



COLUMBIA PACIFIC
ECONOMIC DEVELOPMENT DISTRICT

**Comprehensive Economic
Development Strategy**
2022 – 2027

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INTRODUCTION

TO COLPAC EDD

The Columbia Pacific Economic Development District (ColPac), founded by community leaders in 1994, serves Columbia, Clatsop, Tillamook, and western Washington counties, and enjoys a federal Economic Development Agency (EDA) designation. Economic Development Districts help lead the locally based, regionally driven economic development planning process that leverages the involvement of the public, private and non-profit sectors to establish a strategic blueprint (i.e., an economic development roadmap) for regional collaboration. Moreover, one of the key responsibilities of an economic development district is to create and deploy a Comprehensive Economic Development Strategy (CEDS) in concert with a wide variety of diverse community partners.

Our collaboration is a natural one—our counties have abundant natural resources, connect to the greater Portland metropolitan area as a destination for visitors and market for local fish and food production, have similar climates, related workforce, housing and economic development challenges and opportunities. The region is accustomed to working together, having decades of cooperative activity on managing state forests, transportation, and water resources.

This regional on-the-ground planning process is designed to build capacity, determine and leverage key areas of development, and guide the economic prosperity and resiliency of a region. It is also a vehicle for individuals, organizations, local governments, institutions of learning, and private industry to engage in a meaningful conversation about what capacity building efforts would best serve economic development in the region.

The CEDS establishes a strategic blueprint for regional collaboration and serves as a key component in establishing and maintaining a robust economic ecosystem by helping to build regional capacity that contributes to individual, business, and community success. In addition, the EDA and other federal grant applications often require project alignment with CEDS.





Photo courtesy of Oregon Coast Visitors Association

How The CEDS Is Developed

The NW Oregon CEDS is a flexible and dynamic planning document that is updated annually, with a full economic review every five years. Drafting of the CEDS is a collaborative effort, with input through public meetings with the region's public partners and private stakeholders. The 2022-2027 CEDS includes a full regional economic analysis, updated with the most current census, employment, and business trending data. Another key addition in this update is the inclusion of the NW Oregon Regional Solutions Team mission and priorities, which mirror those of ColPac's, while providing direct connections to the region's state agencies.

Listening sessions with community leaders and stakeholders were held in Clatsop, Columbia, Tillamook and western Washington counties in April and May 2022. A Steering Committee made up of elected officials, non-profit executives, port directors, and regional economic development agencies met to review vision and goals and provide a diverse perspective on how to achieve these goals. Additional public meetings were held with the ColPac Board to review current economic and demographic data, and to refine NW Oregon's vision,

mission, and key strategic priorities. Oregon's Regional Solutions Team provided further refinement and input into the development of the 2022–2027 CEDS.

The strategy was also open for public comment for 30 days. The Steering Committee reviewed comments and addressed them, as needed, within the document.

How to Use the CEDS

This document is aimed at supporting the activities of regional, city and county economic development practitioners, community colleges, business leaders, elected officials and stakeholders implementing programs that support the growth of businesses and enhance opportunities for individuals to access economic mobility in NW Oregon.

The goal of ColPac's CEDS is to advance accessible and sustainable economic opportunities across Northwest Oregon. This requires alignment and implementation of actions across private entities, government agencies and community-based organizations. It provides a strategic, highly-informed guide to direct local and regional actions that will evolve over the next five years to meet dynamic economic and business conditions. The five-year shelf-life of the plan allows for longer term

strategizing and implementation while also enabling regional partners to leverage the CEDS in a meaningful way. The five-year strategy is constant; the actions and organizations involved in implementation will change over time.

The strategy should be used to leverage greater investment in the region by providing data and rationale that can be used to (1) obtain grants to fund implementation; and (2) align federal and states' legislative agendas to collaboratively solicit funding to support strategic projects.

Many organizations are actively working to create equitable economic growth across the region. It is important to collaborate to maximize efforts by:

- Coordinating with ColPac's network to help us understand each organization's work so it can be leveraged across the region.
- Engaging other organizations or departments within a jurisdiction to break down silos and leverage resources to the greatest extent possible and elevate one another's work.

The Roles of Public and Private Sector

Opportunities to generate wealth are primarily derived from the private market and reinforced by the public sector investing in infrastructure and land availability, maintaining community health and safety, providing sound governance, fostering an education and workforce system to build talent, and by addressing gaps in the private market regarding capital and technical assistance. The public sector has a key role in working with the private sector to ensure businesses can sustainably grow and entrepreneurs can access capital and establish innovations that enable individuals with the opportunity to improve economic mobility. Successful communities provide these fundamental needs while sustaining a proactive culture of public-private collaboration to achieve public good and to cultivate innovation within market realities.

| PUBLIC SECTOR | | PRIVATE SECTOR |
|------------------------------|---|---|
| Example organizations | <ul style="list-style-type: none"> • State, regional, county and city governments, port districts, tribal government and other public agencies. | <ul style="list-style-type: none"> • Micro and small businesses • Emerging and established locally serving businesses • Emerging and established traded sector businesses • Scalable entrepreneurs |
| Role in economic development | <ul style="list-style-type: none"> • Establish clear regulatory framework for markets • Convene stakeholders to identify future visions or plans and find solutions to challenges • Reduce barriers and encourage private development by leveraging investments in infrastructure, development-ready land, talent and skills development, public services, as well as technical and financial assistance to advance business activity and entrepreneurship | <ul style="list-style-type: none"> • Business creation and expansion • Primary generator of employment • Deployment of capital, expertise, and technology to promote economic growth • Inform and reinforce community investments that advance business expansion opportunities as well as labor and market access by providing expertise, guidance, and capital support. |

¹Greater Portland Comprehensive Economic Development Strategy, May 2021, <https://www.oregonmetro.gov/sites/default/files/2021/05/24/Comprehensive-Economic-Development-Strategy-public-review.pdf>

Regional Economic Conditions Summary

History

Northwest Oregon has been the home to the Chinook and Salish peoples for thousands of years. While this area is home to the oldest settlements West of the Rockies, it also encompasses history predating the arrival of European explorers as a trading center.

