



Cascades West Economic Development District

2010-2015

Comprehensive Economic Development Strategy

*Serving Benton, Lane,
Lincoln, & Linn Counties*



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- ◆ 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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Benton County



Lane County



Lincoln County



Linn County

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SECTION 1

Introduction and Executive Summary

Document Context

This Comprehensive Economic Development Strategy (CEDS) is prepared for the 2010-2015 time period. It is intended to provide a framework for long-term economic development planning efforts in the four-county Cascades West Economic Development District (CWEDD) region of Benton, Lane, Lincoln, and Linn Counties, Oregon.

CWEDD is a partnership between Oregon Cascades West Council of Governments (OCWCOG) and the Lane Council of Governments (LCOG). The CWEDD is designated by the U.S. Department of Commerce Economic Development Administration to work on economic development efforts in the four-county 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.

Executive Summary

The following Executive Summary provides an overview of key findings contained in the CEDS and highlights regional goals and potential initiatives that can help reach the vision for the region's future.

Our Vision and Goals

CWEDD works collaboratively to reach a shared vision in which the region is a demonstrably superior place to live and do business. This vision 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 District's preferred future includes a diversified economy with range of employment opportunities that provide stable family wage jobs, lifelong learning and training opportunities, sustainable natural resources, and an integrated infrastructure.

To reach this future, the District has identified six broad goals:

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

- ◆ Build on the region’s entrepreneurial culture and assets.
- ◆ Support infrastructure assistance to communities.
- ◆ Provide technical assistance to communities and support capacity building efforts.
- ◆ Partner to improve workforce training and education.
- ◆ Support the needs of rural areas.

Key Challenges to Reaching the Vision

Our Economy, consistent with national trends, continues to be in decline. This economic crisis is relayed in recent closures of major manufacturing enterprises in primary sectors, loss of jobs, and high unemployment.

Our Natural Systems include a geographically diverse landscape from the Pacific Ocean to the crest of the Cascade Range that is 79% forest lands. The region is highly susceptible to natural resource policy shifts by government since almost half of the region’s land base is in State and Federal ownership. Balancing natural resource needs with development and redevelopment interests is an ongoing priority.

Our People are increasingly attracted to urban environments, with over half of the 590,000 residents of the region living in the four largest cities of Albany, Corvallis, Springfield, and Eugene. Economic indicators identify a growing have-have not divide in which both the number and the percentage of those in need continues to grow.

Our Communities are challenged to meet infrastructure capacity and maintenance needs. Transportation systems are of special concern. Water quality, quantity, availability, and cost are expected to significantly influence future development patterns.

Key Opportunities for Reaching the Vision

Our Economy continues to rest on a fairly diverse base. Emerging businesses in health care, bioscience, advanced manufacturing, and clean technology fields are expected to provide further diversification and employment opportunities in the near term.

Our Natural Systems support a variety of marine fisheries, wood products, and agricultural businesses. The marine ecosystem offers several new opportunities to restructure the regional economy through location of NOAA’s Pacific research fleet, wave energy R&D, direct-to-market seafood, and marine reserve pilots.

Our People have good basic job skills and access to a strong workforce training network. Significant enrollment increases at higher education institutions located in the region are expected to lead to an even stronger local workforce.

Our Community Resources include multiple world-class research institutions and innovation centers that are working to transfer R&D into products and businesses. A variety of alternative energy options and emerging energy technology will

help diversity the region's economy. Planned broadband investments will increase the competitiveness of the region. Announced medical facilities and health care investments will provide a base for growth in bioscience fields. Our communities and economic development entities work collaboratively.

How We'll Get There

The June 2010 regional "Building Our Future Economy" Economic Development Forum provided a snapshot view of several initiatives that could move the region toward the preferred vision for the future. These efforts build on, not replace, existing partnerships and resources in the region. It is expected that additional initiatives will be moved forward through annual review of the CEDS and development of committee action plans.

Accelerating Business Start-Ups: The Business Enterprise Center increases the speed and success of business start-up through focused business development support and access to flexible space. A permanent facility with specialty labs will allow the BEC to help more entrepreneurs to quickly move innovative ideas into the marketplace.

Assistance to Lane Rural Communities: This effort will provide technical assistance to the rural cities in Lane County, key business leaders, and critical area partners to identify the economic development priorities of Lane's rural communities. The focus will be on top projects, providing support with planning, grant writing, business development and recruitment, and other economic development efforts.

Branding the Region for Economic Development: Industrial siting experts noted recently that the Linn-Benton area would be more competitive in industrial location efforts if it shared a common approach. OCWCOG is prepared to launch a branding effort as an initial step in unifying a yet-to-be-determined area by building off of a common vision, resources, and challenges.

Community-Based Business Investment: There is a natural progression between buy local > produce local > invest local. Support of the Willamette Angel Network and establishment of new pools of funds for shared investment in new business ideas addresses financial impediments to business growth, builds local wealth, and also helps hold those new businesses in the region.

Expanding Bioscience Opportunities: A bioscience consortia developed by Linn-Benton Community College has identified several ways grow the region's economy through public-private collaboration and support of biomed, bio ag, and other innovation based business opportunities. Support of next implementation steps will help the region establish itself as a bio-center.

Industrial Readiness: Expansion of existing manufacturers and attraction of outside companies are hampered by the time and uncertainty required to develop industrial sites. Addressing site readiness issues such as sale price, wetlands regulations, and infrastructure requirements is critical to making sure that "good sites = good jobs" for the region's future.

Lane County BioEnergy: The BioEnergy Industrial Park will be a model for modern industrial park development. The Park will be a privately-owned site where local and regional low-value agricultural and municipal organic wastes will be processed through a variety of integrated conversion technologies to produce high-value, clean, renewable energy; biofuels; and green bio-products.

Lane One-Stop Business Assistance Center: Lane County needs a "One Stop" resource for business and the LCC SBDC would be a good fit. The One Stop would simplify entrepreneurs' search for resources, leverage and focus marketing efforts - avoiding marketplace confusion, provide low cost and cost-effective resources, coordinate resources and build synergies, avoid duplication, provide follow-up, and identify resource gaps.

University of Oregon RiverFront Research Park Expansion: Successful technology innovation increasingly requires access to lab facilities (wet and dry labs with associated fumehoods, specialized equipment, and ventilation systems). Funding for unique lab facility needs will enable the Park to support more life science, clean tech, and non-tech start-ups and spin-offs emerging from the universities and region.

Workforce National Career Readiness Certificates: Oregon's new NCRC system needs promotional support as it is launched. Currently recognized in 35 states, NCRCs will provide Oregonians with the ability to prove they have basic skills, provide businesses with a way to ensure job candidates have skills required, and provide job skill data that can be used to entice new businesses to tap into the brainpower in Oregon.

Guide to CEDS Contents

Section 1: Executive Summary relays key findings.

Section 2: Putting the Region on the Map provides basic background on geography, climate, and jurisdictions.

The next four sections delineate the social, environmental, cultural, intellectual, and political capital of the region:

- ♦ **Section 3: Our People** includes demographics, population, poverty, educational attainment, and labor force data.
- ♦ **Section 4: Our Natural Systems and Resources** provides background on resource lands; water, air, and land quality; natural hazards; wetlands; and threatened and endangered species in the region.
- ♦ **Section 5: Our Community Resources** reviews the status of local funding, land use, infrastructure, transportation, education, health, and other systems and resources in the region.
- ♦ **Section 6: Our Economy** completes the review of the region's existing assets and conditions. It presents an analysis of employment, unemployment, traditional industrial sectors, and emerging clusters.

Section 7: Challenges and Opportunities identifies key regional strengths, weaknesses, opportunities, and threats. This analysis focuses on the overall “health” of communities, individuals, the economy, and natural systems of the region.

Section 8: Regional Vision and Goals provides an overall vision and goals for the region, establishing the framework for identification of short- and long-term regional priorities. This section also identifies our economic partners.

Section 9: Cascades West Economic Development District Work Program presents the work plans to be undertaken by the two Councils of Governments. In addition to regional priorities, this section provides evaluation criteria.

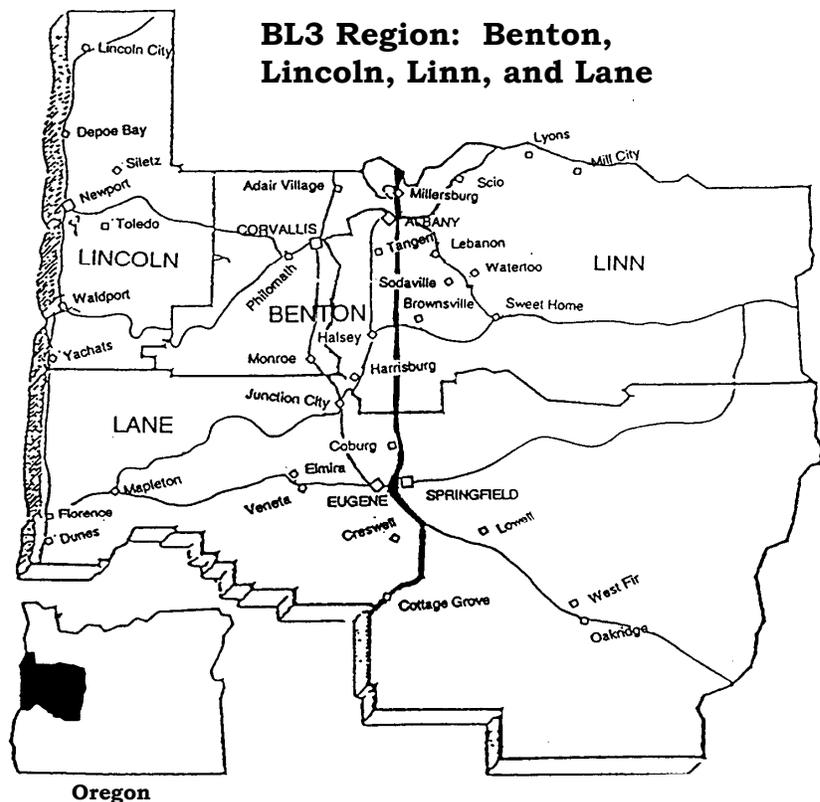


SECTION 2

Putting the Region on the Map

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.



Major highway routes include the north-south Interstate 5 (I-5) Freeway; Oregon Highway 99, also providing north-south access through the Willamette Valley; Oregon Highway 101, connecting the coast area north-south; with major east-west connections provided by U.S. Highways 18, 20 and 34, and Oregon 126. Union Pacific and Burlington Northern/Sante Fe rail main lines and multiple short lines service the region.

Geographic Profile

The region includes a variety of geographic features. Moving from west to east across the region, characteristics include:

- ◆ The **Pacific Ocean** coastline is framed by sandy public beaches, craggy cliffs, and the Oregon Dunes National Recreation Area. Rain waters move from the east side of the Coast Range through multiple creeks, rivers, and bays toward the ocean. Natural fresh water lakes dot the coastal area.
- ◆ Rain forest precipitation in the **Coast Range** promotes the growth of lush foliage and timber. The Siuslaw National Forest overlays most of the Coast Range within the region.
- ◆ **Coast Range foothills** are predominately secondary farmlands, where growth of Christmas trees has established the area as the “Christmas Tree Capitol of the World.” Multiple streams and rivers move water from the east side of the Coast Range toward the Willamette River. A dam creates the large Fern Ridge Reservoir.
- ◆ Elevations fall to around 200 feet along the Willamette River, which runs north through the alluvial **Willamette Valley** toward its mouth at the Columbia River. Prime and secondary agricultural lands grow a variety of crops, notably the nation’s largest grass seed production. Most of the population of the region resides near the Willamette River in the I-5 corridor.
- ◆ **Rolling foothills** with timber and secondary farmlands rise to frame the east edge of the Willamette Valley. Streams and rivers move large quantities of water toward the Willamette River. Large water reservoirs are formed in the foothill areas by Dexter, Cottage Grove, Green Peter, and Foster Dams.
- ◆ Elevations rise in the volcanic **Cascade Range** to peaks at Mt. Jefferson of 10,495 feet and at the 10,385-foot South Sister. The timbered Willamette and Umpqua National Forests overlay much of Cascade Range area of the region. Natural lakes dot the mountain area.

Land Base

90% of the land base in the region is in a natural resource designation. Federal and State governments control at least 46% of the regional land base.

Federal and State lands comprise at least 46% of the total area of the 5.4 million acre (8,601 square mile) region. As illustrated in the following table, 79% of the land base in the region is in forest land and 8% of the region is prime farmland

ACREAGE	Region	Benton	Lane	Lincoln	Linn
Area Total	5,433,000	428,000	2,913,000	631,000	1,461,000
Prime Farmland	457,000	76,000	160,000	0	221,000
Forest Land	4,317,000	268,000	2,477,000	555,000	1,017,000
-State/Fed Forest	2,476,000	85,000	1,582,000	234,000	575,000

Climate

The region has a temperate climate with moderate differences between summer high and winter low temperatures. The region receives more than 40 inches of rainfall per year, which promotes timber growth, a large agricultural sector, and, except in coastal areas, a relatively plentiful fresh water supply.

Cities

There are 36 incorporated cities in the four-county region. About 73% of the regional population resides in these incorporated areas (432,305 of 589,980 people per 2009 PSU estimate). (Gates and Idanha house some Linn County residents, but their totals are not included in regional data because they are part of the Mid-Willamette Valley Economic Development District.)

There are two Metropolitan Statistical Areas in the region: Eugene-Springfield and Corvallis. The four largest cities by population are Eugene (home of University of Oregon), Springfield, Corvallis (home of Oregon State University), and Albany. 54% of the region's population resides in these four cities (2009 PSU estimate).

Most of the incorporated cities in the region are small communities. In 2009, 25 cities in the region had an estimated population of fewer than 5,000 (69%) and eight of these cities had fewer than 1,000 residents (22%).

Port Districts

Ports manage a variety of recreational, commercial fishing, industrial, and shipping activities and facilities predominately focused along their respective waterfronts. As a form of government, port districts are overseen by elected officials and have the ability to tax and bond. Port districts in the region are:

- ◆ Port of Newport, based around the Yaquina Bay at Newport in Lincoln County
- ◆ Port of Toledo, based around the Yaquina Bay and Yaquina River at Toledo in Lincoln County
- ◆ Port of Alsea, based around the Alsea Bay at Waldport in Lincoln County
- ◆ Port of Siuslaw, based around the Siuslaw Bay and Siuslaw River at Florence in Lane County

Most residents live in incorporated areas, with over half of the population living in the four largest cities. 83% of the cities in the region house fewer than 10,000 people.

