular issue or is it a more holistic problem? Is there a long-term plan for addressing economic vulnerabilities?
- *Prepare for disruptions by identifying “early-warning” tools:*
Will the region be able to react swiftly and efficiently in the event of a disaster? Is communication between economic development professionals and local/regional emergency managers efficient and active? Are there actuarial systems in place to monitor assessment efficiencies?
- *Build mechanisms that create flexibility:*
Do the local governments and major employers have access to “surge” capital/credit resources or funds available for emerging diverse economic sectors? Are there resources available to retrain and re-align workforces post-disruption?
- *Promote a positive vision for the region:*
Is there positive messaging about the region’s assets and opportunities? Do stakeholders understand that actions that build resilience are good for the regional economy? Are economic shocks used as an opportunity to “re-vision” and spark economic activity?

Economic Benefits of Resilient Communities

Investments in hazard mitigation through supportive infrastructure, streamlined supply chains, and proper communication techniques have positive cost-benefit outcomes. According to the Multihazard Mitigation Council, a dollar spent on hazard mitigation saves society about \$4 in future benefits.³ Judith Rodin, President of the Rockefeller Foundation and author of the book *The Resilience Dividend*, argues that it costs 50% more to rebuild in the wake of a disaster than to build infrastructure to withstand the shock.⁴

³ The Multihazard Mitigation Council, *Natural Hazard Mitigation Saves: An Independent Study to Assess the Future Savings from Mitigation Activities. Volume 1 — Findings, Conclusions, and Recommendations*, National Institute of Building Sciences, Washington, D. C., 2005.

⁴ Rodin, J. 2014, January 22. Realizing the Resilience Dividend [Web log post]. The Rockefeller Foundation. Retrieved from <http://www.rockefellerfoundation.org/blog/realizing-resilience-dividend>.

The following sections summarize arguments that support making resilience-based investments. Ed MacMullan, economist at ECONorthwest, developed this summary following a review of economic literature and community resilience.

Fiduciary Responsibility

Government officials who manage taxpayer assets have a fiduciary responsibility to manage and invest funds wisely, and manage assets carefully. Natural and man-made disasters threaten these investments and assets. To the extent that private businesses rely on municipal investments and assets (e.g., roads, bridges, water supply, etc.), municipal investments and asset management can also affect the performance and success of local businesses. Prudent management of municipal investments and assets takes current information on risks of natural and manmade disasters into account when making future investments, or acquiring/constructing new assets (e.g., building a new school).⁵

Competitive Advantage or Disadvantage

As tsunami threats to the Oregon Coast become more well-known (As evidenced by the recent *New Yorker* article⁶ on the Cascadia earthquake and tsunami) tourists and businesses may start comparing coastal locations when making vacation and investment decisions. To the extent that tourists feel unsafe about vacationing in certain locations, they may avoid those areas and spend their vacation dollars elsewhere. Likewise, business owners and investors may have concerns over the security of investing in communities that lack a resiliency plan for their tsunami risks and make investments elsewhere. Coastal communities can increase their competitiveness for tourism and investment dollars by developing tsunami resilience measures and advertising these measures. They can use this information to distinguish themselves from other coastal communities that remain silent on the threats and their lack of response to those threats.⁷ This rationale applies to other hazards in Oregon, such as floods, earthquakes, and wildfires.

Big Return On Resiliency Investments

Results from past investments show that municipal and business investments in resiliency actions pay big dividends in the form of avoided damages, costs and lost

⁵ Rosenberg, M. 2014. "Insurer's Climate Change Class Actions: More to Come?" Insurance Journal. <http://www.insurancejournal.com>. May 19; Grosvenor. 2014. Resilient Cities. A Grosvenor Research Report.

⁶ Kathryn Schulz, "The Really Big One," *New Yorker*, July 20, 2015.

⁷ Tjandradewi, B.I. 2013. Towards a post-2015 framework for disaster risk reduction. Building the resilience of nations and communities to disasters. Post-2015 Framework Website Blog <http://www.preventionweb.net/postfa/dialogue/discussion/26/>. March; Stevenson. J. 2014. Organisational resilience after the Canterbury earthquakes; a contextual approach. A thesis submitted in partial fulfillment of the requirements for the Degree of Doctor of Philosophy in Geography at the University of Canterbury; UNISDR. 2012. How to Make Cities More Resilient A Handbook for Local Government Leaders. A contribution to the Global Campaign 2010-2015 Making Cities Resilient My City is Getting Ready!. Geneva. March.

business activity.⁸ Recent estimates of the benefit-cost ratios for resiliency investments, or the dollars of resiliency investments compared with the dollars of avoided damage, include the following:

- Federal Emergency Management Agency (FEMA) mitigation grants average 1:4; varies from 1:1.5 earthquake to 1:5 for flood mitigation.⁹
- United Nations Office of Disaster Risk Reduction calculated 1:10, or \$10 of avoided direct and indirect damage for every \$1 invested.¹⁰
- American Society of Civil Engineers calculates 1:6 for levees, and 1:3 to 1:4 for other flood control measures.⁹
- Orion utility company in New Zealand measured 1:10 after Christchurch earthquake.¹¹

Studies conducted after natural disasters found that businesses that invested in resiliency measures suffered less economic loss compared with businesses that had not made such investments. The average economic loss for firms in the two categories was \$478,000 loss for firms that invested in resiliency measures, and \$3.4 million loss for firms that had not made such investments.¹²

Developing and implementing resiliency plans can also pay dividends by helping insurers assess a city's level of risk and allow them to adjust premiums for well-prepared cities, or possibly write policies where none existed previously.¹³

Strengthen Local Economies

Results of studies of how natural disasters affect communities and organizations show that disasters accelerate existing pre-disaster economic and development trends.¹⁴ Entities that were performing poorly before a disaster tended to have less capacity to cope with disruptions compared to those that were performing well.¹⁵ Resiliency investments can help strengthen local economies by increasing spending in the local economy through hiring preferences for local workers and purchasing

⁸ The Multihazard Mitigation Council. 2005. *Natural Hazard Mitigation Saves: An Independent Study to Assess the Future Savings from Mitigation Activities*. Volume 1 — Findings, Conclusions, and Recommendations. National Institute of Building Sciences. Washington, D. C.