In 1792, American explorer Robert Gray became the first European American to navigate the Columbia River, trading with the native tribes and exploring up to 15 miles upriver.

The Lewis and Clark Expedition, sometimes described as the area's first tourists, arrived in 1805. The expedition originally camped on the north side of the Columbia River, in a storm-wracked area. Due to lack of food and insufficient resources to purchase enough food from neighboring tribes the party voted to move their camp to the south side of the Columbia River near modern Astoria, Oregon.¹ Sacagawea, and Clark's slave York, were both allowed to participate in the vote, so this may have been the first time in American history where a woman and a slave were allowed to vote in an election run by European immigrants.²

For nearly 200 years the area fished and logged to prosperity until the mid 1970-1990's when these natural resource industries collapsed due to over extraction and new environmental regulations. Rural communities, including those now encompassed by the ColPac district were devastated as swaths of family wage jobs were wiped out. Beginning in the early 90s, and hitting a stride in the early 2000s, investment in tourism heralded economic recoveries and downtown revitalization efforts in several communities.

Geography

The Columbia Pacific Economic Development District includes Columbia, Clatsop, Tillamook, and Western Washington Counties accounting for about 5% of Oregon's total land mass. The district is bound on the north by the Columbia River and on the West by the Pacific Ocean. The area features several smaller rivers and the Oregon Coastal Range.

ColPac EDD's region borders a cumulative of 200 miles along the Columbia River and Pacific Ocean. The region is considered evenly split between urban and rural populations, but the population density reflects a significantly distinct and concentrated urban jurisdiction, surrounded by largely rural landscape and economy. The population of approximately 161,200 (4% of Oregon's total population) is primarily concentrated in communities of less than 10,000.

Its proximity to the Portland metro area, results in significant visitation as well as economic synergies. Highways 30, 26, 6, and US 101 connect the Northwest region to the greater I-5 corridor and all along the west coast. Oregon's North Coast area is well known for its recreational and historic tourism activities, drawing thousands of domestic and international visitors to the region. The district covers roughly 5,000 square miles, with over 500 miles of waterways.

Regional Characteristics

Nestled at the apex of two major waterways, the ColPac region has strong ties to both domestic and international markets. The maritime landscape of the region has long defined the Northwest region, dating back to the original caretakers of the land and waterways, the Chinook, Clatsop-Nehalem, Clatskanie, and Tillamook Tribes. Now, the ColPac region has developed a highly complex and productive "Blue Economy" that includes top-tier research, expansive port operations, high-capacity fishing and seafood processing, and maritime trades which are employed locally as well as exported globally.

²History & Culture - Lewis and Clark National Historical Park (U.S. National Park Service)

³Clark & Edmonds, 1983 pp.51-52



Fishing, Forestry & Tourism: Economic Foundations

Despite notoriously unforgiving waters, fishing and seafood processing put Northwest Oregon on the map. Astoria, in particular, enjoyed its position as a fishing and canning empire starting in the 1870s and well into the 1950's. In 1945, roughly 30 canneries operated along the Columbia River.³ This empire was built largely by the employment of seasonal and immigrant workers, a source of labor that exists in virtually all large-scale manufacturing and agricultural work to this day.⁴ However, excessive fishing, the installation of dams, and the establishment of offshore operations caused the cannery boom to dwindle at the close of the 20th century. Bumble Bee's final Astoria cannery closure in 1980 led to the loss of hundreds of local jobs. Logging and fishing remain as mainstays of the North Coast economy, but in the form of mechanized seafood processing, recreational fishing, and more automated timber operations, resulting in fewer per capita jobs in these industries.

The current fishing industry in the ColPac region operates in both the commercial and recreational realm. Over the years, recreational fishing has shared an increasing portion of the fishing market and resulting economic activities, driving the economic impact of the tourism economy in the region. There are several ways in which people can enjoy crabbing and fishing activities, whether using the public or private marine infrastructure to operate their private watercraft or enjoying the business services of ocean outfitters, ports, and marinas. Both the Port of Astoria and the Port of Garibaldi have infrastructure (Boardwalk and fishing piers, bait shops) to support fishing activity and offer opportunities to buy fish from local fisherman (via either fish markets or at the dock).⁵

Across all of Oregon's commercial fishery operations Clatsop County ranked second in number of those employed at roughly 270 workers in 2021. Tillamook County reported a total 160 workers in the industry. Collectively, the ColPac region was the most dominant in the employment of those in the Commercial Fishing industry. The prevalence of Dungeness crab along this North Coast is a strong economic driver of commercial landings as well as recreational fishing opportunities.



Fish processing coincides with the larger fishing market, establishing an additional high value-add industry within the region's fishing economic activity. Over a dozen businesses in the ColPac region offer seafood processing services that fulfill direct to consumer, wholesale, domestic, and international markets. Current innovation regional initiatives are being undertaken to advance seafood processing opportunities, including the Tillamook Innovation Hub orchestrated by the partnership between the Port of Tillamook and the Tillamook Coast Visitors Association.

In 2019, the Oregon Employment Department released a report on the status of the maritime industry, noting that "no single source of data can fully measure employment in Oregon's maritime sector [where] measuring employment in the sector requires data from multiple sources."⁶ The sector encompasses the fishing, maritime manufacturing, and maritime transportation industries with jobs including, but not limited to, ship and boat building, fishing, support activities for water transportation, seafood product preparation and packaging, fish and seafood merchant wholesalers, boat dealers, scenic and sightseeing transportation (water), deep sea, coastal, and great lakes water transportation, marinas, fish and seafood