Incorporated Cities

Benton County:	Lane County:
- Adair Village	- Coburg
- Corvallis *	- Cottage Grove
- Monroe	- Creswell
- Philomath	- Dunes City
	- Eugene *
Linn County:	- Florence
- Albany */**	- Junction City
- Brownsville	- Lowell
- Gates**	- Oakridge
- Halsey	- Springfield
- Harrisburg	- Veneta
- Idanha**	- Westfir
- Lebanon	
- Lyons**	Lincoln County:
- Mill City**	- Depoe Bay
- Millersburg	- Lincoln City
- Scio	- Newport *
- Sodaville	- Siletz
- Sweet Home	- Toledo
- Tangent	- Waldport
- Waterloo	- Yachats

* County Seat
** Some cities lie in more than one county:
- Albany extends into Benton County
- Gates, Idanha, Lyons, and Mill City extend into Marion County

Tribes

Historically, multiple Native American bands lived throughout the region. Many Oregon tribes were consolidated onto reservations in what were, in the late 1800's, less desirable coastal areas. Today, the active tribes in the region are:

- ◆ Confederated Tribes of Grand Ronde is headquartered in the rural Polk County community of Grand Ronde
- ◆ Confederated Tribes of the Siletz Indians has its headquarters at Siletz and several related business ventures are located in Lincoln County and the mid-Willamette Valley
- ◆ Confederated Tribes of Coos, Lower Umpqua and Siuslaw is headquartered in Douglas County and operates a casino near Florence



SECTION 3

OUR PEOPLE

The populations of the four counties in the Benton-Lane-Lincoln-Linn region have much in common and the labor market of the region is increasingly inter-connected. However, there are significant differences in the demographic make-up of each county in the region. The counties also vary significantly in several areas from state norms.

Population and Growth

Total Population

Total population of the region was estimated at 589,980 in 2009 (Population Research Center, Portland State University). Between 2000 and 2009 the population in the region grew by an estimated 41,320 people, for an average annual growth rate of .8%. This rate of growth is significantly lower than the 1.3% annual average growth rate of the region from 1990-2000.

From 2000-2009 the annual growth rate slowed to less than 1% per year, with the majority of growth credited to in-migration.

The rate of growth varied dramatically between the four counties of the region during the period of 2000-2009.

- ◆ Benton County, with an annual average growth rate of 1.2%, was the fastest growing county during this period.
- ◆ Lincoln County was the slowest growing county in the region during this period, with an average growth of .06% per year.
- ◆ Lane and Linn Counties each grew at an average of .8% 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 7.5% between 2000 and 2009 compared to a statewide growth rate of 11.8% for the same period.

In-migration is still the primary population growth factor in the region. The Center for Population Research at Portland State University estimates that 73% (38,240) of population growth in the region was due to in-migration during 2000-2008.

The economic downturn appears to have impacted population growth within the region, as it has at the state-level. Please note that Certified Population Estimates for 2009 are not necessarily directly relatable to the 1990-2008 data provided by the U.S. Census Bureau.

County Population Trends

Year	Benton	Lane	Lincoln	Linn	Region
1990 Census	70,811	282,912	38,899	91,227	483,849
2000 Census	78,153	322,959	44,479	103,069	548,660
2001	78,149	324,822	43,886	103,597	550,454
2002	79,585	327,402	44,307	104,658	555,952
2003	79,398	330,504	44,448	106,132	560,482
2004	78,949	331,990	44,923	106,955	562,817
2005	79,452	335,422	45,396	108,336	586,606
2006	80,110	339,422	45,545	110,844	575,921
2007	81,151	342,781	45,781	113,053	582,766
2008	81,859	346,560	45,946	115,348	589,713
2009	86,725	347,690	44,700	110,865	589,980
2000-2009 Change	8,572 +11.97%	24,731 +7.66%	221 +.5%	7,796 +7.56%	41,320 +7.53%
2000-2009 Annual Avg.	+1.16%	+.82%	+.06%	+.81%	+.81%

1990 - 2008: U.S. Bureau of the Census, Table GCT-T1-R

2009: Certified Population Estimate, Center for Population Research at Portland State University

Population Projections

Growth projections through 2040 indicate that the region will continue to grow more slowly than the overall state. The State of Oregon Office of Economic Analysis, Department of Administrative Services (OEA) estimates that state population will grow by almost 58% by 2040, while the four county region will grow by only 41%, with the highest growth rate continuing to be in Lane County.

Growth projections by OEA are that in-migration will accelerate, with in-migration accounting for 83% of regional population growth through 2040. Coastal population is especially predicted to continue to age and it is projected that all net growth in coastal areas will come from in-migration.

Urbanization

The population of the four largest cities of the region grew 13.7% from 2000-2009, while the region as a whole grew by 7.5%.

The region is becoming increasingly urbanized, although at a slower rate than Oregon as a whole. In 1990, both the region and the state maintained approximately 70% residents in urbanized areas. By 2000, 79% of Oregon residents resided in urbanized areas or urban clusters, while only 76% of regional residents did (U.S. Census).

The four largest cities in the region of Eugene, Springfield, Corvallis, and Albany are driving regional growth. The combined growth rate of these cities was 13.7% from 2000 through 2009, compared with a 7.5% growth rate for the remainder of the region (PSU Population Research Center).

Population of Incorporated Cities

	2009 Estimate	2000 Census	1990 Census
BENTON	86,725	78,153	70,811
Adair Village	930	536	554
Albany (part)*	7,063	5,104	15
Corvallis	55,125	49,322	44,757
Monroe	690	607	448
Philomath	4,640	3,838	2,983
LANE	347,690	322,977	282,912
Coburg	1,080	969	763
Cottage Grove	9,485	8,445	7,403
Creswell	4,790	3,579	2,431
Dunes City	1,360	1,241	1,081
Eugene	157,100	137,893	112,733
Florence	9,580	7,263	5,171
Junction City	5,460	4,721	3,692
Lowell	1,030	880	785
Oakridge	3,755	3,172	3,063
Springfield	58,085	52,864	44,664
Veneta	4,975	2,762	2,519
Westfir	340	280	278
LINCOLN	44,700	44,479	38,889
Depoe Bay	1,420	1,174	870
Lincoln City	7,930	7,437	5,903
Newport	10,600	9,532	8,437
Siletz	1,190	1,133	992
Toledo	3,645	3,472	3,174
Waldport	2,145	2,050	1,595
Yachats	815	617	533
LINN	110,865	103,069	91,227
Albany (part)*	42,102	35,748	29,525
Brownsville	1,780	1,449	1,281
Gates (part)*	50	42	41
Halsey	840	724	667
Harrisburg	3,455	2,795	1,939
Idanha (part)*	85	85	112
Lebanon	15,580	12,950	10,950
Lyons	1,135	1,008	938
Mill City (part)*	1,330	1,225	1,247
Millersburg	1,170	651	715
Scio	790	695	623
Sodaville	295	290	192
Sweet Home	9,050	8,016	6,850
Tangent	1,000	933	556
Waterloo	215	239	191

*2009 Portland State University Certified Estimate
1990 and 2000 U.S. Census*

Demographics

Minorities

Minorities (Black or African-American, American Indian, Asian, Pacific Islander, and Hispanic or Latino) accounted for nearly 14% of the population in the region in 2008 according to U.S. Census population estimates. This rate compares with 11% in 2000, and 7.1% in 1990. At the state level, the minority rates were 20% in 2008, 19.1% in 2000 (Census), and 11.2% in 1990 (Census).

Racial composition differs among the counties of the region. Racial diversity in the region is the highest in Benton County (15.9% minority population in 2008), which may be influenced by a slightly higher proportion of Asian population (5.4% of residents). In Lincoln and Linn Counties, minorities account for 14.7% and 11.1% of the population, respectively.

In Linn and Lincoln Counties, Hispanic or Latinos comprise over 50% of all minorities (51.7% in Lincoln County and 56.8% in Linn County). Lincoln County, base of the Confederated Tribes of the Siletz Indians, has the highest percentage of American Indians (3.4%).

Growth of Hispanic and Latino populations are 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, 2008 Census estimates indicate that the Hispanic and Latino population had risen to 13.9% of the region.

Age and Gender

Most of the population in the region is of working age. Work force population in the region is expected to drop from the current 67% to 53% by 2040.

Age patterns in the region are generally similar to those statewide. According to 2008 Census estimates, one in five people in the region are under the age of 18 and 67% of the regional population is of working age (16-64 years). The region does have a slightly smaller percentage of pre-school age children (5.6% versus 6.4% for the state), and has a slightly higher percentage of population older than 65 (14.6% versus 13.1% for the state).

Age patterns vary dramatically between the four counties of the region. A large retiree population influences the older average age in Lincoln County, while the younger average age in Benton County is influenced by its proportionately large university student population. K-12 school enrollment decreases in areas of the region appear to point to a decline in the number of families.

Projections to 2040 (OEA) forecast that the retirement age population 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.

According to the U.S. Census (2008), 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.

Income and Poverty

Comparable Income Data

Income data provided by the U.S. Census Bureau's American Community Survey (2006-2008) indicates that, with the exception of some Benton County statistics, the region continues to lag behind income levels for Oregon as a whole as well as the United States.

Annual Income Estimates - 2008

	U.S.	Oregon	Benton	Lane	Lincoln	Linn
Per Capita	\$27,466	\$26,326	\$27,526	\$24,010	\$23,141	\$22,380
Median Household	\$52,175	\$49,863	\$50,350	\$44,180	\$39,328	\$44,977
Median Family	\$63,211	\$60,665	\$70,922	\$56,494	\$51,699	\$54,033
Workers' Median Earnings	\$29,530	\$27,108	\$21,687	\$25,165	\$22,305	\$26,911

American Community Survey, 2006-08 Estimates

Personal income is derived from the three basic sources of earnings, dividends/interest/rent, and transfer payments (retirement, medical, unemployment, and veterans benefits). The table below relates the higher level of transfer payments and lower level of earnings in Lincoln County, likely driven by its higher percentage of retirees.

Sources of Personal Income – 2007

	Oregon	Benton	Lane	Lincoln	Linn
Total Personal Income (000's)	\$131,277,786	\$2,953,718	\$11,269,508	\$1,455,639	\$3,182,834
Net Earnings	63.5%	64.1%	58.8%	52.4%	61.4%
Dividends, Interest, And Rent	20.0%	24.6%	23.8%	23.9%	16.4%
Transfer Payments	16.4%	11.2%	17.4%	23.7%	22.2%

U.S. Bureau of Economic Analysis

The following table also relays anomalies that are likely related to the demographic makeup of each county in the region. For instance, Benton County's relatively lower percentage of

households with Social Security and higher percentage of population below the poverty level are at least partially 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 income and of families below the poverty level.

Supplemental Income and Poverty Indicators - 2007

	U.S.	Oregon	Benton	Lane	Lincoln	Linn
Households with Social Security Income	26.8%	27.0%	21.9%	26.9%	36.8%	31.4%
Households with Cash Public Assistance	2.3%	2.6%	2.2%	2.2%	3.9%	2.1%
Households with Food Stamps	7.9%	10.9%	8.2%	12.6%	12.7%	12.7%
Families Below Poverty Level	9.8%	9.3%	8.1%	8.7%	11.9%	11.2%
Population Below Poverty Level	13.3%	13.5%	19.3%	14.3%	17.6%	14.0%
Population Under 18 Below Poverty Level	18.3%	17.4%	14.6%	14.9%	22.9%	22.4%

American Community Survey 2005-2007 Estimate

Income Disparity

While the average payroll after inflation increased in each county between 2000 and 2007, all remain at or slightly below the average payroll in Oregon. Income varies greatly, but consistently, among the four counties of the region and in comparison to statewide data whether measured by average wage, per capita income, or median household income.

Average wages in 2008 were:

- ◆ \$42,311 – Benton County
- ◆ \$35,363 – Lane County
- ◆ \$29,310 – Lincoln County
- ◆ \$35,170 – Linn County
- ◆ \$40,486 – State of Oregon

Economic disparity between the counties is influenced in part by industrial sector dominance and in part by population composition. Some areas of the region have a strong Leisure and Hospitality sector (\$16,362 annual statewide average wage in 2008) while others are adding large numbers of jobs in the Information sector (\$62,554 annual statewide average wage in 2008). The prevalence of small business ownership and a large retiree population also contribute to Lincoln County's lower average income levels. In Benton County, a proportionately large university student population impacts Benton County's median household income, but is less evident in that County's median family income data. The impact of university students on County income statistics is not as apparent in Lane County due to its overall larger population base.

The Oregon Employment Department's average covered wage calculation evaluates payroll and employment at establishments covered by the State's unemployment insurance system.

Average Covered Wage

	Oregon	Benton	Lane	Lincoln	Linn
2008	\$40,486	\$42,311	\$35,363	\$29,310	\$35,170
2007	\$39,564	\$41,972	\$34,324	\$28,384	\$34,704
2006	\$38,070	\$40,553	\$33,240	\$27,883	\$33,486
2008 % of Oregon's		104.5%	87.3%	72.4%	86.9%

Oregon Employment Department

Recent average wage information relays Benton County's proportionately higher rate of professional workers which help place the average wage in Benton County at above the average wage in the state (105% of state). It also points to Lincoln County's proportionately higher rate of retail and service trade workers (72% of state).

Poverty and Need

Overall poverty rates in the region are slightly higher than state rates.

The regional poverty rate increased between 2000 and 2008, from 13.8% to 16%

Overall poverty rates in the region tend to be higher than the state rate, with Benton County reaching the highest poverty rate among the four counties, at 18.5% (U.S. Census). Lincoln (16.8%), Lane (15.7%) and Linn Counties (15.7%) also had overall poverty rates considerably higher than Oregon's overall rate of 13.4%. Benton County has lower rates than the state in all measures except for overall poverty, which in Benton County is affected by the college student population.

The regional poverty rate increased between 2000 and 2008, from 13.8% to 16% (U.S. Census). The actual number of individuals in poverty increased from 73,790 to 90,675 during this period. The poverty threshold in Oregon is currently \$10,830 for an individual living and \$22,050 for a family of four.

Over 32% of families headed by women in the region were in poverty in 2000.

22% of all individuals living in poverty were children.

The highest poverty rates in the region were for families headed by women with children under 18 years of age. In the region, over 32% of these families are in poverty; at the state level the poverty rate for these families is 30.5%. The rate of children in poverty in the region equaled the child poverty rate at the state level – 17.5%. This is the equivalent of 20,599 children in the region, and 22% of all individuals living in poverty.

Other indicators also reflect that a large portion of the population in the region is in financial need. The American Community Survey estimated that 12.8% of regional households received food stamps during 2008, compared with 10.9% of households across the state (eligibility for food stamps is 185% of poverty rate). During 2008, the State of Oregon One Night Count accounted for 1,687 homeless individuals in the region. In the 2008-09 school years, 58.3% of students in Lincoln County qualified for free/reduced fee lunches compared with 42.9% in Lane, 41.3% in Linn, and 35.5% in Benton Counties.

Labor Force

The U.S. Census divides the labor force into six basic occupational categories (see table below). According to the 2006-2008 American Community Survey, conducted by the U.S. Census, the four counties in the region vary significantly amongst themselves and in comparison to the state.