⁹ Rose, A., et al. 2007. "Benefit-Cost Analysis of FEMA Hazard Mitigation Grants," *Natural Hazards Review*. November, pages 97-111.

¹⁰ Wimmers, A. 2014. "Building the Business Case for Resilience Investment," *Insight Magazine*. KPMG International Cooperative.

¹¹ Wimmers, 2014.

¹² UNISDR. 2012. *Making Cities Resilient Report 2012*. www.unisdr.org/campaign. October.

¹³ UNISDR. 2012. *How to Make Cities More Resilient A Handbook for Local Government Leaders*.

¹⁴ Colten, C., R. Kates, and S. Laska. 2008. *Community Resilience: Lessons from New Orleans and Hurricane Katrina*. Community & Regional Resilience Initiative. CARRI Report 3. September.

¹⁵ Stevenson, 2014.

from local vendors.¹⁶ Disaster risk reduction can also be a business opportunity for the private sector.¹⁷

Darlington, WI Case Study

One story that speaks to the efficacy of economic resiliency is Darlington, Wisconsin. Darlington historically suffered from regular flooding, with large noteworthy floods occurring in 1950, 1959, 1969, and 1990. Finally, after the, “Great Flood of 1993”, in which 20-30 percent of the town was inundated, the City decided to take long-term action to develop a resilience plan to counter the negative economic effects. Mayor Bev Anderson, who spearheaded the effort, says “collaboration, cooperation, and coordination” were crucial to the program’s success. The multi-sector approach that Darlington and partners took has had a remarkable impact on the town. Rather than allowing it to deteriorate under the stress of repeated floods, it is now a tourist destination spot with a small, but vibrant downtown. As a result of the revitalization and flood mitigation, it is estimated that property values for commercial buildings along Main Street nearly doubled.

The success of Darlington didn’t happen by chance. It was a highly orchestrated plan consisting of a variety of collaborations and cross-sectoral resources. Success came from developing an interagency coalition for, “promoting the cooperation of government – local, state, and federal – and businesses.”

<http://www.nado.org/wp-content/uploads/2011/07/NADOResilientReport.pdf>



Downtown Darlington after flood-proofing.
Source: Rosanne K. Gray, Wisconsin Emergency Management.

¹⁶ UNISDR. 2012. *How to Make Cities More Resilient A Handbook for Local Government Leaders*.

¹⁷ UNISDR. 2012. *Making Cities Resilient Report 2012*.

PRINCIPLES OF RESILIENT SYSTEMS

One way to frame resilience is through a set of principles. Principles can apply across systems and are useful in establishing first-order considerations organizations can use when making decisions. Applied to economic development, resilience principles provide a framework for strategic investments and planning. In 2014, Cambridge University Press (2014) published, *“Principles for Building Resilience: Sustaining Ecosystem Services in Social-Ecological Systems.”*¹⁸ The University of Oregon Community Service Center (CSC) adapted and distilled those seven principals into three primary principles focused on economic-development.

Principle I: Maintain Diversity and Redundancy

Diversity and redundancy can be summed up with the phrase, “don’t put all your eggs in one basket.” Diversity and redundancy can be thought of like an umbrella insurance policy that covers a disaster or natural hazard. In an economic sense, this strategy is routinely used by farmers who plant a diverse rotation of crops that hedges against the unexpected negative impact of crop failure. In the long run diversity and redundancy of systems will pay off when systems fail. Part of this philosophy is to ensure that linkages between systems are documented and that communication lines are established between systems. This will result in faster recovery from disturbances.

One of the key challenges is balancing the need for economic diversity and economic efficiency. According to the New Economics Foundation, a United Kingdom think tank, “beyond a certain point, increasing financial system activity may serve only to reduce resilience without any meaningful benefit to society.” Yu Xiao and Joshua Drucker in their paper, *“Does Economic Diversity Enhance Regional Disaster Resilience?”*, state:

“In normal times, diversity benefits employment growth but hampers income gains, a tradeoff that may reflect conflict between economic diversity and the efficiency advantages of specialization. We do not know yet how public policies or particular regional traits might diminish or negate this tradeoff. Planners and policymakers should consider

Does Economic Diversity Enhance Regional Disaster Resilience?

In 2013, Yu Xiao & Joshua Drucker conducted original research entitled, *“Does Economic Diversity Enhance Regional Disaster Resilience?”* Published in the Journal of the American Planning Association, Xiao and Drucker used the 1993 Midwest floods to discern between varying levels of economic resilience in relative to difference levels of in diversity within the affected communities. The researchers found that (1) economic diversity boosted employment growth and accelerated income recovery after the flood, allowing for quicker post-disaster recovery and resilience, and (2) that damaged areas lacking in economic diversity will likely experience larger setbacks in employment and income growth.