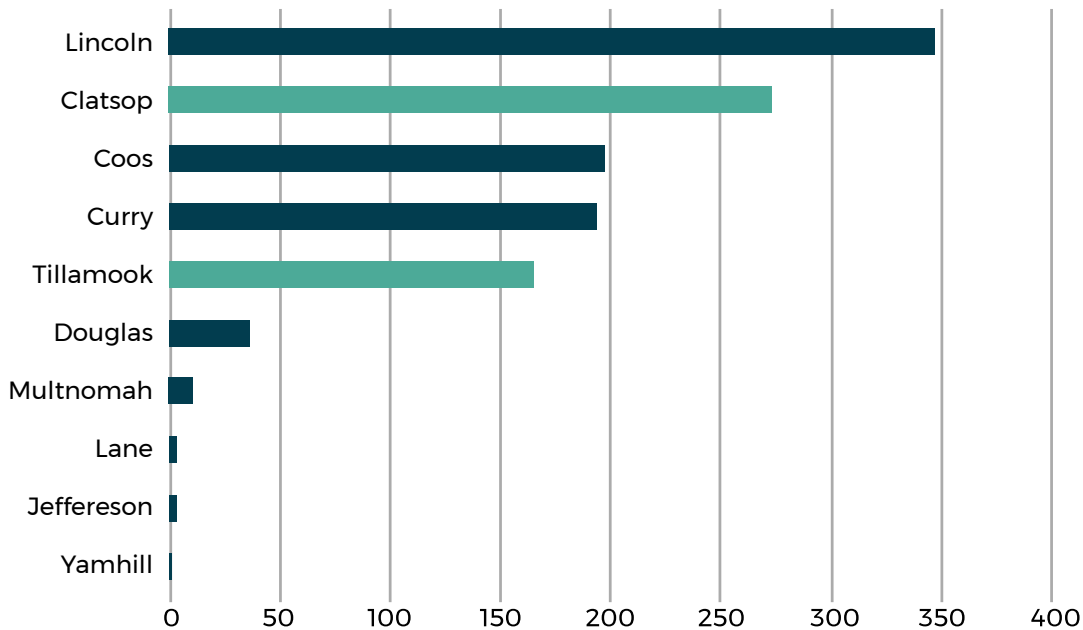
⁴ "Astoria History." CruisePortInsider.com - Astoria History, www.cruiseportinsider.com/astoriahistory.html.

⁵ "A Look Back: Astoria's Radical Immigrant Labor Past." NwLaborPress, 2 Jan. 2020, nwlaborpress.org/2015/04/look-back-astorias-radical-immigrant-labor-past/.

⁶ "Oregon Coastal Port Report." Oregon Coast Visitors Association, 2021.

⁷ Beleiciks, Nick. "Oregon's Maritime Sector Workforce Report." Oregon Employment Department, Mar. 2019.

2021 Annual Average Non-Tribal Commercial Fishing Employment



Source: Oregon Employment Department and Oregon Fish and Wildlife

markets, inland water transportation, and animal aquaculture. The ambitions of multiple regional stakeholders in the ColPac region to define the region's wider 'Blue Economy' directly addresses this gap in data and tracking. As of 2019, 5.2 % and 2.3% of Clatsop and Tillamook County's workforce were in the maritime sector.

While traditional forestry such as timber harvesting, ports and maritime activity, light manufacturing, fishing, and food processing remain the cornerstone of Northwest Oregon's economy and history, ColPac communities are continuing to turn to skilled job development and tourism as a key to forging diversified and resilient economic development. Currently, the leisure and hospitality industry is consistently within the top five sectors by employment in all four ColPac counties, ranging from 16.4% to 25.3% of total employment, generating a

cumulative of \$827,301,138 in wages across all local, state, and private entities. Despite the significant set back for the sector as a result of the COVID-19 pandemic economic policies, the tourism industry is projected to continue to grow. In 2020, the leisure and hospitality industry employed 13,300 people and is expected to add 5,880 jobs by 2030, or a 44% growth.

Forestry activity, a once predominant industry, occupies a smaller portion of the region's economic pie. To date, 4,147 people are employed in the forestry sector in the region, amounting to \$183,498,113 in annual wages. Research released by the Oregon Employment Department in the Spring of 2020 revealed that there is an expected continued loss of jobs in the mining and logging industry and in wood product manufacturing, most likely a result of ongoing improvements in labor-saving technology and



Photo courtesy of Oregon Coast Visitors Association

mill modernization. However, timber industry receipts are often an important stream of income for counties and cities that direct their share towards public budgetary items including education. In Clatsop County, historically almost 30% of the County's economic base is tied to the forestry/wood products sector. While employment by forestry takes up an increasingly smaller share in the Clatsop County labor force, wages are highly competitive at an average of \$70,599 annually – 20% greater than the county median household income.⁷

The modern economic foundations of the region were first laid by the timber and fishing industry. While the forest product industry and seafood processing remain core industries in the region, leisure and hospitality, recreation activities, agriculture, and manufacturing have become key industry clusters in the region.

ColPac's Economic Cluster Profile

An overarching review of the dominant economic sectors within the ColPac Region reveals what are defined as Economic Clusters – “geographic concentrations of industries related by knowledge, skills, inputs, demand, and/or other linkages.”⁸ The development and existence of clusters within a region have been observed to spur job

creation, innovation, and a stronger entrepreneurial environment. Inherent in the presence of a cluster in a region's competitive specialization in the cluster industry. The U.S. Cluster Mapping project found the following dominant traded clusters for the region.

Hospitality and Tourism; Fishing and Fishing Products; Forestry; Wood Products; Communications Equipment and Services; Food Processing and Manufacturing; Livestock Processing; Construction Products and Services; and Recreational and Small Electric Goods.

Socioeconomic Data

2020 Total Population: 158,246

2020 Labor Force Population vs Labor Force
60% work-age population

59% labor force participation rate

7% Unemployment rate (seasonally adjusted)

⁸ Clatsop Economic Development Resources. "Astoria-Warrenton Chamber of Commerce CEDR Presentation." Quality Info, Oregon Employment Department, 2021, www.qualityinfo.org/documents/10182/79531/042622+-+Astoria-Warrenton+Chamber+of+Commerce+CEDR+Presentation?version=1.0.

⁹ Mercedes Delgado & Michael E. Porter & Scott Stern, 2016. "Defining clusters of related industries," *Journal of Economic Geography*, vol 16(1), pages 1-38.



Race and Ethnicity

The NW Oregon region has a limited race/ethnic diversity profile, with 80% of residents identifying as white-only. While the Hispanic population comprises 16% of the region's population, Cornelius and Forest Grove show that 52.5% and 23.1% of their residents identify as Hispanic or Latino, respectively. These communities, and the NW region overall, have a growing Hispanic population.