Lane County closely reiterates state percentages. Benton County exhibits effects of its two primary employers, OSU and Hewlett Packard, with lower percentages than the other counties in all areas other than management and professional activities; the only exception is a similarly low level of resource industry employees

as that of Lane County. Lincoln County has a significantly higher percentage employed in service positions, reflective of its visitor-based economy. Linn County far exceeds the state percentage for those working in production and transportation.

Occupation in 2000

	Oregon	Benton	Lane	Lincoln	Linn
Total Employed	1,805,390	40,232	166,231	51,720	20,038
Management/Prof.	33.90%	47.0%	33.0%	27.2%	25.3%
Service	16.8%	14.9%	16.8%	22.9%	16.4%
Sales/Office	25.4%	20.5%	26.8%	26.0%	23.7%
Resource Industries	2.0%	1.7%	1.4%	2.7%	2.7%
Construction/Maint.	9.2%	7.2%	8.9%	10.4%	12.0%
Production/Transp.	12.8%	8.6%	13.0%	10.8%	19.9%

U.S. Census - 2000

Educational Attainment

Educational measurements indicate very different populations in each of the counties of the region. K-12 test scores, high school dropout rates, and educational attainment data show Benton County and Lane County exceeding state education norms, while Lincoln County and Linn County typically lag far behind Benton County and below state levels.

Testing measures typically show educational performance has improved in the K-12 schools of the region over the past five years. With a few exceptions, average countywide test scores typically exceed statewide averages.

High school dropout rates for the population over age 25 in the region have improved over time. During the 2007-2008 school year, dropout rates in Benton (2.6%) and Lane (3.3%) Counties were significantly better than statewide averages (3.7%), while the Linn County dropout rate was equivalent to state averages (at 3.7%). Lincoln County dropout rates (5.9%) significantly exceed the statewide dropout rate.

The over age 25 populations of Benton, Lane and Lincoln Counties exceed state norms for attainment of Bachelor degrees or higher (see Table). The populations in Benton and Lane Counties were nearly equal to or above the state norm for high school graduation rates. In Linn County, 15% of the population over age 25 did not hold a high school or equivalent diploma, compared with only 5.5% of Benton County, 10.3% of Lane County, and 10.1% of Lincoln County.

Educational Attainment – 2008

Age 25+ Completing:	Oregon	Benton	Lane	Lincoln	Linn
- High School or Higher	88.1%	94.5%	89.7%	89.9%	84.9%
- Bachelor/Higher	28.0%	48.3%	27.9%	23.0%	15.2%

American Community Survey 2006-2008



SECTION 4

Our Natural Systems and Resources

Agricultural and Forest Lands

Agricultural Lands

456,000 acres (8.4%) of the region is prime farmland. The majority of the prime farmland in the region lies along the Willamette River. Nearly 400,000 acres across Linn, Lane, and Benton Counties were under cultivation in 2008, producing a wide variety of vegetables, berries, grass seed, fruit, nuts, and other specialty products. In coastal Lincoln County, hay and vegetable crops were harvested from approximately 2,000 acres (OSU Extension). As a whole, the four-county region grossed \$552 million in farm and ranch sales in 2008, accounting for 11% of Oregon's total.

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 "capitol of the world." While not reflected in most land-oriented harvest data, the regional economy is also heavily influenced by the coastal fishing industry.

A healthy agricultural economy is promoted in the region through land use zoning, designation of urban growth areas, and property tax deferrals.

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 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.

Economic and community health in the region are directly impacted by Federal and State timber policies.

Douglas fir is the primary timber species in the Cascade and Coast Ranges. Much of the forest has a mixed lower canopy of Sitka spruce and western hemlock, and there are alder-dominated pockets.

Federal- and State-owned forests comprise 57% of all forest lands and include the Siuslaw, Willamette and Umpqua National Forests plus Bureau of Land Management holdings. (Refer to Section 2, Land Base Table.) With 46% of the regional land base in federal and State forest land ownership, public timber policies have a dramatic impact on economic and community health.

Timber harvest reductions have dramatically reduced the number of professional staff in the region focused on forest health. Federal staff reductions have resulted in closure of multiple U.S. Forest Service ranger stations, removing another employer from already economically fragile rural communities. While restoration, limited harvesting, and road abandonment efforts continue to place professionals in the forests, reduced oversight of remote areas allows illegal uses (poaching, marijuana cultivation) and fires to remain undetected for longer periods of time.

Surface and Ground Water Quality

Water quality and quantity issues have a large impact on development in the region. Water resources are used extensively for recreation, agriculture, industrial and commercial activities, and domestic needs. 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. Natural lakes dot the region, especially along the coastline and in the mountain areas. Dam structures have created larger lakes at Fern Ridge, Cottage Grove, Fall Creek, Dexter, Foster, and Green Peter.

A warming cycle in the Pacific Ocean appears to correlate with anadromous fish run reductions.

Urban storm water runoff and sewage effluent discharges impact bay health.

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. While professional opinions vary on the extent to which man-generated pollutants are impacting ocean health, the ocean is going through a warming cycle that appears to correlate with reductions in anadromous fish runs.

Estuaries serve critical functions in the ocean ecosystem. They also serve important economic functions as the home of marine life research, commercial fisheries, recreational fishing, and tourism. 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.

When finalized, the Willamette TMDL will be used to assess and regulate surface water uses. Additional information about TMDLs and other Willamette River planning efforts can be found at:

<http://www.deq.state.or.us/WQ/willamette/willamette.htm>

http://governor.oregon.gov/Gov/Willamette_River_Legacy/restore.shtml

The Willamette River contributes 15% of the annual average flow of the Columbia River, and is the tenth largest river in the continental U.S. Thirteen in-stream structures on the Willamette system regulate flows above Albany (the northern edge of the region).

In the Willamette Basin, many competing water uses contribute pollutants to the water supply, and the quality of both surface water and groundwater sources is a major concern. In 1996, the Willamette River was listed as “impaired” under the Clean Water Act for exceeding temperature and bacteria standards; in 1998 it also exceeded standards for toxins.

Several research and planning efforts have been undertaken at the State and local level to address these concerns. As listed by DEQ, these include:

- ◆ A Willamette River water quality study by DEQ identified high mercury levels in fish and found that the majority of pollution comes from rural, urban, and agricultural runoff.
- ◆ Implementation of the Oregon Plan for Salmon and Watersheds, which uses a watershed approach to implement localized projects.
- ◆ Most cities in the region have adopted TMDL (total maximum daily load) standards consistent with the DEQ requirements for temperature, bacteria, and mercury. These regulations protect surface water in the region and provide a clear regulatory standard for uses in the cities that might impact surface waters.
- ◆ Development of DEQ permits requiring cities to comply with Best Management Practices to control pollutants in stormwater runoff.
- ◆ Establishment of a Groundwater Management Area (GWMA) in the southern Willamette Valley to limit nitrate contamination in shallow groundwater.

Groundwater Health

Groundwater is an important natural resource. It 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, over time, can contaminate groundwater.

Other influences associated with development, such as septic system releases, lawn and garden chemical applications, and pollutants associated with vehicle use can also cause groundwater pollution. In addition to nitrate pollution of the groundwater, there are areas in the Willamette Valley where the groundwater is contaminated by naturally occurring arsenic. Research by the Oregon Department of Environmental Quality (DEQ) identified significant levels of pollution, primarily nitrates,

Significant levels of nitrates have been identified in groundwater between Eugene and Albany. For further details on the Southern Willamette Groundwater Management Area visit:

<http://www.deq.state.or.us/wq/groundwater/swvqwma.htm>

<http://gwma.oregonstate.edu/>

in groundwater between Albany and Eugene. In response, the Southern Willamette Groundwater Management Area was declared by DEQ in 2004, and an action plan was published in 2006. Currently being implemented, the goals of the plan are to:

- ◆ Achieve and maintain a lower level of nitrates;
- ◆ Engage citizens to encourage local action;
- ◆ Garner commitments from state, federal and local entities to reduce nitrate and protect the aquifer from other potential contaminants over the long-term; and
- ◆ Assist in identifying locally appropriate land uses and the development of strategies to prevent further leaching of nitrates into the river (DEQ).

Air Quality

Air quality is impacted by almost every natural and man-influenced factor; from plant growth and naturally occurring decay, to industrial and vehicle emissions.

High levels of air pollution can impact those with heart or lung disease, asthma, and challenged immune systems. Air pollutants may also impact habitat and water quality.

Six health-based Nation Ambient Air Quality Standards, established by the EPA, are monitored in areas that have or had air quality problems.

Generally, air in the region is of high quality. However, in recent years, the American Lung Association has consistently ranked Lane County among the nation's worst counties for air quality. In 2008, Lane County received a grade of 'F' for short-term particle pollution, demonstrating residents to be at risk for asthma, chronic bronchitis, emphysema, CV disease, and diabetes.

The poor air quality in Lane County is the result of periods of air stagnation. This often happens in winter months when temperature inversion conditions are created by warmer air aloft that traps cold air at the Willamette Valley floor. The combination of cold, stagnate air and restricted ventilation causes air pollutants to become trapped near the ground. Wintertime air inversions contribute to high particulate levels, while summertime inversions contribute to an increase in ozone levels, both causing the local air quality to deteriorate.

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:** The Eugene-Springfield area was designated a PM non-attainment area in 1980, re-designated in 1987, and last exceeded the federal standard in 1987. Following the adoption of tighter standards in 2006, Eugene/Springfield continues to reach attainment. Oakridge was designated a non-attainment area in 1994 and again in 2007. Oakridge last exceeded the standard in 2008. **Ozone:** Ozone levels are measured at one site in Eugene-Springfield and one site in Saginaw, both of which remain in attainment with federal ozone standards. Ozone levels have dropped since the late 1980s and remain below the primary and secondary eight-hour standards.
- ◆ **Carbon Monoxide:** Eugene-Springfield was designated a non-attainment area in 1978, last exceeded the federal standard in 1986, and was re-designated as an attainment area in 1994.

The region contains two of the three nonattainment areas in Oregon. These are Eugene-Springfield and Oakridge, both in Lane County.

Nonattainment means that a geographic area has not consistently met the clean air levels set by the U.S. Environmental Protection Agency in the National Ambient Air Quality Standards (NAAQS).

Oakridge exceed the American Lung Association's benchmark level for healthy air on 9 days in 2004, only 6 days in 2006, and 13 days in 2008. By comparison, the Eugene-Springfield area maintained healthy levels throughout 2004, and exceeded that

level on just one day in each of 2006 and 2008. In 2008, the Lane Regional Air Protection Agency was involved in several special programs, in addition to monitoring. These include:

- ◆ Warm Homes/Clean Air Oakridge Community Project - Matches residents with funding to help with the costs of home repairs, weatherization, and heating system upgrades.
- ◆ Everybody Wins, Phase II – Installs GPS units to truck driver habits, use patterns of the APUs, and APU cost effectiveness.
- ◆ Clean School Bus USA - EPA grant funding for retrofits or replacement of school bus engines.
- ◆ Ultra Low Sulfur Diesel Buy-Down Project - Partnering with DEQ, a \$0.05/gallon subsidy was provided for the purchase of ultra low sulfur diesel fleet vehicles.
- ◆ School No-Idle Campaign – Funding purchased no-idle zone traffic signs for use at local schools.
- ◆ Oakridge School Flag Project – An air quality curriculum was developed for students at Oakridge Elementary School.

Land Quality: Brownfields and Superfund Sites

Brownfield Sites

DEQ defines "brownfield" as:

"A real property where expansion or redevelopment is complicated by actual or perceived environmental contamination."

DEQ notes that every city and county has vacant, underused, and potentially contaminated properties.

338 sites in the region require some level of assessment or clean up.

As of February 2010, 527 sites in the BL3 region were identified on the Oregon Department of Environmental Quality (DEQ) Environmental Clean-up Site Information (ESCI) database. The variety of sites within the region listed on the ESCI database includes neighborhoods above contaminated groundwater plumes, vacant and abandoned properties, and active business locations. Past and current land uses on listed sites include dry cleaners, manufacturing operations, trucking facilities, gas stations, an abandoned mine, rail yards, landfills, army bases, and residences with leaking oil tanks.

DEQ has determined that "No Further Action" (NFA) is needed on 189 of the sites listed for the region, leaving 338 sites still requiring some level of assessment and/or cleanup. Fifteen of those NFA determinations were conditional, depending on the success of longer term, less expensive institutional or engineering controls to remediate the site. The ability to develop or redevelop sites without NFA status is in question until the existence of contamination is clarified and, if needed, remedied.

Only 9 of the 48 sites where hazardous substance contamination has been identified have received No Further Action status. Overall, 2 sites have been declared "Orphan Sites" because contamination is not tracked to a single contaminator, the contaminator is out of business, or the contaminator does not have resources to conduct cleanup.

Hazardous Waste Sites

Details about sites with known and potential contamination and current clean-up status are listed by DEQ at: <http://www.deq.state.or.us/lq/ecsi/ecsi.htm>

More information about sites on the CRL or Inventory is available at: <http://www.deq.state.or.us/lq/cu/siteassessment/releaselist.htm>

DEQ's map-based program that identifies sites in its database is at: <http://deq12.deq.state.or.us/fp20/>

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 ESCI 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. Examples of sites in the Inventory follow.

Evanite in Corvallis is monitored at four locations: its waste water facility where trace TCE and other contaminants were identified, where a 1978 TCE spill was covered by a parking lot after soil removal, lagoon of a prior paper mill that is now under a building, and at an underground mineral spirits tank. A work plan is being developed to utilize soil vapor extraction, well installation, pulsed pumping, and anaerobic dechlorination for the removal of additional TCE from the site.

Black Butte Mine, south of Cottage Grove, was a mercury mine from late-1890 into mid-1960. Arsenic and mercury were identified on the site and at area creeks. Orphan status was granted in 2002. OSU monitors site conditions.

Springville Dry Cleaners in Springfield is part of DEQ’s Dry Cleaner Program. Since 2002, DEQ has conducted groundwater monitoring, excavated and treated contaminated soil from beneath the former cleaners, and performed two rounds of chemical oxidation to help further decrease PCE levels in soil and groundwater. In 2007, DEQ began bioremediation of the shallow and deeper aquifers at, and down gradient, of the former cleaners.

Ridgeway Logging site in Sweet Home was determined to be a source of area wide groundwater contamination in 1992. Ridgeway Logging was designated as an Orphan Site in March 2001, after DEQ determined that the property owners and operators were unable to afford site cleanup. The site is currently undergoing bioremediation and monitoring.

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 twelve Oregon sites, two of which are located in the region.

United Chrome Products in the Corvallis Airport Industrial Park was listed on the NPL in 1984. Between 1956 and 1985, United Chrome’s plating tanks leaked into groundwater and aquifers. Contaminant traces were identified in surface waters two miles from the site. Clean-up has been completed and the site is currently under a one-year monitoring program. In July 2005,

DEQ made a preliminary conclusion that no further action will be needed.

Teledyne Wah Chang in Millersburg was identified for the NPL in 1987, with three areas to be remediated. DEQ expects cleanup goals for each of the areas (described below) to be met by the 15-year timeframe established under the NPL Decree.