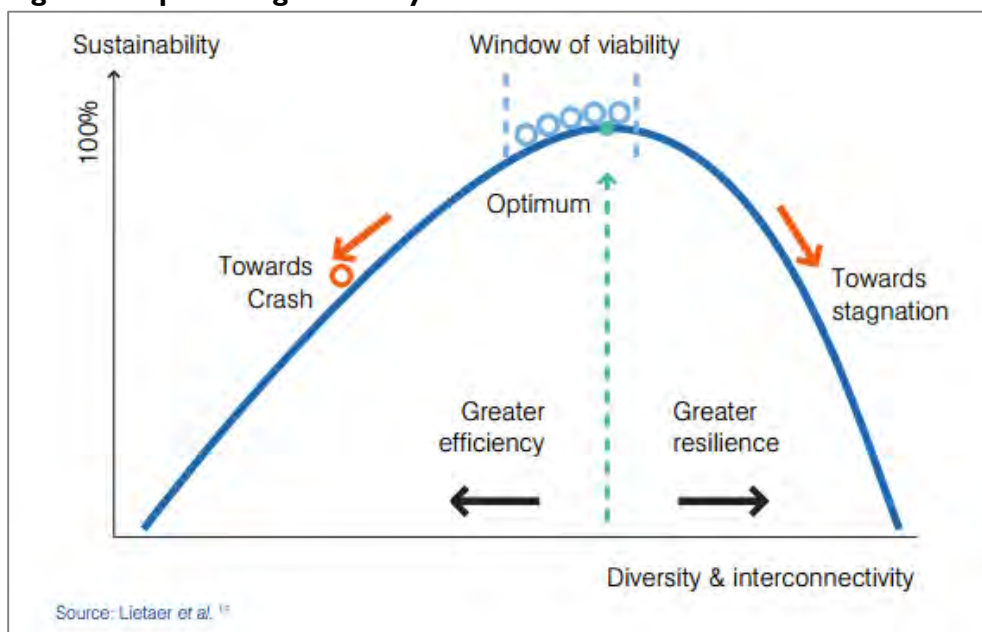
Xiao and Drucker, “Does Economic Diversity Enhance Regional Disaster Resilience?” *Journal of the American Planning Association*, Vol. 79, Iss. 2, 2013.

¹⁸ Simonsen, et al. *Applying Resilience Thinking Seven Principles for Building Resilience in Social-Ecological Systems*. Stockholm Resilience Center.

these outcomes and recognize that some policies may represent compromises among different economic development aims. Ultimately, planners must understand that there are risks in designing policies that promote (or disregard) regional economic diversity.”¹⁹

The diagram in Figure 2 shows a visual representation of the optimal balance of resilience vs. efficiency. The goal in developing resilience programs is to remain as efficient as possible, while also being realistic that preparing for inevitable downturns and disasters does have an initial and ongoing investment cost. Being able to balance diverse and interconnected systems, without sacrificing efficiency, is the ultimate goal.

Figure 2: Optimizing efficiency and resilience



Source: New Economics Foundation²⁰

Principle 2: Foster Complex Adaptive Systems Thinking

Principle 1 implies that connections and interdependencies matter. In fact, the more diversity and redundancy in a community, the greater the “need to understand the complex interactions and dynamics that exist.”²¹ In order to be most efficient in our diverse systems, coordination must occur across sectors and systems. Adopting a resilient and adaptive systems framework is important to

¹⁹ Xiao and Drucker, “Does Economic Diversity Enhance Regional Disaster Resilience?” *Journal of the American Planning Association*, Vol. 79, Iss. 2, 2013.

²⁰ Lietaer et al., “Money and Sustainability: The missing link,” A report from the Club of Rome – EU Chapter to Finance Watch and the World Business Academy. Axminster: Triarchy Press, 2012; figure reproduced in Berry et al., “Financial System Resilience Index: Building a strong financial system,” a publication of the New Economics Foundation, 2015.

(http://b3cdn.net/nefoundation/3898c6a7f83389375a_y1m6ixqbv.pdf)

²¹ Ibid

anticipate and account for these interdependencies. The Stockholm Resilience Center cites several strategies for fostering complex adaptive systems thinking:

- **Adopt a systems framework.** This can help business owners and economic development professionals increase their understanding of interdependencies and relationships. For example, recognizing linkages between the private sector and public infrastructure, or between the economy and the environment.
- **Expect and account for change and uncertainty.** Businesses can employ scenario planning to explore and evaluate alternative economic development strategies, and to assess the intended and unintended consequences of different decisions. What happens to agriculture with a significant drought or other changes to the regional climate regime? How does a subduction zone earthquake impact the infrastructure that regional manufacturers rely on?
- **Recognize barriers to cognitive change.** Businesses, institutions, and organizations that could benefit from or capitalize on existing systems and approaches may resist adaptive systems thinking, particularly if it challenges a “business as usual” approach. For example, virtually all commerce and the infrastructure systems that support commerce in Oregon rely on fossil fuel. Roughly 90% of the state’s supply of fossil fuel is located in a single area north of Portland that is critically vulnerable to a large earthquake.

Bourne, MA Success Story

This case shows how public-private alliances, and creative thinking, can enhance both the local economy and local safety.

City leaders of Bourne, Massachusetts had wanted to revitalize their decaying downtown since the 1960s, but frequent coastal flooding and uncertain flood regulations had prevented developers from acting. Further, it was not physically or financially feasible to relocate the downtown. The economic development community generated more interest and buy-in to hazard mitigation than the town planner and emergency manager were able to do on their own. By treating the future of their downtown as an “open book,” working creatively with a large non-profit to re-imagine how new development could both reduce flooding hazards and inspire other owners, working to upgrade and expand wastewater treatment capacity that is a constraint on new business, and considering revolving loan funds and other means to reduce landowners’ redevelopment costs, the City is moving towards a brighter future for its downtown businesses.

[Source: Hazard Mitigation: Integrating Best Practices into Planning, Schwab, American Planning Association, 2010]

Principle 3: Broaden Participation

One way to increase diversity and foster complex systems thinking is to invite more stakeholders and individuals to participate in the economic development process. Broad participation builds trust and creates a greater understanding. In addition, it has the potential to attract resources, perspectives, and solutions that might otherwise not be available. Important things to consider in engaging more people include: clarifying goals and expectations, getting the right people involved, finding leaders that can mobilize the group, providing capacity building, dealing with power issues and potential conflicts, and securing sufficient resources to enable effective participation.

The Stockholm Resilience Center presents several guidelines that can contribute to effective participation from a diverse set of stakeholders. While these are in no way groundbreaking, they are often overlooked:

- Clarify your goals and expectations of the participation process;
- Get the right people involved;
- Find inspired and motivated leaders that can mobilize the group;
- Provide capacity building;
- Deal with power issues and potential conflicts; and
- Secure sufficient resources to enable effective participation.