Veteran Status

The greatest share of Northwest Oregon's veteran population resides in Columbia County at 16.6% of the population. Apart from Washington County, all other ColPac counties have a greater proportion of Veteran populations when compared to Oregon overall, which ranks at 8.3%.



Population Growth

In Oregon overall, as is the case with the North Coast region counties, natural births are declining, while the migration rate, which often compensates for that loss of natural growth, is no longer sustaining growth rates. 12,700 new residents are anticipated to be moving into the region by 2030, representing a population increase of 8%.



Age Composition

The strength of a region's economic base is closely correlated with the size of their labor force base, measured by the numbers of residents in the typical working age range. For many rural communities in Oregon, there is frequently a disproportionate number of seniors that have exited the labor force. The ability for a local economy to attract, retain, and evolve talent and relevant industry must be supported by a base of "working-age" residents. The "working age" (defined most consistently as 16 – 64 years old) population across the region ranges from 55 – 63%, with those in the civilian labor force aligning with that proportion, indicating that those who are of working age of largely employed in their community.



Broadband Access

In an environment of increasingly remote work, there are certain bandwidth levels required to participate in video calls and stream video content. Local data estimates 18.2% of Clatsop residents surveyed have download speeds of less than 10 Mbps. In Columbia and Tillamook County, an even greater share of the population with download speed of less than 10 Mbps, ranking at 22.3% and 28.5% of the population, respectively.



Educational Attainment

The majority of the ColPac region mirrors other rural areas with roughly a quarter of population of 25 years and older having bachelor's degrees or higher, although ranking behind the nationwide and state percentage of 33%. Washington County surpasses the state and national ranking with 45% of its population of 25 years and older having a bachelor's degree or higher. Given that 4 out of 5 of the dominant industries in ColPac counties do not require a 4-year degree we might expect that ratio. The regional workforce is equipped with alternative trades-based education and certification.



Average Commute Distance

The average commuting distance in each county is highly distinct based on the employment and housing opportunities unique to the community's local economy. In Clatsop and Tillamook Counties, residents' commute is bifurcated between needing to drive 10 or less miles or 50 or more miles. Conversely, the commuting patterns in Columbia and Washington County are more uniform, with 36.1% of residents traveling 10 to 24 miles to work in Columbia County while 65% of Washington County residents travel 10 miles or less to get to work.



Transportation

NW Oregon has a multi-modal transportation system to support economic development. The region has a well-developed highway system that follows logical, well-defined corridors, with three major routes connecting to the Portland metropolitan area. The proximity to Portland means access to rail and airport facilities for much of the region. Local airports in Astoria, Scappoose and Tillamook are available for general aviation. Industrial and transportation opportunities are available at each of the airports.



Ports

NW Oregon also has deep-water draft ports in Astoria, Clatskanie, and St Helens, and commercial fishing access at the Port of Garibaldi, Port of Astoria, and marinas along the Nehalem and Columbia Rivers. Freight grade rail transportation is available between Clatskanie and Portland.



Household Income

In 2020, the regional average of median household income was \$66,632, just above the Oregon median household income of \$65,667. Per capita income, however, averaged about \$33,782.



Poverty Rate

The regional poverty rate continues to slowly decline alongside the state level. Clatsop, Tillamook, and Columbia Counties have poverty rates between 9-11% of the population. While Washington County has a significantly lower poverty rate, below 8%, disparities exist between the rural west and tech-focused east of the county.



Housing

Across most of the region, residential building (as measured by HUD housing permitting data) slowed from 2019 to 2021, apart from Columbia County that saw a 45% increase in housing permits from 2020 - 2021, consisting of single-family homes and a large portion of multi-family homes. While most of the region saw a slowing down of housing development, the housing prices experienced a considerable ascent, with the median housing price for Clatsop, Columbia, Tillamook, and Washington County rising between 10% and 25% during 2021 to 2022.

Vision

Working together, we envision a NW Oregon that is an active, innovative, and well-supported business development region, with thriving communities, expansive recreation opportunities, and diverse urban and rural amenities.

Principal characteristics of NW Oregon include attainable family wage jobs; diverse business and employment opportunities, and support for new business development, against the backdrop of strong communities, excellent education systems, reliable infrastructure, and an abundance of recreation opportunities.

Strategy Foundation

The CEDS purpose is to provide commonly defined goals and strategy to move the region in a unified direction. We have defined three core pillars of work to diversify, grow, and strengthen the economy in NW Oregon. We consider education a fourth foundation pillar to a successful economy. In Economic Development, the focus tends to be at the workforce level, but we must recognize the vital role K-12 and auxiliary education plays. With an educated workforce, we can focus on:

- **Adequate, Modernized Infrastructure**

Our region boasts remarkable natural resources, sophisticated manufacturing facilities, and nationally recognized brands. We envision a region with roads, rails, ports, and technology to bolster these inherent assets providing a strong, reliable foundation for business operations. Focus areas include water, wastewater, stormwater, traditional and multi-modal transportation, communications, and broadband.

- **Housing**

An equitable and prosperous future in our region depends on allowing the market to respond to the high demand for new housing units at every level from affordable, to missing middle and family properties across price points.

Unlocking home-building across our region will help our businesses stabilize operations and implement growth plans. Established and start-up businesses of all sizes face labor shortages that could be resolved with focused recruitment if attainable housing is available.

- **Collaboration**

Successful alliances and partnerships for coordinating and collaborating on regional economic development are rooted in our region. Working partnerships across our region have returned major investments to our area and we recognize the hard work of individuals, organizations, and communities.

However, feedback from our partners indicate that experiences of incivility, hostility, and coordinated disruptions have resulted in loss of legacy and new staff, time-cost of irrelevant side quests, and difficulty recruiting volunteers to municipal boards.

In order to successfully advocate NW Oregon's interests to state, federal and other entities we must forge community across interest groups and rebuild trust in our institutions across the region.



Goals And Strategies

Fundamentally, the region must ensure that we have adequate, sustainable infrastructure as well as successful, efficient leadership and adequate housing to unleash growth potential in the region.

As the region strives to attain these aspirations, there are several related goals that support economic development, resiliency, and diversity in our region. Detailed strategies are outlined in the Implementation and Evaluation Matrix.