- ◆ Seven unlined sludge ponds adjacent to the Willamette River where clean-up was completed in 1993 by removal of over 100,000 cubic yards of soil and solidification.
- ◆ Groundwater and sedimentation in Truax Creek was cleaned-up and finalized in December 2002.
- ◆ Cleanup of radium-contaminated soil was completed in 1999.

Addressing Brownfields

Several assistance programs are in place to help identify contamination, and to move brownfield sites toward clean-up and redevelopment.

- ◆ Site-Specific Assessments: DEQ accesses federal funds to gather detailed site condition information and to prepare recommendations and cost estimates for any clean-up.
- ◆ Funding through the State for assessments and clean-up is available for specific types of redevelopment.
- ◆ Orphan sites are designated when contamination poses a serious threat to human health or the environment and responsible parties are unknown, unable, or unwilling to pay for remedial actions. Orphan status opens public technical assistance and funding access.
- ◆ Independent Clean-up Pathway allows low- and medium-priority sites to be cleaned without ongoing DEQ oversight.
- ◆ Prospective Purchaser Agreement between DEQ and a prospective purchaser legally limits the purchaser's liability to the State for environmental clean-up of a property in return for a commitment to clean-up or fund clean-up of the site.

Further information on DEQ and other State brownfield assistance is available on DEQ's website: <http://www.deq.state.or.us/lq/cu/brownfields/index.htm>

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.

The level of detail in local plans varies greatly. Some communities are working with their County emergency services staff to prepare base-level plans, while others are preparing full-scale response procedures.

Floods

Communities continue to strive to balance development interests with flood management requirements and interests.

Traditionally, the most commonly occurring natural emergencies in the region have been floods. The region has continued to work on flood control, with damages from 1996 floods (reaching over \$34 million) resulting in attention to refining and adjusting emergency procedures and in the re-designation of some areas near Willamette Valley waterways as floodplain.

A recent example of continuing flood management efforts are repairs and improvements on the Fern Ridge Reservoir dam. While the development and recreation value of the reservoir is most apparent, the long-term positive value of flood control in maintaining economic stability is often overlooked. There are thirteen in-stream structures regulating Willamette River basin waters upstream of Albany (the northern edge of the region).

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 storm waters, and evaluation of fill requests have all been elevated in importance over the past decade.

Tsunamis

Most coastal communities in the region are focusing efforts on clarifying tsunami hazards, with attention to refined hazard boundaries, development policies, and evacuation plans.

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. As tsunamis enter shallower water near land they increase in height. Recent research suggests that tsunamis have struck the Oregon coast on a regular basis. Typical wave heights over the last eighty years occurring in the Pacific are twenty to forty-five feet at the shoreline. A few waves have reached one hundred feet or more due to local conditions.

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 are in the process of reviewing 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 world wide 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 ice and snow issues are so infrequent, most cities lack sanding and snow removal equipment. Local access can be limited and longer commutes can be hampered during heavier snowfalls and ice events.
- ◆ Only a few major wind events have swept through the Willamette Valley in the last twenty years. These events have included winds of up to 100 mph, downed trees and power lines, and left some areas isolated and without power.
- ◆ 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 at times.
- ◆ 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, while in predominately-unpopulated areas, can close roadways and strand communities.

Wetlands, Riparian Zones, and 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 are working to balance sometimes conflicting development goals with these resource-related goals. Many communities are emphasizing new land use patterns that bring natural resources into a development as an amenity, increasing the value of the development.

Planning sponsored by watershed councils at the watershed level allows the multiple interests within each watershed to be represented. Watershed councils in the region also provide restoration and enhancement education, project development assistance, funding, and implementation of projects.

Wetlands

Functioning wetlands serve as riparian cleaning zones, helping to remove contaminants before waters reach streams, rivers, and the ocean. They slow runoff and provide water storage capacity important to flood water management.

Wetlands in the region range from apparent marsh and bog wetlands to well-drained grass seed fields in the Willamette Valley. Historically, many industrial sites have been located in wetlands; this has been especially true of lumber mills. Other wetlands have been diked, tiled and/or drained for farming. The high incidence of hydric soils indicates that much of the Valley floor is potential wetland. Almost all of the vacant, undeveloped, industrially zoned lands in the Valley contain identified or suspected wetland areas.

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 of the vacant industrially zoned properties in the Willamette Valley contain identified or suspected wetland areas. Approval of wetland delineation and mitigation planning is needed to move these sites toward development.

Many cities have invested in further identification of wetlands. Local wetlands inventories identify and refine wetland boundaries. Cooperating with the property owner to delineate wetland area allows developers to move proposals forward with a higher level of certainty.

Wetlands can be addressed in a variety of ways. The size of the Willamette River Drainage Basin provides a large area in which wetlands can be mitigated for offsite. Many developments have elected to retain wetland areas as site amenities. There are also efforts underway to restore some wetlands to a natural state to take advantage of positive attributes of the wetland.

There are currently two multi-jurisdiction efforts underway to identify wetlands within the region. Cascades West Council of Governments is investigating mitigation needs and options for reducing review time and unknowns on key 10-acre and larger industrial lands. The Lane Council of Governments has begun working with cities where there is no current wetlands delineation to conduct or upgrade wetlands delineations and then work with those cities on developing programs to protect the wetlands while also providing development opportunities.

Benton County is carrying out a wetland and riparian planning and protection project. The effort will be used to inform watershed planning, including using assessment data to prioritize wetland restoration and incentives for protection and enhancement across and within jurisdictions of the County.

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. More stringent buffers are typically required on federal and State timberlands. Recent outreach and

demonstration projects have helped to improve agricultural land practices impacting riparian areas.

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

In 2009, the State of Oregon established two pilot marine reserves, one of which is located off of Otter Rock in northern Lincoln County. Two additional sites in the region have been identified for future consideration for reserve designation - one at Cape Perpetua near the border of Lincoln and Lane Counties, one north of Lincoln City at Cascade Head.

Because marine reserves provide permanent protection for habitats and the diversity of plants and animals in those habitats, they also protect ecosystem services including seafood production, climate regulation, recycling of nutrients, pest control, protection of coasts from erosion, and removal of excess nutrients coming from the land. They also enhance recreational opportunities and provide protection for cultural heritage. 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.

Marine reserves are ocean areas that are fully protected from activities that remove animals and plants or alter habitats, except as needed for scientific monitoring. More information about marine reserves is available at:
<http://www.oregonocean.info/>

Threatened and Endangered Species

Seventeen animal and six plant species listed through the Federal Endangered Species Act (ESA, see text box) 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).

The regional economy has been dramatically impacted by two ESA listings:

- ♦ The listing of the Spotted Owl (and later, the Marbled Murrelet) and the need to protect its' habitat brought about a reduction in logging in old growth forests. This has had an ongoing impact on timber harvests and logging in Oregon and Washington.
- ♦ The listing of four species of salmon and consideration of other listings, especially coastal Coho, brought into effect the Oregon Coastal Salmon Recovery Plan in 1995. Beginning in 2005, the Pacific Fishery Management Council recommended

The federal ESA was implemented in 1973. The Oregon ESA was enacted in 1987 and amended in 1995. The criteria for listing species are similar in both systems with a focus on the biological needs of the species.

33 animal (invertebrates, birds, fish, mammals, reptiles, and amphibians) are listed through the Oregon ESA. 31 of these animal species are also listed through the federal ESA, which has 18 additional listings not listed by Oregon.

*60 plant species are listed through the Oregon ESA. Two additional two plant species, *Arabis macdonaldiana* and *Howellia aquatilis*, have been federally listed, and are thus administratively protected by the Oregon Department of Agriculture.*

severe ocean salmon harvest restrictions along the Oregon and California Coasts. Resulting federal and State restrictions led the U.S. Commerce Department to declare Oregon's commercial salmon industry a disaster for three of the past four years.

Compliance with the Section 4D Rule of the ESA does not appear to have required the infrastructure and land use policy restructuring efforts initially forecast. However, communities in the region continue to watch closely to see if/how development practices and infrastructure systems may be impacted.

Climate Change

The Climate Leadership Initiative is a social science-based global climate change research and technical assistance program housed at the University of Oregon.

For more information, go to:
<http://climlead.uoregon.edu/node/36>

A recent study, *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.

Communities in the region are just beginning to grapple with the questions that arise from these predictions. In the meantime, federal and state governments are beginning to look at these questions and develop requirements for action. While the consequences of these projections and the growing mandates for action are still unclear, it seems certain that local governments and the local economy will be impacted by this issue.



SECTION 5

Our Community Resources

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.

Revenue limitations and ever-rising operational costs strain the ability of local governments in the region to meet the needs and expectations expressed by their citizens.

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. To stabilize payments, the 2000 “Secure Schools” Act was created and then extended twice, allowing federal payments to continue at altered levels through September 30, 2012 at decreased levels.

Oregon's land use system is based on

- Goal 1 Citizen Involvement*
- Goal 2 Land Use Planning*
- Goal 3 Agricultural Lands*
- Goal 4 Forest Lands*
- Goal 5 Open Spaces, Scenic and Historic Areas, and Natural Resources*
- Goal 6 Air, Water and Land Resources Quality*
- Goal 7 Areas Subject to Natural Disasters and Hazards*
- Goal 8 Recreational Needs*
- Goal 9 Economic Development*
- Goal 10 Housing*
- Goal 11 Public Facilities and Services*
- Goal 12 Transportation*
- Goal 13 Energy Conservation*
- Goal 14 Urbanization*
- Goal 15 Willamette River Greenway*
- Goal 16 Estuarine Resources*
- Goal 17 Coastal Shorelands*
- Goal 18 Beaches and Dunes*
- Goal 19 Ocean Resources*

Land Use Framework

Oregon’s statewide land use planning program, initiated in 1973, is based on nineteen statewide planning goals (see text box). 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.

Eugene/Springfield Urban Growth Boundaries

For almost 30 years, Springfield and Eugene have shared a single Urban Growth Boundary, jointly adopted by the governing bodies of the two cities and Lane County. Now, in response to a new State land use law, the two cities are preparing to adopt their own urban growth boundaries to accommodate projected growth for the next 20 years.

As part of this effort, both cities are undertaking major updates to residential, commercial, and industrial lands assessments as well as other tasks essential to coordinated and comprehensive planning for the future of the Metro Area and its cities. Each city is separately contracting with the same firm to prepare the inventories and assessments related to establishment of their separate UGBs.

These updates will be coordinated in public processes, with extensive citizen participation and intergovernmental coordination. Each city will co-adopt its new UGB with Lane County. The Eugene-Springfield Metro Area General Plan is expected to remain the Metro Area's regional general comprehensive plan.

Annexations

Due to successful local voter-initiatives, many communities must now take annexation requests and recommendations to their voters for consideration. While highly contentious elections have been few, addressing this additional development step, timing land use reviews with election schedules, and providing voters with adequate information to make this level of planning decision can impact development requests.

20-Year Supply

A 20-year supply of buildable land has been challenging for many communities, especially smaller ones, to quantify. Oregon's typically cyclic growth trends make accurate forecasting difficult.

Clarified by a 2003 State Supreme Court ruling, each city must evaluate whether land within their urban growth boundary is adequate to provide a twenty-year supply of buildable land for projected industrial, commercial and residential development. Under this ruling, cities are not permitted to adopt no-growth or slow-growth policies.

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. The City of Corvallis, for example, recently completed a natural features inventory. 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 to many of the 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).

Most cities in the region rely heavily on State highway infrastructure as a key component of their road network. Land use changes (e.g., zoning amendment) that impact the State's transportation system must address State transportation goals. Limited State resources to address safety and capacity issues mean that, to proceed, development must typically carry the burden of making any necessary highway improvements. Improvements, such as new on-ramps and under-crossings, are outside the financial scope of most development proposals.

Shovel-Ready Industrial Lands

Many communities are interested in providing an 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 shovel-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.

Oregon Cascades West Council of Governments is implementing a multi-jurisdictional industrial lands readiness project which addresses development barriers associated with known or suspected wetlands. Initial findings include that the biggest impediment for build-to-suit development on larger (10+ acre) industrial sites are the uncertainty of outcomes and time required to work through governmental processes. CWCOG is currently pursuing a streamlined regional permit approach and is evaluating the formation of a government-owned wetlands mitigation bank.

Downtown Redevelopment

Public and private sectors are working together in many communities to improve their downtown's streetscape and historic building facades, in hosting community events, and in attracting an improved business mix.

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.

Water Quality Violations

The State of Oregon reported that 28 public water systems in the region had drinking water standard violations in 2007. Two of those systems failed to adequately treat drinking water to meet the requirements of the Surface Water Treatment Rule, sixteen systems violated fecal/total coliform limits at least once during the year, seven systems had violations of lead or copper levels, and four systems exceeded arsenic limits. Additionally, three systems did not meet filtration requirements or exceeded the allowed level of other chemicals.

Drinking water rules, funding, systems in violation, and related information is available on the State Drinking Water Program website at: <http://www.oregon.gov/DHS/ph/dwp/index.shtml>

System Improvements

The cost of providing safe water may shape the development that occurs in an area. Where systems do not comply with the standards set by the Safe Drinking Water Act of 1986, water suppliers must make often-expensive improvements to their water source and treatment systems. The ability of the public and private sectors to pay those costs will influence the final outcome of development ability as development shifts toward areas that meet requirements and have lower water costs.

The availability and cost of water is expected to become an ever-increasing consideration in where new development happens.

Security of water supplies from acts of terrorism or sabotage is now an issue that all water providers must address. The State Drinking Water Program adopted rules that require all public water systems to have a written emergency response plan based on a security vulnerability assessment. Making physical improvements, such as monitoring systems or fencing results in additional expenses to communities.

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. Today, the growing city needs to address water losses from that aging system in addition to locating additional secure water sources to sustain future growth.

Water Supply on the Coast

Due to the geology of the coastal area, most communities rely on surface water sources. Water shortages during periods of low flow are a major concern for the coastal cities, especially those with only one water source.

Several coastal water systems are working on how to provide water service during periods of low flow.

In Lincoln County, multiple efforts are underway to find more secure water sources. At the local level, cities like Siletz are

testing for groundwater sources. At the regional level, two separate efforts are currently underway to study the feasibility of a new reservoir. Additionally, three cities and two water districts in southern Lincoln County completed a study that considered the feasibility of connecting their systems to meet emergency situations.

Waste Water Systems

Cities which have been unable to meet federal standards are increasingly using the tool of a Mutual Agreement Order to work with the State Department of Environmental Quality.

Issues related to sewage collection and treatment are important to economic development in the region. Many cities with systems that were not able to meet the Federal Clean Water Act standards entered Mutual Agreements and Orders (MAOs) with the Oregon Department of Environmental Quality. The MAOs established milestones and timelines that the cities must follow to bring their systems into compliance. There are currently several city sewer system improvement projects underway as a result of MAOs.