100 Resilient Cities: A Resource

The 100 Resilient Cities is an initiative pioneered and funded by The Rockefeller Foundation. The goal is to build capacity for a global network of cities dealing with similar and challenging resiliency issues from natural hazards to unemployment and violence. Cities in the 100 Resilient Cities network are provided with the resources necessary to develop a roadmap to resilience along four main pathways:

- Financial and logistical guidance for establishing an innovative new position in city government, a Chief Resilience Officer, who will lead the city's resilience efforts;
- Expert support for development of a robust resilience strategy;
- Access to solutions, service providers, and partners from the private, public, and Non-Governmental Organization sectors who can help them develop and implement their resilience strategies; and
- Membership of a global network of member cities who can learn from and help each other.

[Rockefeller Foundation 100 Resilient Cities](#)

REGIONAL ECONOMIC RESILIENCE ASSESSMENT

This resilience assessment strives to identify economic vulnerabilities that can inhibit short- and long-term economic recovery after a major disaster event. The assessment includes two primary steps: (1) a survey of local government representatives, economic development experts, and business representatives, and (2) a high-level analysis of critical supply chain linkages and infrastructure.

Economic Development Stakeholder Survey

As part of the CEDS update process, CSC administered a survey to gauge perceptions of the strengths, weaknesses, opportunities, and threats in the region. Eighty-two stakeholders throughout the Benton, Lane, Lincoln, and Linn County region responded. Fifty-six percent of respondents reported that they represent the government sector, 24 percent represent private businesses, and 20 percent represent non-profit organizations.

The survey asked respondents to provide their input on specific questions related to economic resilience. We present a summary of the resilience related findings below. For the complete survey results, please refer to CEDS Appendix H.

Resilience Specific Survey Results

First, survey respondents report limited confidence that the region can withstand or recover from a shock. Nearly 70 percent of respondents indicated that they disagreed or strongly disagreed that the region *as it stands currently* can recover from a significant disruption or disaster event. Survey respondents also report strong support for consideration of resilience in economic development planning. Seventy-nine percent of respondents reported that it is slightly or very important for the region's economic development strategy to consider business impacts resulting from *chronic* stresses (such as winter storms or workforce availability). Eighty-nine percent reported that it is slightly or very important for the CEDS to consider business impacts resulting from *catastrophic* events. These results suggest a significant gap between where respondents perceive the region is currently with respect to resilience and where it wants or needs to be.

Next, the survey asked respondents to indicate the extent to which characteristics commonly found in economically resilient communities are present in the CWEDD region. Selected responses are organized below by the three economic resilience principles: (1) maintain diversity and redundancy; (2) foster complex adaptive systems thinking; and (3) broaden participation.

Principle I: Maintain Diversity and Redundancy

When asked if economic leaders actively identify local and regional partnerships that contribute to economic diversification, over half of the respondents agreed,

some strongly, that this characteristic is present in the region. That economic diversity is a focus within the region is supported by data from the University of Illinois at Urbana-Champaign Regional Economic Applications Laboratory. Their research shows that the CWEDD region has a high to very-high levels of industry and occupational diversity across the four counties.²²

However, when asked if economic development plans are well integrated into planning activities, 65 percent *disagreed* that this is happening. Ensuring that economic considerations are including in, for example, FEMA compliant Natural Hazard Mitigation Plans, is one way to ensure economic diversification goals are understood by local emergency managers. Further, such participation ensures that emergency managers have an opportunity to comment on economic development strategies and projects. The debate over OSU's expansion of its Hatfield Marine Science Center in Newport is illustrative. On the one hand, the project represents significant potential economic gains for the City of Newport, Lincoln County, and the CWEDD. On the other hand, the addition of up to 500 additional students and faculty, and a huge investment of state money in the tsunami inundation zone will increase vulnerability in the South Beach area. The trade-offs associated with such decisions are complex. However, without intentional integration of economic, land-use, infrastructure and emergency management plans, communities can actually make large economic investments that actively reduce community and economic resilience.

Principle 2: Foster Complex Adaptive Systems Thinking

The survey asked about the extent to which organizational structures are in place to manage business response and recovery efforts. A strong majority of respondents (63 percent) *disagreed* that such structures are present. Similarly, 56 percent of respondents *disagree* that local funding mechanisms for post-disaster small business financing are available. This suggests that under Principle 2, the CWEDD could encourage systems (e.g. local recovery funding mechanisms) and structures (e.g. business recovery center(s)) that can support businesses following a disaster.

Notably, respondents split on their assessment of whether the region has implemented strategies to ensure infrastructure systems will be available following a disaster. Forty-percent of respondents *agree or strongly agree* and 48 percent disagree or *strongly disagree* that infrastructure systems will be available. Given the Oregon Resilience Plan's assessment of critical infrastructure systems in the Willamette Valley, CWEDD can expect major disruptions to multiple critical infrastructure sectors including water, wastewater, transportation, electricity, communications, and emergency services. The survey findings suggest that for a large segment of the economic development community either (1) this information is not being communicated to economic development stakeholders or (2) members of the business community are not seeing a direct connection between the infrastructure systems that will be impacted and the business community's reliance

²² *Economic Diversity in Appalachia*, 2014, University of Illinois at Urbana-Champaign Regional Economic Applications Laboratory and the Center for Regional Economic Competitiveness. Website: <http://economicdiversityinappalachia.creonline.org/>.