Goal 1: Adequate, Modernized Infrastructure

The region's infrastructure: our roads, bridges, other transportation assets, sewer systems, water supply, power supply and communication lines are all outdated, failing or under capacity. Much of the region's infrastructure is thirty to fifty years old and was built for different communities and economies. As infrastructure is the physical foundation of a local economy, these fixed assets are fundamental to the day-to-day functioning of economic and community activity. Aging and inadequate infrastructure is not just a NW Oregon issue: infrastructure investment in the U.S. has fallen from 4.2% of GDP in the 1930s to 1.5% of GDP in the last decade.⁹ The region's failing roads, aged and under-capacity water and wastewater systems and general lack of modern infrastructure are a reflection of this underinvestment and are making it more expensive and more difficult for the production and transportation of the goods and services that underpin the health and well-being of thriving communities.

While Business Oregon is working to compile an inventory of infrastructure needs, ColPac is working to identify, assess and challenge the dynamics that are impacting the region's ability to develop and fund adequate and modernized infrastructure. The intention for our research and analysis of the region's infrastructure is to provide leaders of community, businesses, jurisdictions and state and federal partners with tools to better understand where we've been, how we got where we are and potential viable options to solve some our ongoing challenges.

Much of the region's infrastructure is thirty to fifty years old and was built for different communities and economies.

| STRATEGY | ACTIONS | METRICS | LEADERSHIP |
|--|--|---|---|
| <p>Strategy 1.1</p> <p>Gain understanding of current infrastructure conditions and insufficiencies</p> | <p>Monitor Business Oregon's work to compile an infrastructure inventory</p> <p>Complete assessment of obstacles to addressing infrastructure shortcomings</p> <p>Create implementation plan for strategies to address infrastructure needs</p> | <p>Completed plans</p> <p>Funded projects</p> <p>Completed projects</p> | <p>Business Oregon</p> <p>ColPac EDD</p> <p>Ports</p> <p>ODOT</p> |
| <p>Strategy 1.2</p> <p>Support funding and implementation of regionally impactful projects</p> | <p>Update the Regionally Significant Transportation Projects list annually</p> <p>Leverage funding from a variety of agencies/sources including federal and state agencies</p> <p>Encourage a broad level of support for specific projects</p> <p>Liaise with Business Oregon for the Ports Economic Impact Assessment</p> | <p>Updated Regionally Significant Transportation Project List</p> <p>Successful grant applications</p> <p>Funded Projects</p> | <p>Leads: Individual Project Managers</p> <p>Partners: ColPac, Ports, County-based economic development organizations, city and county partners</p> |
| <p>Strategy 1.3</p> <p>Support and promote the advancement of technologies in broadband internet, energy sector, and maritime industries (Blue Economy)</p> | <p>Continue leading the multi-county Broadband Action Team</p> <p>Work with ISP for middle mile connectivity to rural areas</p> <p>Assist communities with last mile projects including funding applications</p> <p>Maintain awareness of upcoming opportunities</p> <p>Track development of new technologies and disseminate information to potential stakeholders</p> <p>Support Blue Economy industry recognition and coalition</p> | <p>Miles of middle mile fiber installed</p> <p>Responsive programs at Community Colleges addressing emerging technologies</p> <p>Number of technology-driven projects</p> | <p>Leads: Individual Project Managers</p> <p>Partners: ColPac, Ports, County-based economic development, city and county partners, community colleges</p> |
| <p>Strategy 1.4</p> <p>Promote resilient infrastructure across the region</p> | <p>Work with NW Oregon entities to support implementation of Hazard Mitigation Plans and strategies in each county and city.</p> <p>Disseminate emergency management plans to regional audience</p> | <p>Newsletters including info on current regional resilience plans and resources</p> <p>Projects to retrofit infrastructure or mitigate damages from disasters</p> | <p>Lead: County Emergency Management</p> <p>Partners: Cities, counties, community colleges, small business technical support providers</p> |

¹⁰ State and local governments are spending more on infrastructure at 1.4% of GDP, accounting for 93% of total funding, relative to the federal government which is spending less than 0.1% of GDP or 7% of total funding. Sources: Stupak, Jeffrey M. "Economic Impact of Infrastructure Investment." Congressional Research Service (2018). <https://crsreports.congress.gov/product/pdf/R/R44896> and McNichol, Elizabeth. "It's Time for States to Invest in Infrastructure." Center on Budget and Policy Priorities (2019). <https://www.cbpp.org/sites/default/files/atoms/files/2-23-16sfp.pdf>

Goal 2: Effective Collaboration

As a rural district with most cities housing fewer than 10,000 residents, regional collaboration for economic development is critical. We aim to ensure a high level of proactive economic development coordination, cooperation, and communication among NW Oregon organizations and leaders.

Our SWOT analysis workshop indicated an existing culture of collaboration as a regional strength. This foundation is an opportunity to build out our networks in an effort to maintain services, advocacy, and support for all individuals in an accessible, inclusive manner. Active collaboration can help the region meet the three prior goals noted in the CEDS: a strong and diverse business environment, a robust workforce, and modernized infrastructure. To be successful, it's foundational that preconceptions are acknowledged and set aside as we embark on work to benefit all the residents of NW Oregon.

Despite a largely homogenous, largely white population, ColPac recognizes the importance of diversity, equity, and inclusion in our region. Across the region there is a range of political ideologies and recently, social upheaval has affected small business operations due to protests on sidewalks and harassment, for example.

After 25 years of successful collaboration with economic development partners, municipalities, ports, and the public, each organization is facing a new reality of social dynamics. To be effective, we must continue to draw on these institutional relationships and welcome new perspectives. Communities that cannot integrate newcomers cannot thrive, and institutions and individuals must recognize the validity of lived-experiences, differing outcomes, and a diversity of cultures and lifestyles.

Underlying the need to be inclusive is the requirement to be respectful. As communities large and small have grappled with the pandemic, racism, violence, and growing inequality folks have turned their anger towards institutions like local governments, schools, and community organizations. The outcome of growing distrust is shown through incivility and aggression during public processes. Unfortunately, the consequence of these actions has not improved conditions and sunk costs into irrelevant sidequests, caused employee turnover from legacy staff to new hires, and even reaches into recruiting for sports coaches effectively affecting every level of governance and community. To regain a sense of camaraderie, common goals, and mutual respect our communities must share open, courteous dialogue, offer meaningful public processes, and work together to bring about positive outcomes.