Coburg residents recently voted to approve the city's wastewater system. The \$28 million project will connect residents' current individual septic systems to a city-wide sewer system which will collect and treat waste water. Coburg is one of the largest cities in Oregon without a municipal sewer system. Grants will provide about \$9 million for the project. The other \$16 million will be repaid through various organizations, including the City's Urban Renewal Agency and local improvement districts. The system is expected to be up and running by 2012.

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. Major issues that affect sewage treatment and collection in the region are outlined below.

Geography

Much of the region, particularly the Willamette Valley, has a high water table. This affects communities that lack community treatment systems because most individual septic systems are ineffective when flooded. In addition, many unsewered areas also have small lot sizes that make it impossible to install adequate septic drain fields.

Land Use Regulations

Oregon land use laws limit the provision of community sewer service in areas that are not zoned for development activities, such as agricultural lands. There are some pockets of residential development that are in need of services, but which cannot be economically serviced with a community system due to their location in a restricted area.

Economic Factors

Limited Federal and State assistance requires cities to take on additional debt, which is especially difficult for smaller cities to take on.

Sewage facilities are expensive to install, maintain, and expand. It is especially difficult for some of the small communities to finance a new system or improve an existing system. Some communities have deferred needed maintenance, resulting in facilities that are not capable of meeting required standards. Additionally, there is not enough capacity in many existing systems to accommodate economic expansion and growth. Grant funds for wastewater projects have diminished significantly in the past decade, so communities have to finance more project costs with loans or bonds.

Infiltration and Inflow (I&I)

Many sanitary sewer systems in the region experience high rates of storm water infiltration and inflow (I&I) during the winter season when rainfall is high. I&I problems occur due to aging collection systems that have deteriorated, improper connections that allow storm drainage into the system, and, in some cases, outdated designs that actually encourage infiltration to flush out the systems. High levels of I&I force some communities in the region to bypass raw or partially treated sewage into receiving streams during periods of heavy rain.

I&I is expensive and difficult to fully correct. It can seriously limit the potential for economic development in a community by eliminating excess sewage treatment capacity.

Conflicting Environmental Uses/Values

Community sanitary sewer systems necessarily require land for facilities and places to release effluent and/or dispose of sludge. These land requirements often conflict with other uses or environmental values. For instance, siting of sewage lagoons may be difficult due to restrictions on the use of wetlands or the location of a sensitive species.

Storm Water Treatment

Storm water runoff is a potential source of pollution that is regulated as a result of the Clean Water Act. Cities within Census designated “urbanized areas” must obtain permits for storm water discharges. Also, the Act specifies that businesses within certain industrial categories must obtain permits.

TMDLs

TMDLs for mercury, bacteria, and temperature (and in some cases pesticides and dissolved oxygen) were established by DEQ for the Willamette Basin in 2006. These findings have resulted in limits to the amount of each pollutant that each wastewater system can discharge into the Willamette River or its tributaries.

To assure TMDL compliance, many local and regional entities with the authority to manage and regulate sources of pollution are now required to develop TMDL Implementation Plans, outlining a list of pollutants of concern and their sources (if known), proposed treatment strategies, a timeline for implementation activities, and proposed methods for monitoring

Additional information about wastewater issues related to the Willamette Valley can be found at:
<http://www.deq.state.or.us/wq/willamette/willamette.htm>

the effectiveness of implementation activities. This effort may also necessitate that some municipal wastewater systems in the region be upgraded to meet the new standards.

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 & Diversion

All counties in the region met the State goal of no annual increase over the 2005 rate of waste generation. In 2008, the percentage of waste recycled was 41% in Benton County, 46% in Lane County, 31% in Lincoln County, and 41% in Linn County. The percent of waste recycled in the region was up substantially from ten years ago for all but Benton County, which remained the same (Lane up 6%, Lincoln up 11%, and Linn up 10%). Curbside recycling at residences and businesses throughout the region contribute to recycling increases (DEQ).

A significant share of recycled materials in all four counties is moved into energy recovery; with a high of 47% of total recycling in Lincoln County (Lane saw 27%, Linn 22% and Benton 16% of all recycling going to energy recovery in 2008). A lesser amount went to compost – 21% in Lane, 18% in Benton, 11% in Linn, and less than 1% in Lincoln.

Reprocessing of materials, especially from the manufacturing and building industries, has been identified as a potential economic growth area.

Industries and governments in the area are aware of the potential for diversion of waste, as shown in the amount of recycling already moved to energy recovery. Lane County has completed a feasibility study on alternate uses for solid waste. This study looked at the potential for diversion of food waste from the landfill to more productive uses. The study found that there is significant potential in the diversion of food waste from the landfill to energy production. Further, industries within the region use recycled fiber. A recent study identified potential for growth in the reprocessing industry, particularly for manufacture of building materials.

Hazardous Waste

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.

Energy

As hydropower generation is challenged by environmental requirements, the region may experience reduced output, higher energy prices, and an increased demand for alternative sources.

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. The U.S. Department of Energy reports that electrical consumption in Oregon in 2005 was 69% from hydro, 20% from natural gas, 8% from coal, and 3% from renewables other than hydro.

The announced restructuring of contracts by Bonneville Power Administration in 2011 is expected to reshape the region's power base. Under new contracts, BPA will continue to sell the output of the federal system to its customers, but will not buy additional power from them unless specifically requested to do so. Energy customers will be responsible for securing the generation or conservation resources needed to meet future load growth.

Current trends support the exploration and implementation of energy alternatives. Environmental requirements that protect salmon runs by requiring early release of water can impact stability of hydro-based energy supplies. Further, the State has adopted greenhouse gas reduction goals, creating pressure for the development of alternative electrical energy sources.

Alternative Energy Sources

Proximity to the Pacific Ocean may allow the region to take advantage of alternative wind or tidal energy sources. Oregon State University, Lincoln County, federal and State agencies, and communities along the coast are evaluating the opportunity to turn Oregon into a focal point for wave energy development. The U.S. Department of Energy announced in 2008 its support to establish the Northwest National Marine Renewable Energy Center at Oregon State University's Hatfield Marine Science Center in Newport.

Multiple efforts are developing alternative energy sources using what have historically been considered waste products.

- ◆ The Consumers Power, Inc. cooperative is producing 8.5 mw of electricity by burning methane at the Coffin Butte Landfill. This system reduces greenhouse gas emissions while putting electricity onto the grid.
- ◆ A woody biomass co-gen facility was put on line in the region's North Santiam Canyon in late 2007 by Freres Lumber Company. Residuals burned in a boiler produce steam for the mill's drying operations and generate around ten megawatts, of which about eight are put onto the grid. The Eugene-area Seneca Sawmill is underway with the development of a similar co-gen facility designed to produce eighteen megawatts. Cascade Renewable Energy is also currently developing a pilot woody biomass plant.
- ◆ Stahlbush Island Farms, Inc. near Corvallis is operating a first-of-its kind anaerobic digester/biogas plant which converts fruit and vegetable byproducts to 1.6 mw of electricity.

- ♦ While there is a market for some types of grass straw, much of the straw produced in the valley is currently a waste product. Anaerobic digestion of straw with food waste can produce electricity that qualifies for the highest-level of renewable energy credits. Efforts to efficiently develop ethanol from grass straw also continue.

Lane County has completed a business plan for development of an alternative energy park.

Communications

Information services, such as broadband, have become a basic necessary infrastructure element. Employers of all types expect broadband services, whether they are retail operations using broadband for inventory control and sales transactions, or are manufacturers using broadband to reduce shipping costs and improve communications with clients. Broadband services are also becoming increasingly important in meeting the quality of life desired by residents.

The region participated in planning and directing the incumbent local exchange provider's (Qwest's) development of a redundant telecommunications ring connecting all four counties in the region. This has resulted in a fairly extensive network of broadband capacity, including basic broadband services for many of the rural areas of the region.

Some of the local governments in Lane and Lincoln Counties have created organizations (CoastNet and Regional Fiber Consortium) to hold some telecommunications assets and to bring additional competitive broadband service to the area. Wireless broadband has also come to the larger urban areas of the region.

There are, however, still portions of the region that lack broadband services. Broadband deficiency is an increasingly major barrier to economic development.

The lack of broadband services in areas of the region is considered a barrier to economic development efforts.

Demand for increased bandwidth at decreased prices continues to exceed supply. The region has succeeded in attracting several large employers that are dependent on the availability of broadband services, and the general availability of broadband continues to help nearly all the region's employers increase the range of services offered and the efficiency of their operations. If the region can continue to improve the range of broadband telecommunications services, and to build on broadband as information science evolves, the region should be able to remain competitive for maintaining and expanding its employment base.

The availability of funds through the American Reinvestment and Recovery Act for broadband deployment is leading to a range of applications for development in the region. The applications demonstrated the continued importance of broadband deployment for the region, and the difficulty of such deployment under conventional financing systems.

Lane Council of Governments recently won an \$8.3 million grant for broadband improvements in parts of Lane, Douglas, and Klamath counties. An important goal of the plan is not only to spend money in ways that reduce unemployment, but to make investments that will build a foundation for lasting recovery. LCOG coordinated the efforts of the regional fiber optics consortia and telecommunications companies to win the grant. By the end of 2011 this project will bring high-speed broadband connections to unserved “critical institutions” - schools, hospitals, clinics, libraries, and police and fire stations - in Coburg, Cottage Grove, Creswell, Eugene, Florence, Junction City, Lowell, Oakridge, Springfield, and Veneta in Lane County as well as several Douglas and Klamath county communities. This will not be a comprehensive high-speed network, connecting every home and business. It will be what’s called a “middle mile” system, providing the backbone and arteries from which private operators could extend “last mile” service to residential and commercial customers. Critical institutions, which require fast Internet service most urgently, will receive service under this effort.

Transportation Systems

Communities in the region recognize the importance of a quality transportation infrastructure to the region’s economic vitality and livability. However, despite consistent efforts to improve mobility within the region, communities face the ongoing issues of increasing traffic congestion, deteriorating roadways, aging rail infrastructure, limited alternatives to automobile travel, and funding that does not keep pace with the needs of the system.

Area Commissions on Transportation

To address the region’s transportation needs in a comprehensive and coordinated manner, communities work through Area Commissions on Transportation (ACTs) chartered by the Oregon Transportation Commission to 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 ODOT’s decision making.

- ◆ The Cascades West Area Commission on Transportation (CWACT) represents communities in Benton, Lincoln, and Linn Counties. CWACT provides a regional forum for transportation dialogue, coordination, and decision-making. Prior to receiving the CWACT charter in 1998, the Transportation Advisory Committee of Oregon Cascades West Council of Governments served in many respects as an ACT.
- ◆ Lane County, in consultation with local officials and transportation stakeholders, is currently forming an ACT.

Communities working through their ACT play a critical role in the development of Oregon’s four year transportation capital improvement program (the State Transportation Improvement

Program). The STIP, as it is commonly known, identifies the priorities, funding, and scheduling of transportation projects and programs. It includes highway, passenger rail, freight, public transit, bicycle, and pedestrian projects and programs. It is important to note that one of the STIP eligibility criteria and prioritization factors is a project's support of economic development plans and goals. Specifically, "priority should be given to projects that assist implementation or realization of state, regional or local economic development goals and plans" (STIP 2012-2015 Project Eligibility Criteria and Prioritization Factors).

Metropolitan Planning Organizations

In addition to representation and coordination through regional ACTs, parts of the region are included within the boundaries of 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.

- ◆ Corvallis, Philomath, Adair Village and a small portion of unincorporated Benton County are served by the Corvallis Area Metropolitan Planning Organization (CAMPO). CAMPO is staffed by Oregon Cascades West Council of Governments.
- ◆ Springfield, Eugene, Coburg and a small area of unincorporated Lane County are served by the Central Lane Metropolitan Planning Organization. The Central Lane MPO is operated by the Lane Council of Governments.

Funding

Two significant and comprehensive transportation funding packages have been approved in the past year:

- ◆ Federal American Recovery and Reinvestment Act (ARRA)
- ◆ State of Oregon Jobs and Transportation Act (HB 2001)

ARRA provides \$471 million to preserve and improve the state's highways, transit systems, rail systems, and bicycle/pedestrian infrastructure. Local government received \$100 million in highway program funding and \$126 million will be invested in public transportation systems. 65% of ODOT's funding flowed to Economically Distressed Areas. In addition to quickly creating and preserving jobs these investments will improve the state's transportation system and improve long term economic health

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, air, port, and transit systems.

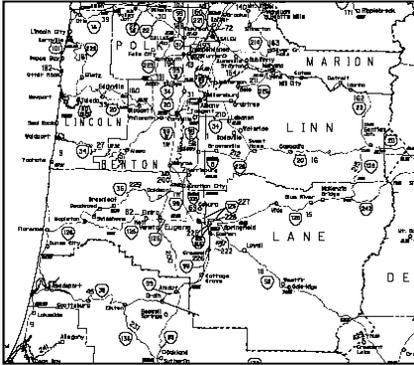
More information about CAMPO and the CAMPO Transportation Plan are available at:

<http://www.corvallisareampo.org/>

More information about the Central Lane MPO and the Eugene-Springfield Metro Area Transportation Plan are available at: <http://www.thempo.org/>

Additionally, with \$1.3 billion of Oregon Transportation Investment Act (OTIA III) funds approved by the Legislative Assembly in 2005, work continues on the repair or replacement of hundreds of aging state-owned bridges through the state.

Roadway Network



The regional roadway network consists of several State highways that are the primary linkages between communities within the region; Interstate 5, the principle 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.

Vehicle Miles Traveled (VMT) continue to increase due to population growth and the regional pattern of employment concentration in the larger urban centers and continued housing growth in both larger and smaller communities. As a result, a growing number of workers are commuting out of their cities of residence to their work sites.

Population growth and the concentration of employment opportunities are the major factors influencing continuing increases in VMT.

Funding of roadway improvements has lagged behind these increasing capacity needs as well as ongoing maintenance requirements.

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 Central Lane Metropolitan Planning Organization (Eugene-Springfield) identifies and prioritizes projects in the Lane County area of the region.
- ◆ The Corvallis Area Metropolitan Planning Organization identifies and prioritizes projects within its boundary.

The regional and local transportation stakeholders support the concept of least cost planning and, as noted above, the importance of including economic development in STIP eligibility and prioritization factors. As part of this effort, regional and local stakeholders continue to stress the importance of comprehensive and integrated transportation corridor planning; and economic development factors are an important element of integrated infrastructure planning efforts.

The \$200 million Highway 20 Pioneer Mountain-Eddyville project, currently under construction, represents an enormous commitment by Oregon, the federal Department of Transportation, and local communities to address regional and statewide safety, congestion, and economic development issues. Among other benefits, the completed project will re-open important truck connections between I-5 and coastal communities.

Recent freeway interchange projects in Lane County have increased mobility and safety. Proposed projects on Highway 101 in Lincoln County will address congestion and safety issues.

Initial environmental work on the widening of I-5 in the Albany area and related improvements to interchanges will reduce congestion, improve safety and increase access to commercial and industrial areas. Bridge projects through the region have increased safety, expanded capacity and, in some cases, improved freight options. The largest source of funding was provided by the Oregon Transportation Investment Act III, which allocated \$1.3 billion to repair or replace hundreds of aging state-owned bridges throughout the state.