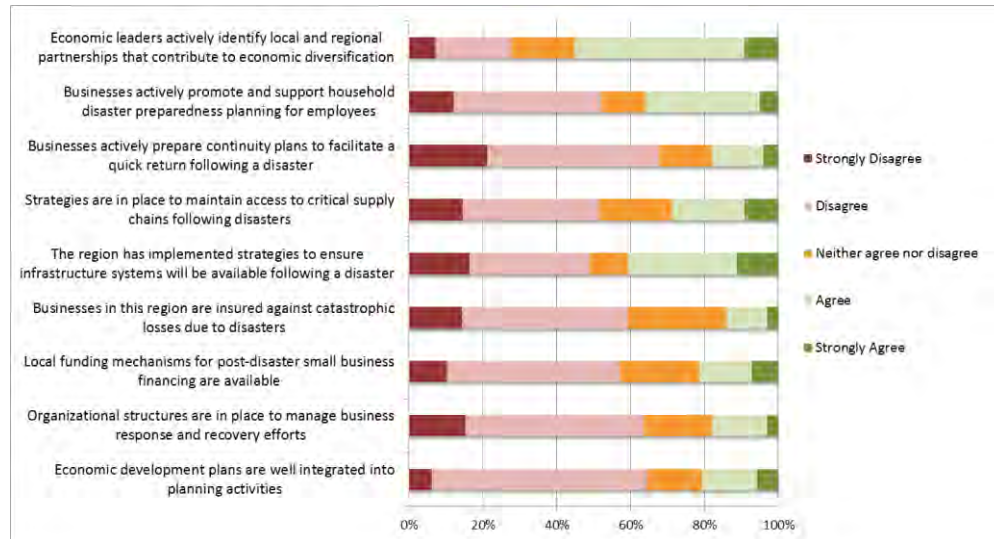
on those infrastructure systems. Either way, CWEDD can improve resilience by fostering regional understanding of the relationships between the public and private sector, how those relationships may need to adapt to changing threats in the region and how to embrace complexity in closing the “resilience gap.” Further, the private sector can and should actively participate in or co-lead local and regional Natural Hazard Mitigation Planning and Post-Disaster Recovery Planning activities.

Principle 3: Broaden Participation

One way to increase economic resilience is to ensure that members of the business community are following best-management practices, such as the preparation of business continuity plans. Notably, 67 percent of survey respondents indicated that businesses in the region are not actively preparing continuity plans to facilitate a quick recovery post disaster. A simple goal for the region then would be to increase the number of businesses that are developing business continuity plans. Numerous templates exist, including popular online resources through the Institute for Business and Home Safety’s *Open for Business* program.²³

Another way to broaden participation is by ensuring participation from a wide range of stakeholders. For example, the survey asked respondents the extent to which they *agreed or disagreed* that “local funding mechanisms for post-disaster small business financing are available” and that “organizational structures are in place to manage business response and recovery efforts.” A majority of respondents (56 percent and 63 percent respectively) disagreed, some strongly, that such mechanisms and structures are in place. One strategy to address these issues could be to facilitate conversations with local/regional lending and financial institutions about how to provide emergency loans and gap funding to local businesses following a disaster.

²³ <http://disastersafety.org/ibhs-business-protection/ofb-ez-business-continuity/>

Figure 3. Level of Agreement with Resilience Characteristics

Source: 2015 CWEDD Stakeholder Survey

Critical Supply Chain and Infrastructure Analysis

Disaster events can impact a range of private and public sector systems. Infrastructure, business, social, and environmental system impacts can result in impacts of interruptions to supply chains, workforce availability, distribution networks, communication systems, financial institutions, and wholesale/retail markets. Further, disasters can contribute to decreased production capacities, irregular cash flows, and an inability to transfer goods and services compared to times of strong economic health. Figures 4 and 5 show the types, probability, and vulnerability of natural hazards in the CWEDD by county. Chronic hazards, including flood, landslide, wildfire, and severe storms regularly impact transportation, electricity, and communication systems throughout the region with consequential impacts across a range of business sectors. Catastrophic hazards of concern in the region include earthquake, tsunami, and volcano.

Figure 4. Critical Threats & Vulnerabilities: Linn and Lane Counties

Hazard	Lane			Linn		
	Probability	Vulnerability	Total Threat Score	Probability	Vulnerability	Total Threat Score
Coastal Erosion	NR	NR	NR	-	-	-
Drought	Moderate	Moderate	113	NR	NR	NR
Earthquake (Cascadia)	High	Low	123	High	High	223
Earthquake (Crustal)	High	Low	123	High	High	223
Flood (Coastal)	NR	NR	NR	-	-	-
Flood (Riverine)	Moderate	Moderate	169	High	High	220
Landslide	Moderate	High	136	NR	NR	NR
Tsunami (Distant)	NR	NR	NR	-	-	-
Tsunami (Local)	Moderate	Low	110	-	-	-
Volcano	Moderate	Moderate	68	Moderate	High	192
Wildfire	Moderate	High	173	Moderate	Moderate	200
Windstorm			154	High	Moderate	189
Winter Storm (Snow/Ice)	Moderate	High	176	High	High	230
- = Not Applicable for this geography NR = Applicable Hazard that is not Rated						

Sources Lane 2015 Oregon Emergency Management Threat Assessment; Linn 2006 Oregon Emergency Management Threat Assessment

Figure 5. Critical Threats & Vulnerabilities: Lincoln and Benton Counties

Hazard	Benton			Lincoln		
	Probability	Vulnerability	Total Threat Score	Probability	Vulnerability	Total Threat Score
Coastal Erosion	-	-	-	High	Moderate	180
Drought	Moderate	Low	110	High	High	145
Earthquake (Cascadia)	Moderate	High	211	Moderate	High	209
Earthquake (Crustal)	Moderate	Moderate	190	High	Moderate	140
Flood (Coastal)	-	-	-	High	Moderate	160
Flood (Riverine)	High	Moderate	175	High	Moderate	180
Landslide	High	Low	151	High	Moderate	195
Tsunami (Distant)	-	-	-	High	Low	161
Tsunami (Local)	-	-	-	Moderate	High	201
Volcano	Moderate	Low	92	Low	Low	114
Wildfire	High	Moderate	170	High	Moderate	205
Windstorm	High	Moderate	165	High	High	240
Winter Storm (Snow/Ice)	High	Moderate	170	High	Moderate	213
- = Not Applicable for this geography NR = Applicable Hazard that is not Rated						