With effective collaboration we can succeed in advocating NW Oregon's interests to state, federal and other entities having an impact on the region's economic development. To be effective in a highly competitive funding environment, the region must garner consensus on regionally impactful projects. NW Oregon has been successful in acquiring funding for large-scale projects when stakeholders and elected officials rally together to provide significant investment in the area. It is our goal to continue a culture of collaboration and region-wide consensus building.

| STRATEGY | ACTIONS | METRICS | LEADERSHIP |
|--|--|--|---|
| <p>Strategy 2.1</p> <p>Coordinate NW Oregon and other entities to identify, plan and implement priority projects</p> | <p>Actively participate in economic development forums</p> <p>Convene regional stakeholders as timely topics arise</p> <p>Coordinate similar type projects across the region to create economies of scale for planning, buying and contracting</p> <p>Identify federal funding opportunities for regionally significant projects</p> | <p>Recorded institutional knowledge resulting from forum participation</p> <p>Maintain grants database available for partner use</p> | <p>Key Partners: local economic development councils, ports, cities, counties, private institutions and state and federal agencies including EDA, USDA, and EPA.</p> |
| <p>Strategy 2.2</p> <p>Enhance local economic development service delivery capacity</p> | <p>Provide grant administration services for municipalities</p> <p>Provide grant coordination and writing services</p> <p>Conduct research and assessments to support funding or implementation of projects</p> | <p>Number of grants awarded</p> <p>Number of grants administered</p> <p>Studies and papers completed</p> <p>Distribution reach of completed reports</p> <p>Number of partners served</p> | <p>Lead: ColPac</p> <p>Key Partners: CET, CEDR, TCEDC, Ports of Tillamook Bay, Garibaldi, Astoria, Columbia County</p> |
| <p>Strategy 2.3</p> <p>Support and promote the advancement of technologies in broadband internet, energy sector, and maritime industries (Blue Economy)</p> | <p>Disseminate information at the regional level on behalf of our partners</p> <p>Facilitate coordination between agencies and regional partners</p> <p>Convene conversations on timely topics for regional coordination</p> <p>Engage with state and federal officials and agencies to advocate for priority projects</p> | <p>Newsletters publication and engagement</p> <p>Social Media Presence Bi-Monthly Regional Meetings</p> | <p>Lead: ColPac</p> <p>Key partners: county-based economic development organizations, city and county partners, emergency planning professionals, ODOT, Business Oregon, Regional Solutions, and other regional stakeholders.</p> |

To regain a sense of camaraderie, common goals, and mutual respect our communities must share open, courteous dialogue, offer meaningful public processes, and work together to bring about positive outcomes.

Goal 3: Strengthen & Diversify NW Oregon Businesses

Northwest Oregon's existing businesses face challenges on many fronts including: the global pandemic and worldwide repercussions of conflict, local natural disasters on small and large scales, changing technologies, a resulting volatile labor force landscape, and the challenges of increased costs and regulations. The same factors challenging businesses across the country are acutely felt in more remote areas, where delays in the supply chain are heightened and recruitment efforts more strained than in cities where economic resources are more readily at hand.

However, during the last few tumultuous years an existing housing shortage became a full-blown crisis. Currently, the key to unlocking the growth and diversification of our regional economy is the lack of housing at every income level. Interviews with the private sector revealed that even individuals earning two to the three times AMI cannot find housing due to lack of inventory. Unsurprisingly, as hospitality workers responded to months of uncertain/non-existent wage prospects, they shifted away from the region and their housing stock was filled with remote workers. This flip in resident employment type has created a particularly acute labor shortage for our tourism-based hospitality industry.

Every industry in the region is affected by lack of attainable housing for workers. It is our opinion that if we could unlock housing production across the region, business growth could exceed pre-pandemic levels and continue to expand in a variety of wage categories. Strengthening our existing sectors through local cluster development, expert mentorship during expansions, access to capital, robust talent development pipelines and strong networks will lay the foundation for a prosperous, resilient, and inclusive economy.

Currently, the key to unlocking the growth and diversification of our regional economy is the lack of housing at every income level.



| STRATEGY | ACTIONS | METRICS | LEADERSHIP |
|--|--|---|---|
| <p>Strategy 3.1</p> <p>Improve Access to Capital and Facilitate Investment in existing and new capital assets</p> | <p>Continue to provide small business loans for capital assets</p> <p>Support credit building program for populations outside of traditional financing</p> <p>Expand loan program to provide gap financing</p> <p>Buildout a regional brownfield rehabilitation program with grants and loans</p> <p>Investigate and stand-up a local equity investment fund</p> | <p>Number of loans made</p> <p>Amount loaned</p> <p>Acres of assessed land</p> <p>Acres of land with No Further Action letters from DEQ</p> <p>Creation of new equity investment fund</p> | <p>Lead: ColPac</p> <p>Key Partners: EPA, Counties, ColPac, OBDD, DEQ, KIVA, EDA,</p> |
| <p>Strategy 3.2</p> <p>Support Innovation and Cluster Development</p> | <p>Identify opportunities to network or “cluster” businesses for specific business development activity</p> <p>Support high-growth and/or high-impact clusters by supporting expert mentor networks</p> <p>Instigate Talent Development opportunities by cataloguing CTE programs for possible replication across the region</p> | <p>Number of mentors engaged</p> <p>Number of industry specific networking opportunities in the region</p> <p>Number of individuals completing job training programs</p> | <p>Lead: ColPac</p> <p>Key Partners: NW Oregon Works, county-based economic development orgs, Ports, Private Sector</p> |
| <p>Strategy 3.3</p> <p>Support the regional local community and business programs</p> | <p>Support Main Street programs</p> <p>Support local Chamber initiatives</p> <p>Liaise with local communities about program opportunities</p> | <p>Number of active Main Street organization and their advancements within the program.</p> <p>Number of active Chambers of Commerce</p> | <p>Partners: Main Street organizations, Chambers of Commerce, ColPac</p> |
| <p>Strategy 3.4</p> <p>Support county-based economic development organizations</p> | <p>Seeking input from CEDR, CET, TCEDC</p> | <p>Number of clients served</p> <p>Projects funded and implemented</p> | <p>Key Partners: CET, CEDR, TCEDC</p> |

Goal 4: Resiliency

Not a stranger to economic downturns or significant natural disasters, NW Oregon has created networks for disaster response as well as plans to implement at those times. When traditional natural resource-based industries began to decline, local industry invested in new technologies to reach new markets. Major weather events resulting in catastrophic flooding and storm damage have resulted in the development of rapid response emergency protocols and new resiliency in infrastructure. By necessity, economic resilience is foundational to the NW Oregon's CEDS, and a basic tenet to the region's planning and project implementation.