ARRA projects include: I-5 preservation project in Linn County; western connection of Highway 20 modernization project in Lincoln County; and several pavement preservation projects in Lane, Lincoln, Linn, and Benton Counties.

ARRA direct allocations to local agencies provided a variety of infrastructure projects in the region. The majority of the projects were completed by the end of 2010. Funding awards were:

Central Lane MPO	\$6,500,000
CAMPO	\$1,200,000
Lane County	\$1,700,000
Benton County	\$490,000
Linn County	\$1,100,000
Lincoln County	\$680,000
Cities in Lane County	\$516,000
Cities in Linn County	\$1,560,000
Cities in Lincoln County	\$394,000

State Jobs and Transportation Act funds have already been allocated to the I-5/Beltline interchange project and the Beltline/Delta Highway interchange project in Lane County.

Public Transit

Commuting via transit from the smaller cities in the region is minimal because of scheduling limitations.

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
- ◆ Linn-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 predominately students, seniors, and persons with disabilities.

Door-to-door demand-responsive service is available to seniors and persons with disabilities. Efforts to improve the capacity of this network of numerous independent public and private operations are underway in both the Benton-Linn-Lincoln and the Eugene/Springfield areas of the region.

In addition to plans developed by local transit systems, each of the four counties in the region have developed a Coordinated Public Transit-Human Services Transportation Plan to establish a framework to better support the delivery of transportation services to seniors, persons with disabilities, and residents with low-income. The plans identify transportation needs, current resources, and opportunities to coordinate and enhance community transportation services. The plans for Benton, Lincoln, and Linn Counties include a regional chapter which identifies and prioritizes transportation needs and issues of a regional nature or scope.

ARRA funded transit projects include: \$6.4 million for Lane Transit District bus maintenance facility and the district's preventive maintenance program; \$3 million for Lane Transit District hybrid-electric vehicles; \$1,105,000 for Corvallis Transit vehicles; \$771,000 for Lincoln County Transit bus maintenance facility; \$550,000 for Albany Transit vehicles and equipment; \$317,000 for Linn-Benton Loop vehicles; \$170,000 for City of Lebanon transit vehicles; and \$208,000 for Sweet Home vehicles.

State Jobs and Transportation Act funds, through a federal transit fund exchange program, will significantly increase funding for transportation services for seniors and people with disabilities. Additionally, the 2009 Legislative Assembly allocated \$10 million for Special Transportation Operations to improve transportation services for seniors and people with disabilities. Connect Oregon II awarded \$650,000 to Lane Transit District for the Veneta Transit Center.

Rail Service

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 short line 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.

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.

Over 2,500 existing jobs in the region are linked to the continued availability of rail freight service.

A 2005 examination of the role that rail transportation plays in economic activity in Linn, Benton, and Lincoln Counties and its future potential identified improvements needed in the short lines and in the interface of the short lines with the Class 1 railroads.

While improvement of the rail infrastructure could contribute to economic growth in the region, the greater benefit of making priority improvements was determined to be the retention of over 2,500 jobs in industries currently dependent upon rail freight.

In 2009, ODOT developed an Intercity Passenger Rail Study that evaluated options regarding higher speed rail service between Eugene and Portland, with an accompanying improvement to freight rail service. Oregon and Washington are one of eleven high speed corridors identified by the federal government; and it is expected that increased federal funds for high speed corridor improvements will be available, on a competitive basis, during the coming years.

ODOT is currently developing a Freight Plan (rail, airports, ports, and highways) which will provide direction for improved connections between local, regional, state, national, and global markets to increase trade-related jobs and income for Oregon workers and businesses. ODOT has also discussed the need to update the 2001 Rail Plan (freight and passenger service).

Nearly \$4.5 million of ARRA were allocated to two track upgrade projects in Linn County. \$180,000 was allocated for improvements at the Eugene rail station. ARRA provided \$37 million to purchase two train sets used by the *Cascades* rail service between Eugene and Portland. A down payment on the Pacific Northwest Rail Corridor higher speed rail program was made with an \$8 million first round ARRA federal allocation for improvements in Portland.

The 14 mile Bailey Branch rail line in Benton County runs south of Corvallis to Monroe and over to Dawson. The rail line serves several local freight-shipping businesses, including Hull-Oakes Lumber and Venell Farms, but it suffers from lack of maintenance and the railroad has determined that low freight volumes do not justify the cost of repairs. Union Pacific embargoed the rail line in June 2007. Benton County has worked with local stakeholders toward the restoration of service for freight, as well as securing the right-of-way for future passenger rail to the Eugene Airport. In recognition of the importance of this rail line to the local, regional, and state economy, the Cascades West Area Commission on Transportation has supported the efforts to acquire and upgrade the rail line.

Connect Oregon II funds were allocated to two rail upgrade projects in Linn County totaling \$10.8 million. The \$6.9 million Albany Rail Corridor project will reduce bottlenecks and the resulting congestion on a short line freight line, as well as main line Union Pacific freight service and Amtrak passenger service. The motoring public will also be served with several highway-rail crossing improvements. The project also increases capacity of the Millersburg Yard so that it can become the principal switching and classification facility for the Portland and Western railroad network. The rail yard improvements will make a significant economic difference to local business.

In addition to the need to upgrade a large amount of track in the region, improvements to the centralized traffic control system are a very high priority of rail stakeholders. A pending Connect Oregon III application by Union Pacific and Portland and Western would improve the centralized traffic control system and significantly improve local, regional, and state rail service.

Carpooling and Vanpool Services

Commuters in the region have the option of utilizing 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.

Multi-Modal Transportation

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.

ARRA provided \$1.3 million to assist in the construction of a new bike/pedestrian bridge in Eugene. The City of Corvallis was awarded \$483,000 to repave a multi-use path and Benton County used \$90,000 of ARRA funds to repave a multi-use path. Newport received \$593,000 for bicycle/pedestrian improvements. Albany was awarded \$650,000 to expand a park and ride facility at its rail station.

Air Service

Newport Airport has recently joined the Eugene Airport in providing scheduled commercial air service. SeaPort Airlines provides connections between Newport and Portland International Airport. SeaPort service is partially funded with \$3.6 million grant from the Connect Oregon II program.

Eugene Airport (EUG) is the second largest airport in the state of Oregon and is the largest non-hub airport in the nation. Located along the I-5 corridor at about the mid-point of the state, the Eugene Airport serves an area encompassing 83 zip codes with a population of approximately 679,000.

Nonstop service includes Portland, Redmond, Oakland, Seattle, San Francisco, Los Angeles (with a hop through Medford), Denver, Salt Lake City, Las Vegas, and Phoenix. Connections to anywhere in the world are available through four airlines

operating at EUG, including Allegiant Air, Delta Connection, Horizon Air, and United Express.

A new runway was completed recently. Because of deterioration and inadequacies, the old Runway 4/21 was demolished. The new 6,000- by 150-foot Runway 16L/34R and full parallel taxiway system were constructed. Both the runway and taxiway are connected to the existing terminal area through a dual parallel taxiway system. In addition, improvements to the existing airfield taxiway system were completed to develop a more efficient taxi system.

Corvallis Airport: The general aviation airport in Corvallis has struggled to retain commercial service linking the mid-Willamette Valley to the larger air service network. Charter air service has helped increase corporate air traffic over the last ten years.

Albany Airport: The cost to operate of the general aviation airport in Albany in recent years has exceeded revenues. The City of Albany has established an airport advisory commission to review operational and development options. Albany has applied for \$780,000 in Connect Oregon III funds to construct a 450 foot paved overrun to increase safety.

Marine Transportation

The region 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, a deep draft port, is the largest in the region. 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.

Funding and activities through the U.S. Army Corps of Engineers are critical to the maintenance of port facilities in the region.

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

The quality of life amenities provided by the recreational and cultural amenities of the region are important to the attraction and retention of business and industry.

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, water parks 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.

As population grows the demand for access to public parks and open space increases. Many communities are planning and implementing projects that improve recreation spaces to meet increasing demands of their growing populations.

Historic Districts and Sites

Historic resources affect economic health, diversification, and growth opportunities. 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.

There are twenty-two National Register Historic Districts in the region. Seven of these are residential areas or neighborhoods, six are commercial or mixed-use areas, and the remainder includes two wood product mills, an airport, two farms, a fish hatchery, and numerous outdoor recreation areas.

Sites outside of historic districts include such diverse resources as unique industrial sites, burial grounds, farm buildings, covered bridges, and Native American encampments. Sites outside of historic districts can be listed individually on the

National Register, while city and county historic resource inventories identify additional sites of historic significance. While protection of many archeological sites requires that they not be publicly identified (e.g., tribal burial mounds), the State Historic Preservation Office inventory of established and potential sites of archeological significance in the region is substantial.

Public Higher Education

Universities

Oregon State University (OSU) in Corvallis and the University of Oregon (UO) in Eugene are significant economic forces within the region. Not only are they among the region's largest employers, their combined enrollment has a large economic and cultural impact on the region.

Enrollment: The fall 2009 combined headcount of the two area universities exceeded 44,000 (21,969 at OSU Corvallis Campus and 22,386 at UO) – representing a 6% increase over 2008 (Oregon University System). This considerable rise in enrollment may be attributable to high unemployment and residents who are preparing to re-enter the workforce when the national economy improves. In 2008-09, the FTE of OSU's Corvallis Campus was 19,220 while the FTE at UO was 21,679.

Oregon State University and the University of Oregon received over \$330 million in outside funding for research in 2008-09.

Outstanding Programs: The outstanding programs of these two research institutions also help put the region on the world map:

- ◆ OSU is home to nationally ranked programs in agriculture, forestry, conservation biology, fisheries and wildlife, and public health, as 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; planned growth areas include studies in sustainability, native cultures, eastern Asia, and entrepreneurship.

Research: Oregon State University and the University of Oregon also add significantly to the region through the advanced research and development carried on at their facilities and by their faculty. Research funding has seen a recent dramatic increase, in part due to American Recovery and Reinvestment Act funding awards.

- ◆ OSU research enterprise brought in a record \$252 million in overall funding during FY 2008-09, a \$21 million increase over the prior year. OSU's annual research portfolio, the strong majority of which is supported by federal agencies, has grown by about \$100 million since 2003 and represents an important part of the university's overall budget. OSU has by far the largest research program within the Oregon University System.
- ◆ The UO brought in just over \$79 million in grants and contracts, most of it from federal agencies, in FY 2008-09. These awards represented a 30% increase over the \$57.7

million earned the previous year. Along with a new high mark in research funding, UO also set a record in revenue from licenses on inventions and innovations produced in its labs. UO ranks among the top 25 U.S. universities for startup formation per research dollar.

- ◆ 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 (see “Innovation and R&D Centers” below).

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

The three community colleges in the region serve as life-long learning centers and house key economic development programs.

Lane, Linn-Benton, and the Oregon Coast Community Colleges serve as life-long learning centers and house key economic development programs. With a combined enrollment of over 64,000 students, these local colleges provide a variety of course offerings for those requiring workforce training, pursuing associate degrees, preparing for higher degrees, and for those wanting to pursue special professional or other personal interests. Lane Community College offers several unique and popular programs including Aviation Maintenance, Flight Technology and Culinary Arts.

Responsiveness to regional workforce needs has led to the creation of specialized training at the community colleges in nursing, welding, refrigeration, and a host of other high-demand disciplines. An ongoing challenge for the colleges has been keeping equipment used to train for these specialized fields, as well as in general education (e.g., sciences), up to date.

All of the region’s community colleges are working to position the region for the new economy -

- ◆ Oregon Coast Community College opened a new campus in Newport in 2009 from which it is expanding its marine programs along with sister facilities in South Lincoln and in Lincoln City.
- ◆ Linn-Benton Community College is completing construction and reconstruction of its science center and is contemplating development of an advanced transportation technology center.
- ◆ The Eugene Urban Renewal Agency recently agreed to transfer property in downtown to Lane Community College (LCC). LCC will develop a new, 80,000-square-foot downtown center on the site beginning in mid-2011. The new facility will provide affordable access to job-training and small business development education in an innovative “green” building with easy access to mass transit. LCC will continue its current offerings, plus add 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 recently been established in the region. These centers help place the region at the forefront of innovation in several specialty fields.

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.

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.

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.

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.

National Oceanic and Atmospheric Administration (NOAA) has selected the Port of Newport in Lincoln County to be the new home of the agency's Marine Operations Center-Pacific beginning in 2011. 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. This new NOAA research facility joins the existing **NOAA Pacific Marine Environmental Lab**, the **OSU Hatfield Marine Science Center**, and the **Northwest Fisheries Science Center** in creating a world-class marine-related research and development center in the region.

Health Care Facilities

Health care facilities are among the largest employers in the 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.

In Lebanon, Samaritan Health Services has begun development the College of Osteopathic Medicine of the Pacific Northwest (COMP), which will be the first new medical school to be built in Oregon in more than a century. Approximately 100 first-year medical students are scheduled to begin classes there in August 2011, followed by an additional 100 students for each of the subsequent three years.

The Lebanon campus is planned to eventually house other graduate medical education programs, a business incubator, a hotel and conference center, and related retail and support services. The active development of the bio-med business cluster in the Linn-Benton region is being fostered by the leadership of Samaritan Health. Additionally, Samaritan Health has facility improvements planned or underway at their Lebanon, Albany, Corvallis, Sweet Home, Lincoln City, and Newport facilities.

A veterans home with 150 to 200 beds is scheduled to be developed in Lebanon on a site owned by Samaritan Health Services during 2012. The facility will offer assisted living, skilled nursing, Alzheimer's and dementia care. About 215 full-time paid positions will be generated.

In 2008, Peace Health opened a second Sacred Heart campus in Springfield, east of I-5. This 432-bed facility is the largest hospital between Portland and San Francisco and is one of Oregon's busiest. Peace Health is now working toward a substantial renovation of Sacred Heart's current campus in Eugene's University District.

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. McKenzie-Willamette has expanded in Springfield and continues to operate as an investor-owned regional acute care center. The new Siletz Tribal Clinic, open to all residents, is the only Medicare provider in Lincoln County.



SECTION 6

Our Economy

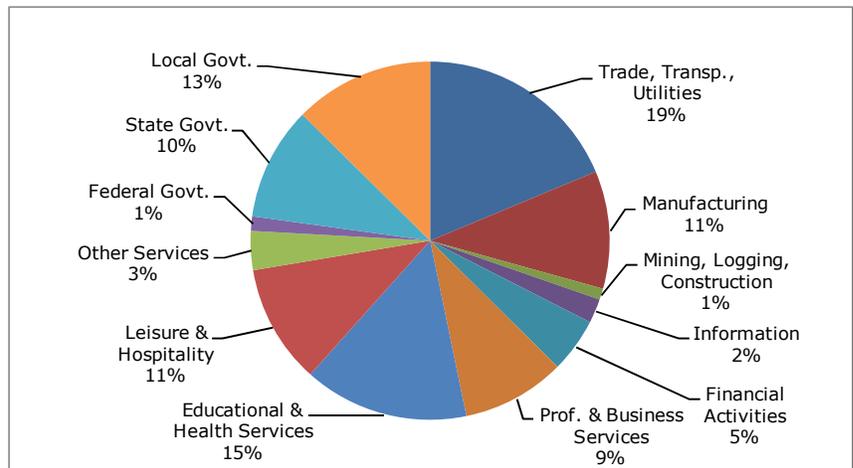
Economic Profile

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.