Sources: Benton 2015 Natural Hazard Mitigation Plan; Lincoln 2014 Natural Hazard Mitigation Plan

In order to mitigate economic losses in times of distress, an understanding and assessment of the supply chains and infrastructure linkages is needed. The Oregon Resilience Plan (ORP) completed in 2013, “. . . reviews policy options, summarizes relevant reports and studies by state agencies, and makes recommendations on

policy direction to protect lives and keep commerce flowing during and after a Cascadia earthquake and tsunami.” The ORP bases its assessment on the assumption the business can only tolerate two to four weeks of disruption. The plan (1) analyzes likely impacts of a 9.0 Cascadia earthquake and tsunami on a range of sectors, (2) defines acceptable timeframes to restore functions after an earthquake, and (3) recommend changes in practice and policies that will allow Oregon to reach desired resilience targets.

Figure 4 summarizes ORP findings with respect to key Willamette Valley and coastal infrastructure sectors.

Figure 6. Current Resilience Gap for Lifeline Infrastructure

Critical Service	Zone	Estimated Time to Restore Service
Electricity	Valley	1 to 3 months
Electricity	Coast	3 to 6 months
Police and fire stations	Valley	2 to 4 months
Drinking water and sewer	Valley	1 month to 1 year
Drinking water and sewer	Coast	1 to 3 years
Top-priority highways (partial restoration)	Valley	6 to 12 months
Healthcare facilities	Valley	18 months
Healthcare facilities	Coast	3 years

Sources: Oregon Resilience Plan

Key Industry Clusters

As outlined in CEDS Appendix C, the majority of industry clusters in the CWEDD are related to available natural resources - forestry, fishing, agriculture, and tourism. Manufacturing, high tech industry, and government employment complete the list. Cluster classification in the CEDS is primarily sourced through clustermapping.us except where noted. The CWEDD Critical Supply Chain and Infrastructure Analysis focuses is organized around major regional industry clusters and focuses on four critical infrastructure sectors: (1) transportation; (2) energy; (3) communication; and (4) fuel.

Forest Products

While declines in harvest rates have impacted forest products over the past three decades or more, the sector remains an import part of the regional economy. Growing efficiencies and diversity in the forest products sector has increased its

resilience by moderating some of the cyclic slumps and price swings evident in other industrial sectors.

Supply Chain and Infrastructure Dependence

The forest supply chain consists primarily of harvestable tree stands, primary wood processing facilities (such as saw or pulp mills), secondary wood processing facilities (such as structural wood products or paper products facilities), distribution, and wholesale/retail sales. The forest products sector relies primarily on the following critical infrastructure categories:

- Transportation, primarily roadway, rail, and marine
- Fuel, for harvest and transport
- Energy, for primary and secondary processing

Commercial Fisheries

Commercial fishing represents an important economic sector in the CWEDD. While economic activity is concentrated in Lincoln County, the sector represents significant economic activity in the CWEDD. The Port of Newport, for example, hosts more than 200 commercial vessel slips, 54 waterway related businesses, and a distant water fleet that annually brings in between \$14 million and \$32 million to the local economy.

Supply Chain and Infrastructure Dependence

The commercial fishing supply chain consists of access to viable fisheries; collection and primary processing facilities; secondary processing and value added products; distribution; and wholesale/retail sales. The fisheries sector relies primarily on the following critical infrastructure categories:

- Transportation, primarily marine, and roadway
- Fuel, for harvest and transport
- Energy, for primary and secondary processing

Agriculture

Agriculture is a dominant and visible sector in the CWEDD, particularly west of the Cascades. While crop diversity in the region has decreased significantly since the middle of the 20th century (with grass seed replacing many food crops for example), crop production remains strong. Notably, much of the food processing and storage infrastructure common in the region 50-years ago has been dismantled.

Supply Chain and Infrastructure Dependence

The agriculture sector supply chain generally consists of producers (i.e. farms and ranches), aggregation and trade, primary processing, secondary processing and wholesale/retail markets. Importantly, many food-related agriculture products are aggregated and shipped outside the region for processing. The agriculture sector relies primarily on the following critical infrastructure categories:

- Transportation, primarily roadway, rail, and marine

- Fuel, for production and transport

Tourism

Tourism is a strong and growing sector across the CWEDD. The sector supports significant employment, particularly in Lincoln County where 42% of the employment is tourism related. However, many jobs in this sector tend to be lower paying. Attractions in the region include the Oregon Coast, wineries, sporting events at the two universities, outdoor pursuits and the arts.

Supply Chain and Infrastructure Dependence

The tourism supply chain primarily consists of tangible (destinations and services) and intangible (atmosphere and experience) attractions, consumers with disposable income, and service providers. The tourism sector relies primarily on the following critical infrastructure categories:

- Transportation, primarily roadway, and aviation
- Fuel, primarily transportation
- Communication, to support service economy and transactions
- Energy, for service sector

High Tech

The high-tech sector holds a prominent economic position in the region east of the coast range. Wages in this sector are higher than in many others. However, the job market is relatively unstable with large losses in the 2000's contributing to a significant decline in employment over the last decade.

Supply Chain and Infrastructure Dependence

The high-tech sector supply chain primarily consists of raw materials, foundries, fabricators, inventory hubs, distribution, designers, manufactures, and retailers. Not included in the infrastructure list below is water, which is critical to many high-tech firms. In the OCWEDD, the high-tech sector relies primarily on the following critical infrastructure categories:

- Transportation, primarily roadway, rail, and aviation
- Fuel, primarily transportation
- Communication
- Energy, primarily for manufacture

Metals Manufacturing

Metals manufacturing is also concentrated east of the coast range with most of the activity occurring in Linn and Lane counties. Like high-tech, wages in this sector tend to be higher than others. Several of the region's manufactures are the only source for their product in the Western United States.