Adapting a mindset of planning for adverse events as a course of action is the key to moving the needle on ensuring our region is prepared for the myriad challenges it will surely face. Our investment decisions must address ways to mitigate, adapt and plan for extreme weather, natural and human-caused disasters.

NW Oregon has long struggled against the elements in its location at the edge of the continent, communities have met those challenges with 'sisu', a Finnish concept described as stoic determination, tenacity of purpose, grit, bravery, resilience, and hardiness. Beginning in 2020, the pandemic health emergency, social movements, and world-wide economic disruptions have fractured relationships and created mistrust in institutions. The foundation of resilient economies is resilient people and we must tie our collaboration goal into our resiliency work. A resilient region is made of up dozens of resilient communities, that know one another, know the plan, and know how to work together to execute the plan.

The foundation of resilient economies is resilient people and we must tie our collaboration goal into our resiliency work.



Photo courtesy of Oregon Coast Visitors Association

| STRATEGY | ACTIONS | METRICS | LEADERSHIP |
|--|--|---|---|
| <p>Strategy 4.1</p> <p>Bring together local emergency management staff to identify critical paths for coordinating services across jurisdictions.</p> | <p>Support creation and/or distribution of emergency management resources/protocol</p> <p>Facilitate meetings across jurisdictions regarding coordinate response efforts</p> | <p>Tabletop exercises</p> <p>Regular, coordinated communication</p> | <p>Lead: Emergency Management orgs</p> |
| <p>Strategy 4.2</p> <p>Identifying priority road improvements to ensure emergency response and access to employment areas by resident workers</p> | <p>NWACT Strategy discussion</p> | <p>Document outlining needs</p> | <p>Lead: NWACT</p> <p>Key Partners: Counties, Cities, utilities, community relief organizations</p> |
| <p>Strategy 4.3</p> <p>Planning for better utilization and sharing of disaster relief plans</p> | <p>Plan for better use of existing public facilities for use following a major natural disaster.</p> | <p>Strategy for better inter agency collaboration</p> | <p>Key Partners: Cities/Counties, OEM, Red Cross, FEMA</p> |

Goal 5: Workforce Development

Northwest Oregon Works and ColPac foster relationships between the private sector, community colleges, county-based economic developers, training programs, and other stakeholders to build career ladders, support internship programs, facilitate regional community college coordination and more.

NW Oregon Works has four industry focus areas: Maritime, Advanced Manufacturing, Healthcare and Hospitality. County-based economic development agencies each have responsive programs to support their specific needs. ColPac brings together all stakeholders, including the private sector, to work in concert for maximum effectiveness.

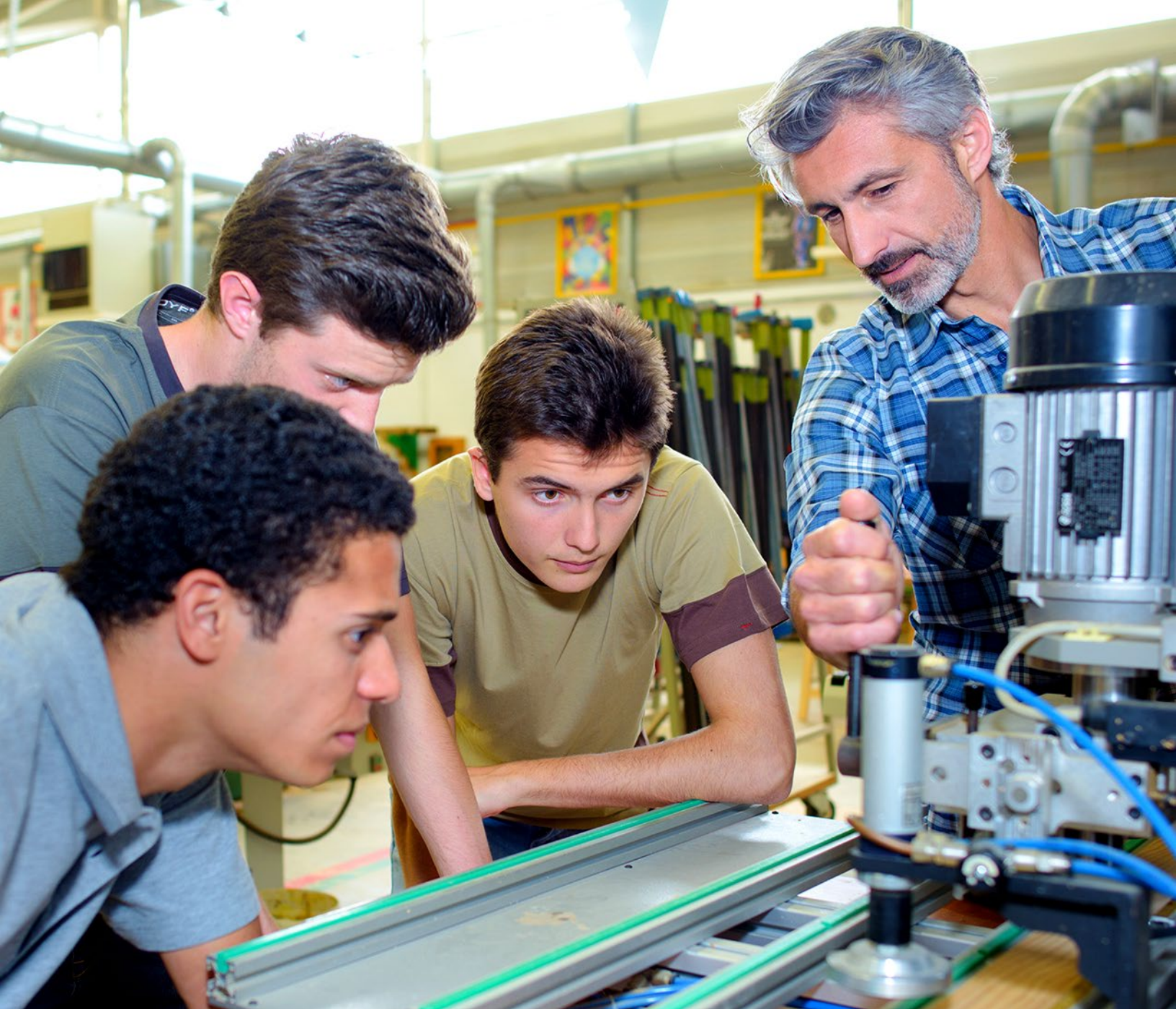
The long-term effects of investing in workforce development beginning in K-12, NW Oregon is positioned to create a culture of innovation, regenerative business practices, and career ladders that supports business diversification expansions or vertical integration across a number of industries.