Industry Concentration in Region – 2009 Average



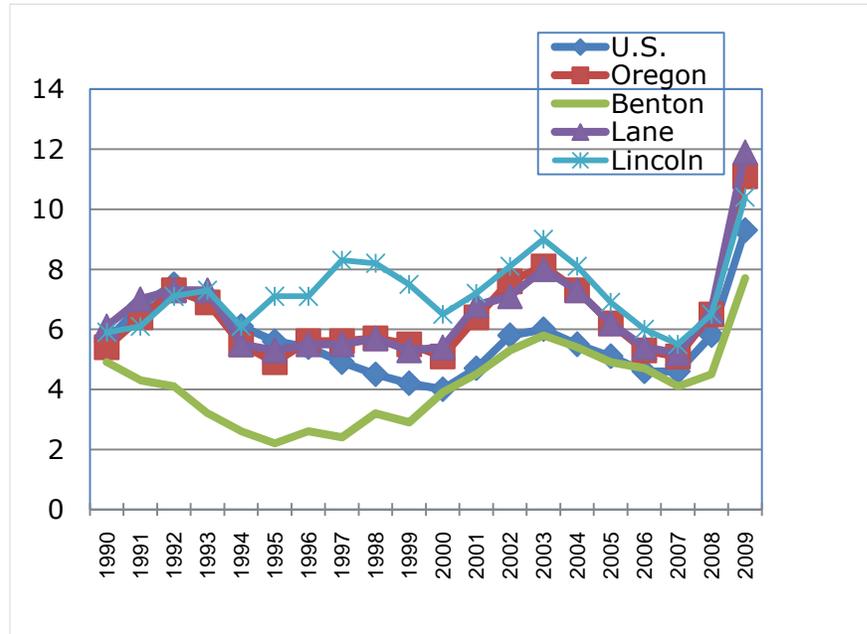
Employment and Unemployment

Nonfarm payroll employment statistics are by place of work and estimate how many jobs have been added or lost in an area. They measure an area's economic health and are based on a survey of employers.

Nonfarm payroll employment shows how many people were employed in a given area, on average, during the month.

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

Annual Average Unemployment Rates 1990-2009
Seasonally Adjusted



Oregon Employment Department

Average Annual Unemployment Rates
Seasonally Adjusted

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
U.S.	5.6	6.8	7.5	6.9	6.1	5.6	5.4	4.9	4.5	4.2
Oregon	5.4	6.4	7.3	6.9	5.5	4.9	5.6	5.6	5.7	5.5
Benton	4.9	4.3	4.1	3.2	2.6	2.2	2.6	2.4	3.2	2.9
Lane	6.1	7.0	7.3	7.3	5.5	5.3	5.5	5.5	5.7	5.3
Lincoln	5.9	6.1	7.1	7.3	6.1	7.1	7.1	8.3	8.2	7.5
Linn	7.4	8.6	9.6	9.1	7.1	6.1	6.7	7.1	8.8	7.8

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
U.S.	4.0	4.7	5.8	6.0	5.5	5.1	4.6	4.6	5.8	9.3
Oregon	5.1	6.4	7.6	8.1	7.3	6.2	5.3	5.1	6.5	11.1
Benton	3.9	4.5	5.3	5.8	5.4	4.9	4.7	4.1	4.5	7.7
Lane	5.4	6.8	7.1	8.0	7.3	6.2	5.4	5.2	6.6	11.9
Lincoln	6.5	7.2	8.1	9.0	8.1	6.9	6.0	5.5	6.5	10.4
Linn	6.6	7.7	9.0	10.1	9.1	7.5	6.6	6.3	7.6	13.7

Oregon Employment Department

**Recent Unemployment Rates
Seasonally Adjusted**

Highlight indicates rate is 1% or more above U.S. Rate

	Jan '10	Feb '10	Mar '10	Apr '10	May '10
U.S.	9.7	9.7	9.7	9.9	9.7
Oregon	10.7	10.5	10.6	10.6	10.6
Benton	7.3	6.7	7.5	7.5	7.0
Lane	10.7	10.0	10.6	10.9	10.7
Lincoln	9.6	9.4	10.2	10.6	10.8
Linn	12.9	12.3	12.9	12.9	13.2

	Jan '09	Feb '09	Mar '09	Apr '09	May '09	Jun '09	Jul '09	Aug '09	Sep '09	Oct '09	Nov '09	Dec '09
U.S.	7.7	8.2	8.6	8.9	9.4	9.5	9.4	9.7	9.8	10.1	10.0	10.0
Oregon	9.9	10.6	11.2	11.5	11.6	11.6	11.4	11.2	11.0	10.9	10.7	10.6
Benton	7.1	7.5	7.8	8.1	8.2	8.0	8.3	7.7	7.5	7.8	7.5	7.5
Lane	10.7	11.3	12.1	12.4	12.8	12.6	12.1	12.1	12.1	12.1	11.5	11.6
Lincoln	9.5	10.1	10.7	10.8	11.2	10.9	10.5	10.2	10.5	10.6	10.0	9.9
Linn	11.8	12.8	13.4	13.8	14.6	14.2	14.0	14.2	14.3	14.2	13.5	13.4

	Jan '08	Feb '08	Mar '08	Apr '08	May '08	Jun '08	Jul '08	Aug '08	Sep '08	Oct '08	Nov '08	Dec '08
U.S.	5.0	4.8	5.1	5.0	5.4	5.5	5.8	6.1	6.2	6.6	6.9	7.4
Oregon	5.2	5.2	5.3	5.4	5.7	6.0	6.3	6.7	7.1	7.7	8.3	9.1
Benton	3.8	3.7	3.9	3.9	4.0	4.1	4.3	4.6	4.5	5.3	5.6	6.4
Lane	5.2	5.0	5.4	5.3	5.8	5.8	6.5	6.9	7.5	8.1	8.5	9.5
Lincoln	5.5	5.4	5.6	5.5	5.7	5.9	6.3	6.8	6.8	7.6	7.9	8.6
Linn	6.2	6.0	6.4	6.2	6.7	7.0	7.4	7.8	8.4	9.1	9.5	10.6

Oregon Employment Department

Unemployment Moderates: Data for the most recent two year period (January 2008-2010) indicates a loss of 6,780 nonfarm jobs in the region. Unemployment rates are moderating in all counties for the region, with recent jumps ranging between two and three percent.

Benton County typically enjoys one of the lowest unemployment rates in Oregon, with an annual average unemployment rate of 7.7% in 2009. Benton's January 2010 rate of 7.4% is slightly higher than one year ago, but down from the high of 8.3% in July 2009. There were 1,780 fewer nonfarm jobs in Benton County in January 2010 than in January 2009.

Lane County 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 it highest level of the year at 13.5%. The Lane County unemployment rate dropped to 11.9% for January 2010. There were 5,000 fewer nonfarm jobs in Lane County in January 2010 than in January 2009.

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. Lincoln's January unemployment rate was 11.7%, but this rate does not factor in fishing (which is considered an agricultural

activity). There were 200 more nonfarm jobs in Lincoln County in January 2010 than in January 2009.

Linn County unemployment rates historically exceed national rates by 1% or more. Recent data relays a high level of economic distress, with unemployment rates growing rapidly and then falling slightly. While the 2008 Linn County annual average unemployment rate was 7.6%, the county's 2009 rate was almost double at 13.7%. There were 2,340 fewer nonfarm jobs in Linn County in January 2010 than in January 2009.

Traditional Sectors of the Economy

NAICS: *Measuring employment has changed in recent years as a result of the new North American Industry Classification System (NAICS), which replaces the U.S. Standard Industry Classification (SIC) system.*

The following “Traditional Sectors of the Economy” data and descriptions were prepared by the State of Oregon Employment Department for this strategy. The tables immediately below provide regional traded sector data for employment, wages, and growth projections. Information in these tables is reviewed in more detail under the following narrative description of each of the eight NAICS industry sectors (see text box for NAICS explanation).

Regional Employment in Traditional Sectors

	2005	2006	2007	2008	2018 Est.	2008-2018 Jobs	2008-2018 Change
Forest Products	9,590	9,304	8,801	8,012	7,627	-385	-4.8%
Fisheries 1/	103	82	76	120	120	0	0.0%
Agriculture 2/	5,840	5,930	5,681	5,700	6,010	310	5.5%
High Tech	6,456	5,915	5,797	5,022	5,197	175	3.5%
Software	1,518	1,799	2,093	2,196	2,384	188	8.6%
Tourism	24,136	24,781	26,037	26,616	29,293	2,677	10.1%
Metals	3,493	3,702	3,819	3,872	3,851	-21	-0.5%
Government 3/	51,880	52,230	53,140	54,820	59,412	4,592	8.4%

1/ Includes only covered employment in fishing.

2/ Oregon Employment Department estimate includes covered and noncovered employment for 2005-08. 2008-2018 percent growth is based on covered employment only and is not directly comparable to earlier years.

3/ Government includes tribal employment.

Average Annual Wages in Region for Traditional Sectors

	2005	2006	2007	2008	Statewide 2008
Forest Products	\$40,397	\$40,249	\$41,203	\$41,178	\$39,789
Fisheries 1/	\$40,390	\$37,788	\$37,321	\$38,116	\$44,426
Agriculture /2	\$24,091	\$25,664	\$26,406	\$27,351	\$23,596
High Tech	\$73,124	\$75,352	\$77,919	\$81,027	\$89,442
Software	\$63,713	\$63,222	\$67,219	\$69,940	\$88,811
Tourism	\$12,864	\$13,371	\$13,788	\$14,002	\$16,415
Metals	\$47,474	\$54,748	\$53,989	\$53,318	\$50,347
Government 3/	\$36,062	\$37,259	\$38,630	\$39,692	\$43,137

1/ Includes only covered employment in fishing.

2/ Oregon Employment Department estimate includes both covered and noncovered employment. Projection is based only on covered employment.

3/ Government includes tribal employment.

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 most of manufacturing.

The four counties of the region each have at least some employment in the forest products sector. Between 2005 and 2008, forest products employment dropped 1,578 to 7,627. Losses continued into 2009, but employment stabilized during the second half of the year. Industry wages tend to be high, with a regional average of \$41,178, compared with the all-industry annual average of \$34,813.

Employment in the forest products sector is expected to decline slightly between 2008 and 2018 – by 4.8% or 385 jobs. Continued technological advances will likely make the industry less labor intensive.

Fisheries

Fisheries employment in the region is primarily in coastal Lincoln County – especially in Newport, with a few additional jobs in Lane and Benton counties. 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. 1999 legislation excused most fishermen from unemployment insurance coverage – the primary source of employment data. The average number of jobs in aquaculture and fishing covered by unemployment insurance dropped from 126 in 2001 to 103 in 2005, and then increased to 120 in 2008. The changes could be from the number of fishermen actually working or from the number choosing to maintain unemployment insurance coverage – or a combination of the two. The total number of commercial fishermen in the region was estimated at 578 in 2008.

Fishing employment in the short run is tied to harvests and 2008 brought excellent shrimp, groundfish, whiting, and sardine harvests. The value of the total harvest was \$143 million—the highest since 1988 after adjusting for inflation. Although commercial salmon harvests have been low since 2006, prices have increased and the income generated from salmon (\$4.4 million) was above the average for the 1990s. In addition, Oregon fisherman received about \$12.7 million from August 2008 through June 2009 through the Salmon Disaster Relief Program.

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 groundfish over fished and restricted harvests to rebuild their stocks. These restrictions will probably continue.

Fishing will continue to be an important source of income in the region. In 2008 the landed value of fish in Lincoln and Lane Counties was about \$32.7million – with about 99 percent of that landed in Lincoln County. That is about one-fourth of Oregon’s total. Average covered wages in the industry are about \$50,000 per year and have risen sharply in the past few years. It is estimated that total employment in the region will remain stable from 2008 to 2018.

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.

Linn County has the most agricultural employment of the four counties in the region. In 2008, Linn County’s annual agriculture employment was 2,390 and total gross farm sales were \$291 million. Linn County, also known as, “the grass seed capital of the world”, is not so subtle about the county’s largest crop. Linn County does produce more grass seed than any other county in Oregon. In fact, 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.

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 percent 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 2008, Lane County’s annual agriculture employment was 2,140.

Benton County’s gross farm sales were less than Lane County’s sales in 2008; Benton County had \$109 million in gross farm sales. Benton County produces a number of commodities. In 2008 the largest commodities were tall fescue, dairy products, annual ryegrass, and orchard grass. Benton County’s annual agriculture employment was 930.

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.

In 2008, the regional average annual wage for crop production was \$27,624, above the statewide average of \$22,978. For animal production the average wage in the region was \$25,964, slightly below the statewide average of \$28,680.

High Tech (less software)

The high-tech sector is made up of computer and electronics manufacturing and of computer systems design and related services. All four counties have at least some employment in the sector, with Benton County leading the way – due mostly to the presence of Hewlett-Packard. Lane County lost a major employer in this sector when Hynix closed its semiconductor factory in 2008. Hewlett-Packard has had several publicized rounds of layoffs in recent years.

After growing rapidly in the 1990s, high tech declined in the region when the recession started in 2001. After stabilizing, it lost 1,259 jobs between 2005 and 2008. Much of the loss can be attributed to the closure of the Hynix semiconductor factory in Eugene. Jobs in this sector are generally high paying, with annual average wages at \$81,027 in 2008, compared with an average annual wage for all industries of \$34,813.

The high-tech sector is expected to increase slightly in the region over the next 10 years – gaining 175 jobs or around 3.5% of current employment levels. Continued improvements in production efficiency and competition from domestic and international companies are expected to limit employment growth in this sector over the next ten years.

Software

Software in the region is characterized by several, mostly small software publishers. There were 87 locations employing 2,384 in 2008. Two of the larger software publishers are Symantec in Springfield and Tripod Data Systems in Corvallis.

Software in the region grew by 866 jobs between 2005 and 2008 and employment levels have been maintained during the current recession. Wages in software are generally high. Average annual wages in 2008 were \$88,811, compared with an average annual wage for all industries of \$34,813.

Software is expected to add 188 jobs for a growth rate of about 8.6% over the next 10 years.

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. Dean Runyan Associates estimated the region received about \$1.2 billion in travel spending in 2008 and that travel provided about 17,000 jobs. 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.

Employment in leisure and hospitality rose slightly in 2008, mainly prior to the recession's deepening at the end of the year. The industry provided 26,683 jobs in 2008 – nearly 11% of total covered employment in the region. The industry is seasonal and was negatively affected by the recent recession; estimated employment had dipped to 24,280 by December 2009.