Supply Chain and Infrastructure Dependence

The metal manufacture supply chain primarily consists of raw materials, foundries, fabricators, distribution, wholesale and retail. In the CWEDD, the high-tech sector relies primarily on the following critical infrastructure categories:

- Transportation, including roadway, rail, marine, and aviation
- Fuel, primarily transportation related
- Communication
- Energy, primarily for manufacture

REGIONAL ECONOMIC RESILIENCE STRATEGY

This section presents a set of recommendations OCWEDD can use as a starting point to prioritize economic resilience activities in the region. The recommendations are framed around the three key principles of resilience. Basic, intermediate and advanced options are presented. Activities are not limited to CWEDD staff—all economic development professionals in the region should be pushing for a more resilient economy. It is not a matter of if the next shock comes—just a matter of when.

Recommendations²⁴

Basic Steps - Little to No Cost Actions to Take Right Now

Diversity and Redundancy

- Inventory local businesses capable of providing services, material, equipment, and workforce needed in the event of a catastrophe.
- Establish roles and responsibilities that economic development stakeholders in the region will need to fulfill following an economic shock or natural disaster.

Systems Thinking

- Involve economic development professionals and business representatives in emergency preparation, response, mitigation, and recovery planning activities.
- Promote the incorporation of recommendations from County and City Hazard Mitigation Plans into Economic Development Plans and Strategies.
- Encourage counties and cities in the region to adopt local recovery ordinances.

Broaden Participation

- Form a business continuity and disaster recovery working group.
- Encourage businesses to develop, test and implement business continuity plans.
- Discuss potential shocks, threats, disasters and risk reduction strategies at local chamber or business association “Lunch and Learn” events.

²⁴ These recommendations are informed by: (1) training materials for decision makers developed by Community Service Center (CSC) in partnership with Dr. Branden Johnson at Decision Research and Ed MacMullan, Economist at ECONorthwest. CSC adapted and modified some of the recommendations to better address conditions in the Cascades West Economic Development District. (2) The EDA and IEDC funded website restoreyoureconomy.org.

Intermediate Steps - Investing In Tomorrow

Diversity and Redundancy

- Establish a process to solicit, pre-approve and contract with local businesses, contractors and vendors for services, materials and equipment following a disaster.
- Partner with local businesses throughout the region to form an Economic Recovery Response Team.
- Ensure that economic development organizations, chambers of commerce, and business associations have arranged for alternate or backup office locations.

Systems Thinking

- Develop an economic recovery plan for the region.
- Update the economic development section of local comprehensive plans to include economic resilience considerations.
- Utilize external funding (such as the FEMA Hazard Mitigation Grant Program) as a way to leverage local funds for business-related mitigation activities. Or consider using Community Development Block Grants to retrofit buildings, elevate critical equipment or build to higher code standards.

Broaden Participation

- Partner with local businesses throughout the region to form an Economic Recovery Response Team.
- 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).

Advanced Steps - Lead By Example

Diversity and Redundancy

- In cooperation with large employers, business clusters, or dense commercial areas located within hazard zones, develop strategy to harden, elevate, re-locate or otherwise mitigate / prevent damage from natural hazards.
- Invest in diverse and redundant critical infrastructure systems (e.g. transportation, fuel, energy, communications, water, etc.).
- Prepare to establish a Business Recovery Center within one- to two-weeks of a major economic shock or natural disaster.

Systems Thinking

- Use creative financing, such as revolving loan funds, grants and tax relief to help businesses reduce risk.
- Promote economic resilience activities as a way to market the region and encourage local investment and entrepreneurship.

Broaden Participation

- Promote creation of local disaster recovery plans: This can be used to set goals and guide business' resiliency efforts within a documented and coherent strategy. This course of action will more effectively protect economic development efforts.



COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGIES CEDS SUMMARY OF REQUIREMENTS

Note: This document provides a synopsis of the requirements for comprehensive economic development strategies. For further information, interested parties are directed to section 302 of the Public Works and Economic Development Act of 1965 (42 U.S.C. § 3162) and EDA's regulations at 13 C.F.R. part 303. The document is intended to serve as a convenient source for requirements relating to the CEDS. Nothing in this document is intended to supersede or otherwise modify EDA's statute, regulations, policies or procedures.

Introduction: A comprehensive economic development strategy (CEDS) is designed to bring together the public and private sectors in the creation of an economic roadmap to diversify and strengthen regional economies. The CEDS should analyze the regional economy and 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. A CEDS integrates a region's human and physical capital planning in the service of economic development. Integrated economic development planning provides the flexibility to adapt to global economic conditions and fully utilize the region's unique advantages to maximize economic opportunity for its residents by attracting the private investment that creates jobs for the region's residents. A CEDS must be the result of a continuing economic development planning process developed with broad-based and diverse public and private sector participation, and must set forth the goals and objectives necessary to solve the economic development problems of the region and clearly define the metrics of success. Finally, a CEDS provides a useful benchmark by which a regional economy can evaluate opportunities with other regions in the national economy.

Who should develop a CEDS? A Planning Organization seeking to formulate and implement a regional economic development program will benefit from developing a CEDS. Successful economic development efforts are based on CEDS that provide an economic roadmap to diversify and strengthen regional economies. The Public Works and Economic Development Act of 1965, as amended (PWEDA), requires a CEDS in order to apply for investment assistance under EDA's Public Works or Economic Adjustment Assistance Programs. At EDA's discretion, EDA may accept CEDS that it has funded or CEDS prepared independently of EDA investment assistance or oversight.