While workforce development, attraction, recruitment, and retention in rural areas have innate challenges, in NW Oregon the shortage of housing units exacerbates the challenges.

Vacancy rates for long term renters and home buyers is effectively zero in many of our communities and has been for a number of years. Price pressure from technology enabled short term rental markets and second home buyers is making it difficult for businesses of all sizes and types to attract talent.

Workforce attraction to our area is heavily influenced by the age, type, and availability of housing stock across the region. This sensitivity to demographic changes is demonstrated in Tillamook County, whose population is aging faster than the rest of the region and will begin to see a greater workforce constriction in next five to ten years. In order to secure the next generation of the county's labor force , additional attainable housing must be created to address labor needs.

While workforce development, attraction, recruitment, and retention in rural areas has innate challenges, in NW Oregon the shortage of housing units exacerbates the challenges.



| STRATEGY | ACTIONS | METRICS | LEADERSHIP |
|--|--|---|---|
| <p>Strategy 5.1</p> <p>Advocate for strong, well-coordinated community college, high school, apprenticeship, and community education programs</p> | <p>Support and expand regional businesses with education-to-employer pipelines</p> <p>Seek out culturally appropriate education partners</p> | <p>Number of engaged regional employers</p> <p>Programs Funded</p> | <p>Lead: ColPac</p> <p>Key Partners: Community Colleges, non-traditional educators, unions, trade organizations, private sector</p> |
| <p>Strategy 5.2</p> <p>Support implementation of business incubation and worker training</p> | <p>Coordinate workforce development for advance manufacturing and other emerging clusters</p> | <p>Amount of funds delivered</p> <p>Number of training graduates</p> <p>Number of start-ups stabilizing</p> | <p>Lead: NWOregon Works</p> <p>Partners: OMIC, Tongue Point Job Corps, Community Colleges</p> |

Goal 6: Reliable, Efficient Transportation

Northwest Oregon must provide a safe, efficient and accessible regional transportation system to support economic vitality, resiliency, and livability of Northwest Oregon.

While market access and the mix of transportation modes available for the movement of goods and people are a distinct asset to the region, maintaining that infrastructure, and expanding it to meet growing industry and population needs, is a challenge. Issues include county/city/state road maintenance and funding, limitations to state highways, rail safety, aging bridges, aging dams and dykes, transit funding, and challenges maintaining port infrastructure.

NW Oregon priority transportation issues include:

- Rail safety including crossings, downtown and freight corridor rail improvements
- Highway and business road safety
- Dredging to maintain access to NW Oregon's ports and waterways
- Transit system upgrades, including enhancement of the Connector regional transit system
- Diking/Levee certification and restoration
- Culverts/Flood gates to allow passage of water during storm events
- Functioning ditches, wetlands and floodplains

When determining priority transportation projects for the STIP and Connect Oregon (Oregon's Multi-Modal Program), NW Oregon considers the following economic criteria: Transportation access for regionally significant industrial, local industrial and employment areas, projects that retain, leverage or complement the creation of jobs, and contribute to enhancing the region's overall transportation system. Addressing transportation safety is also critical as infrastructure ages and/or becomes outdated to meet the modern mobility demands of local communities. Finally, an increasingly important element of the regional transportation system for economic and community development is the ability to prepare for and respond to disasters.

Addressing transportation safety is also critical as infrastructure ages and/or becomes outdated to meet the modern mobility demands of local communities.



| STRATEGY | ACTIONS | METRICS | LEADERSHIP |
|--|---|--|--|
| <p>Strategy 6.1</p> <p>Provide a local public forum for information, discussion and coordination of transportation issues, projects and funding procedures affecting the region, including staffing the NW Oregon Area Commission on Transportation</p> | <p>Provide administrative services for the NWACT</p> | <p>NWACT meetings</p> <p>Successfully funded projects</p> | <p>Lead: NWACT</p> <p>Partners: CoIPac, ODOT, County Commissioners, Public Works, transit districts transportation advocates</p> |
| <p>Strategy 6.2</p> <p>Recommend state transportation investment priorities based on local transportation system plans (TSPs) and addressing identified needs in the region</p> | <p>Ensure a full roster of the NWACT</p> <p>Create agendas and bring in speakers in a responsive manner</p> | <p>Roster and attendance</p> <p>Increase public comment</p> | <p>Lead: NWACT</p> <p>Partners: ODOT, Cities, Counties, Ports</p> |
| <p>Strategy 6.3</p> <p>Advocate Northwest Oregon transportation issues to neighboring regions, other organizations and the Oregon Transportation Commission</p> | <p>Administer the Northwest Area Commission on Transportation</p> <p>Administer the Northwest Oregon Transit Alliance</p> | <p>Conferences and speaking engagements</p> <p>Meetings with other organizations</p> | <p>Key Partners: ODOT, Cities, Counties, Ports</p> |



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