The following sections set out below on "Planning Organizations" and "Strategy Committees" cover the requirements for EDA-funded CEDS, while the remainder of this document pertains to technical requirements for CEDS. *It should be noted that in determining the acceptability of a CEDS prepared independently of EDA investment assistance or oversight for projects under 13 C.F.R. parts 305 or 307, EDA may in its discretion determine that the CEDS is acceptable without it fulfilling every requirement set out in 13 C.F.R. § 303.7. In doing so, EDA shall consider the circumstances surrounding the application for investment assistance, including emergencies or natural disasters, and the fulfillment of the requirements of Section 302 of PWEDA.*

A. EDA-funded CEDS

Pursuant to 13 C.F.R. § 303.6, if EDA awards Investment Assistance to a Planning Organization to develop, revise, or replace a CEDS, the Planning Organization must follow the procedures set forth in paragraphs A.1 and A.2.

1. Planning Organization: A Planning Organization (as defined in 13 C.F.R. § 303.2), typically an Economic Development District (EDD) or Indian Tribe, may be eligible for EDA planning investment assistance. The purpose of such assistance is to develop a CEDS for a specific EDA-approved region. The Planning Organization is responsible for:

- Appointing a Strategy Committee (CEDS Committee);
- Developing and submitting to EDA a CEDS that complies with 13 C.F.R. § 303.7;
- Making a new or revised CEDS available for review and comment by the public for a period of at least thirty (30) days prior to submission of the CEDS to EDA;
- Obtaining approval of the CEDS from EDA;
- After obtaining approval of the CEDS, submitting to EDA an updated CEDS performance report annually. The performance report, in addition to reporting progress on CEDS implementation, should also discuss community and private sector participation in the CEDS effort. Any performance report that results in a change in the technical components of the EDA-approved CEDS must be available for review and comment by the public for a period of at least thirty (30) days prior to submission of the performance report to EDA;
- Submitting a copy of the CEDS to any Regional Commission if any part of the EDA-approved EDD region is covered by that Commission;
- Submitting a new CEDS to EDA at least every five (5) years, unless EDA or the Planning Organization determines that a new CEDS is required earlier due to changed circumstances.

2. Strategy Committee: The Strategy Committee is the entity identified by the Planning Organization as responsible for developing, revising, or replacing the CEDS. The Strategy Committee must represent the main economic interests of the region, and must include Private Sector Representatives (defined in 13 C.F.R. § 300.3, with respect to any for-profit enterprise, as any senior management official or executive holding a key decision making position, or that person's designee) as a majority of its membership. In addition, the Planning Organization should ensure that the Strategy Committee also includes:

- Public officials;
- Community leaders;
- Representatives of workforce development boards;
- Representatives of institutions of higher education;
- Minority and labor groups; and
- Private individuals.

Strategy Committees representing Indian Tribes or States may vary.

Pursuant to 13 C.F.R. § 303.7, a Planning Organization must include the following information in a CEDS submitted to EDA.--

1. Background: The CEDS must contain a background of the economic development situation of the region that paints a realistic picture of the current condition of the region. This background must include a discussion of the economy, population, geography, workforce development and use, transportation access, resources, environment, and other pertinent information.

2. Analysis of Economic Development Problems and Opportunities: The CEDS must include an in-depth analysis of the economic development problems and opportunities that identifies strengths and weaknesses in the regional makeup of human and economic assets, and problems and opportunities posed by external and internal forces affecting the regional economy. This analysis must:

- Incorporate relevant material from other government-sponsored or supported plans and demonstrate consistency with applicable State and local workforce investment strategies.
- Identify past, present, and projected future economic development investments in the region.
- Identify and analyze economic clusters within the region.

3. CEDS Goals and Objectives -- Defining Regional Expectations: The CEDS must contain a section setting forth goals and objectives necessary to solve the economic problems, or capitalize on the resources, of the region. Any strategic project, program, or activity identified in the CEDS should work to fulfill these goals and objectives.

- Goals are broad, primary regional expectations.
- Objectives are more specific than goals, clearly measurable, and stated in realistic terms considering what can be accomplished over the five (5) year time frame of the CEDS.

4. Community and Private Sector Participation: The CEDS must include a section discussing the relationship between the community in general and the private sector in the development and implementation of the CEDS. Public and private sector partnerships are critical to the implementation of the CEDS.

5. Strategic Projects, Programs and Activities: The CEDS must contain a section which identifies regional projects, programs and activities designed to implement the Goals and Objectives of the CEDS. This section should identify and describe:

Suggested Projects-

- All suggested projects, programs and activities and the projected number of jobs to be created as a result.
- Lead organizations responsibilities for execution of the projects.

Vital Projects- A prioritization of vital projects, programs, and activities that address the region's greatest needs or that will best enhance the region's competitiveness, including sources of funding for past and potential future investments. These can be overarching "themes" for regional economic development success and is expected to include components. Funding sources should not be limited to EDA programs.

6. CEDS Plan of Action: The plan of action, as described in the CEDS, implements the goals and objectives of the CEDS in a manner that-

- Promotes economic development and opportunity;
- Fosters effective transportation access;
- Enhances and protects the environment;
- Maximizes effective development and use of the workforce consistent with any applicable State or local workforce investment strategy;
- Promotes the use of technology in economic development, including access to high-speed telecommunications;
- Balances resources through sound management of physical development; and
- Obtains and utilizes adequate funds and other resources.

The CEDS must also contain a section that discusses the methodology for cooperating and integrating the CEDS with a State's economic development priorities.

7. Performance Measures: The CEDS must contain a section that lists the performance measures used to evaluate the Planning Organization's successful development and implementation of the CEDS, including but not limited to the:

- Number of jobs created after implementation of the CEDS;
- Number and types of investments undertaken in the region;
- Number of jobs retained in the region;
- Amount of private sector investment in the region after implementation of the CEDS; and
- Changes in the economic environment of the region.

These are not meant to be the only performance measures for the CEDS. Most Planning Organizations developing a CEDS will benefit from developing additional quantitative and qualitative measures that will allow them to evaluate progress toward achieving the goals identified as important in their regions.