Leisure and hospitality is relatively more important in Lincoln County than the overall region, where it provides about 24 percent of the covered jobs. The average covered wage in the industry was about \$14,100 per year in 2008 in the four-county region. This average wage was much lower than the regional average of about \$35,900. 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.

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 a one-percent lodging tax to promote tourism. This 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 nearly 2,100 in 2008. In fact, Linn County accounted for 22 percent of primary metal manufacturing employment statewide in 2008. Lane County makes up the small remainder of the region's primary metal manufacturing, employing less than 100 in 2008. Benton County and Lincoln County did not have any primary metal manufacturing employment in 2008.

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 \$65,022 in 2008, 81% higher than the region's average wage of \$35,876.

Fabricated metal manufacturing is a slightly smaller industry than primary metals, employing 1,712 in the region during 2008. Lane County made up 70% of the region's employment in the

industry. Linn County comprised 28% of the region's employment while Benton and Lincoln Counties made up the small remainder. The average annual wage in fabricated metals was \$38,551 in 2008, higher than the \$35,876 average paid across all industries, but not nearly as high as the average wages in the region's primary metals industry.

Overall metals manufacturing employment is projected to be quite flat in the region from 2008 to 2018, but it is a tale of two industries. Primary metal manufacturing is projected to decline by 3% over the ten-year period while fabricated metals manufacturing is projected to grow by 5%. The projections place metals manufacturing among one of the slower growing industries in the region - across all industries the region's employment is projected to grow by 9% between 2008 and 2018.

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 21% of the total nonfarm employment. Federal government employment (1.1%) in the region is actually lower than the statewide average of 1.7%. Local government in the region accounts for 11% of nonfarm employment, matching the statewide percentage.

State government is the sector where the region differs significantly from the statewide pattern. State government makes up 9% of the region's employment, twice the statewide percentage of 4.4%. 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 were \$36,692 in 2008, lower than the statewide average of \$43,137. The regional average wages were lower than statewide averages for federal, state, and local government.

The government sector is projected to grow 8% in the region from 2008 to 2018. Statewide, employment growth in the public sector is projected to grow at a similar pace, 8% over the 10-year period.

Potential Business Clusters for the Region's Future

The following narratives on potential business clusters that could be important to the region's economic future were prepared in consultation with the State of Oregon Employment Department. Views expressed by members of the economic committees have been incorporated to help relay the potential of each cluster.

Transportation Components

Recreational vehicle manufacturing in the region includes production of campers and motor coaches. Motor coach manufacturing employment dropped from almost 3,000 people in 2008 to about 500 people today. However, with the baby-boom generation entering its retirement years, national demand for recreational vehicles is expected to rebound from the recession somewhat over the next ten years.

Bicycles: Over 100 people are employed by area bicycle and bicycle parts manufacturers. Eugene-based Burley Design, often included in Oregon Business magazine's list of best places to work, joins a host of other manufacturers that help to put Oregon on the bicycle manufacturing map. Rising transportation costs and sustainability agendas both appear to influence demand for the typically higher-end cycling systems produced in the region.

Electric vehicles and their parts are emerging as potential components of the region's future. For instance, EnerG2 is currently siting its carbon electrode battery material manufacturing operations in Albany while electric car manufacturer Arcimoto is moving into the build stage on its newest prototype.

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 dwindled 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.

Health

A cluster of activities related to human health services, facilities, research, and products appear to be forming in the region. Work to develop a bio-science consortium has helped to articulate and strengthen the region's cluster of manufacturers producing pharmaceutical and other medical products. As described in Section 5, the expansion and development of health care facilities includes the underway development of a new College of Osteopathic Medicine and a new veterans home. The region is interested in building on these existing and emerging strengths.

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 electric vehicle and hybrid 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 (see descriptions provided in Section 5, Our Community Resources) 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.



SECTION 7

Challenges and Opportunities

Identifying Strengths, Weaknesses, Opportunities, and Threats

The Cascades West Economic Development District (CWEDD) discussed the state of the region with the Lane Economic Committee and the Oregon Cascades West COG Community and Economic Committee as well as during its June 2010 regional economic development forum.

Our People

- ◆ The have-have not divide continues to grow. There are over 90,000 individuals living below poverty in the region and over 35,000 people in the region are currently identified as unemployed.
- ◆ Areas of the region that are losing families to emigration are experiencing shifts in their education systems and labor base.
- ◆ Continued growth through in-migration is expected to change community structures and support systems.
- ◆ Significant increases in enrollment in the public higher education institutions of the region are expected to lead to a stronger future workforce.

Our Natural Systems

- ◆ Marine reserve pilots on the Coast and the location of NOAA's research facility are expected to create additional focus on the region's research and development expertise.
- ◆ Sustainable development strategies and "green jobs" are increasingly supported as a preferred base that future economic development opportunities could grow from.
- ◆ Potential implications of climate change models which forecast that the natural resource base of the region may shift in the next 30 years need to be clarified.

Our Community Resources

- ◆ Water quantity and water health are major concerns for the economic future of the region.
- ◆ The variety of viable alternative energy opportunities available within the region continues to expand. Creating a center for energy-related businesses would help solidify this opportunity as would support of emerging wave energy technologies.
- ◆ Broadband has become an essential part of a community's infrastructure, influencing industrial development options.
- ◆ The overall transportation network of the region continues to suffer from deterioration and to operate at over capacity despite significant recent reinvestments.
- ◆ Investment in marine-related facilities at the region's ports will be important to harness new R&D opportunities and help build a stronger, more diverse, economic base.
- ◆ Existing research and development facilities, innovative businesses, and new innovation centers tied to OSU and UO will help the region reach new economic opportunities.
- ◆ There are opportunities to diversify the regional economy by building on recent bio-med facility locations and working with industry and R&D partners.

Our Economy

- ◆ The depth of the current economic downturn has led to unemployment rates which have not been seen for more than two decades. Full recovery from this downturn will be longer than after most economic cycles.
- ◆ Averages wages in certain sectors of the region remain well below state and national levels.
- ◆ Commercial and residential construction continues to be weak. These markets could require an extended time period to reach equilibrium.
- ◆ Housing costs remain high relative to wage levels.
- ◆ Loss of employment in certain industries, such as transportation equipment, is likely to be permanent. Displaced workers will need new training and new direction.
- ◆ Regional strengths in innovation and entrepreneurship could help the region build a more resilient future economy. Flexible capital, strong business development support, business incubation facilities, flexible space for emerging businesses and overcoming industrial site development barriers will be important in harnessing these opportunities.



SECTION 8

Regional Vision and Goals

Our Vision

This vision is based on input from private and public sector participants in regional planning activities from 1995 to the present.

The Benton-Lane-Lincoln-Linn region will guide its growth to create a sustainable and demonstrably superior place to live and do business that respects the goals and capacities of each community. The region will nurture and support existing and new businesses to establish a multi-dimensional economy that provides a wide range of job opportunities to allow people to enjoy the quality of life they desire.

The high quality of life that we envision will be found in all areas of the region, including rural communities. A high quality of life means quality job, educational, and housing opportunities; health care, human services cultural and recreational offerings; and, open space and a healthy natural environment. Our rural communities will have strong institutions, strong local leadership, and strong local identities. The economies of our rural communities will be vital and diversified, including non-traditional businesses, value-added businesses, home-based businesses, and professional service firms. Linkages between communities, especially connections between rural and urban areas, will be improved through telecommunication linkages, improved highways, and other transportation options.

Key elements of the regional vision include:

- ◆ **A diversified economy affording a wide range of employment opportunities providing stable, family wage jobs**, including support for:
 - A strong private sector
 - A focus on traded-sector employment
 - Value-added employment in natural resource sectors, such as agriculture, fisheries, and forest products
 - Industries such as knowledge-based, software, metals, biotechnology, and emerging industries
 - Outstanding tourism products, including facilities and attractions
 - Economic revitalization of distressed and/or rural communities
 - Successful small businesses and cottage industries

- An adequate level of technical assistance and support to entrepreneurs and emerging businesses
 - Establishing networked business clusters
 - Accessible e-commerce technology for small business
 - Vibrant port and special districts as economic partners
 - Improved linkages from the coast to the Willamette Valley
 - An increase in higher education's capacity to develop emerging businesses and industries
 - A public-private model that successfully transfers university-based research to the private sector
 - Business and labor adjusting to changes in the economy
 - Outreach to special populations, such as the disabled, seniors, youth, minorities, unemployed and underemployed
 - Development of an appropriate inventory of industrial parks, sites and facilities
 - State certification of shovel-ready industrial sites
 - Manufacturing spaces such as business incubators, flexible buildings and commercial kitchens that meet the needs of start-up and emerging businesses
 - Revitalized downtown business districts, including redevelopment and reuse of properties
- ♦ **Lifelong education and workforce training opportunities**, including:
- Quality K-12 public education
 - An outstanding higher education system
 - Accessible and superior community college facilities and programs
 - Strong, active partnerships between educational providers, businesses, and non-profits
 - Stable, adequate funding across the continuum of education and training systems
 - Multi-lingual delivery of education and training
 - Improved opportunities for the working poor and dislocated workers to access education and training services
 - Enhanced school-to-work programs
 - Training that addresses workforce needs
- ♦ **Sustainable natural resources**, including:
- Balancing the multiple, sometimes conflicting, demands on natural resources
 - High-quality water
 - High-quality air
 - Appropriate use of limited land and protection for resource lands and soils
 - Restoration of anadromous fisheries for commercial and recreational use based on proven science
 - Complying with Section 4D Rules of the Endangered Species Act
 - Value-added agriculture, fisheries, and forest products
 - Recycling and use of alternative fibers
 - Preserving our natural resource industries
 - Coordination of university initiatives to promote sustainable natural resource programs

- Encouraging sustainable alternative fuels and energy sources, especially those that generate new employment
- Addressing wetlands and brownfield issues on industrial properties
- Preparedness for natural disasters
- ♦ **An integrated infrastructure** that includes:
 - Well maintained, up-to-date water, sewer and storm water drain infrastructure systems, particularly to meet new regulations
 - Available, affordable telecommunications systems offering connectivity via television, cable, telephone, satellite, computer data line, wireless, and fiber optics for business and residential needs
 - Adequate and stable energy supplies
 - Coordination and advocacy among regional entities, such as the RIB, CWEDD, Area Commissions on Transportation, Fiber Optic Consortia and other entities to improve infrastructure networks and affordability, especially in rural areas
 - Well-maintained State and county highways and roads
 - Multi-modal and public transportation options, including air service, short-line rail, and water transportation, especially in rural areas
 - Assistance to smaller cities in addressing regulatory changes
 - Technical assistance for capital improvement planning and construction
 - Ongoing training for individuals involved in infrastructure maintenance, planning, construction, etc.
 - Regional coordination in the planning and construction of infrastructure
 - Adequate drinking water storage and supply
 - Coordinated regional telecommunications infrastructure planning and integration with other community needs and initiatives

Coordinated efforts that provide an integrated approach to problem solving and that focus the efforts of a variety of individuals, communities, and agencies will be needed to move the region toward this vision. This coordination will entail:

- ♦ Public-private partnerships
- ♦ Linkages between academic research and the private sector
- ♦ Local, regional, state, and federal collaborations

Also important are:

- ♦ Fostering the participation and contribution of the region's diverse citizenry
- ♦ Supporting a balanced and fair tax structure
- ♦ Encouraging well-managed economic growth
- ♦ Increasing accessibility of government programs and initiatives to all of the region's residents
- ♦ Removing barriers to the growth of business
- ♦ Revitalizing traditional downtown commercial core areas

Our Goals

The following six goals refine the regional vision and provide a framework for shaping the distinct work plans and long-term investment strategies of the Cascades West Economic Development District, Cascades West Community and Economic Development Committee, and Lane Economic Committee. It is anticipated that these goals also provide a sound basis for local and state-wide policy development and planning. Policy-level explanations of why the goal is considered important and examples of how the goal could be addressed follow each goal statement.

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

Considerations: The region must both support existing businesses and industries and be prepared to take advantage of new opportunities. Individuals must be supported in their efforts to improve their skills, to have access to a variety of job opportunities, and to start their own businesses.

Examples of activities that support this goal:

- ◆ Enhance access to capital, both private and public
- ◆ Training for professional and technical primary jobs
- ◆ Enhance value-added production and niche marketing
- ◆ Support for ports and special districts
- ◆ Support for the activities of business incubation centers, entrepreneurs, small business development centers, and economic development partnerships, that help local businesses meet their needs, resolve issues, and expand job opportunities
- ◆ Create new models to commercialize research
- ◆ Reach out to special populations including the disabled, seniors, minorities, unemployed, under-employed and youth
- ◆ Address barriers to business location and expansion
- ◆ Develop one-stop centers to link interested small businesses with various sources of economic development support
- ◆ Develop a regional economic identity and promote awareness and advocacy for the region's economic quality of life that continues to support and attract the investment and innovative and entrepreneurial talent and builds on our dynamic and diverse economic community by -
 - Partnering with local business and economic development organizations to develop and implement an on-going campaign that will promote the region's economic identity and successes, both internally and externally
 - Promoting the region's strong willingness and ability to mentor and coach entrepreneurs and businesses, and recognize the successes that grow from within this network
 - Promoting and celebrating the region's creative people who find success elsewhere and find bridges for them to contribute back to our community

- ◆ Support and attract various target industries to continue the development of wealth-generating sectors that have built a strong economic foundation for our region and have complemented the region's quality of life including transportation manufacturing, wood manufacturing, health care, and construction
- ◆ Support development and growth in successful and emerging opportunity areas such as health/wellness, advanced manufacturing, software, clean tech, renewable energy, biomedical, research & development

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

Considerations: Entrepreneurs continue to be a significant economic generator in the region as 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 that range from globalization to shifting market structures, our regional economy will require a continued in-flux of fresh energy from new and existing businesses. To make an economic impact our approaches to supporting entrepreneurs will need to be pro-active, responsive, flexible and innovative – in a word, entrepreneurial.

Examples of activities that support this goal:

- ◆ Establish networks of business clusters
- ◆ Create new models to transfer university research to entrepreneurs
- ◆ Develop facilities that support the needs of emerging businesses such as incubators, commercial kitchens and flexible manufacturing buildings
- ◆ Expand the availability of business development assistance
- ◆ Form start-up capital, micro-enterprise financing and venture capital funds
- ◆ Identify and promote emerging business sectors
- ◆ Implement enterprise development efforts targeted at start-up businesses
- ◆ Support potential entrepreneurs as they are displaced in workforce reductions

Goal 3: Support infrastructure assistance to communities.

Considerations: There is an ongoing shortage of industrial and business park space in our region, especially larger sites. Some communities must address compliance issues that require improvements to water and sewer facilities. While the State has funding available for some types of infrastructure projects, there are still funding gaps. In addition, some rural communities lack full-service infrastructure (water, sewer, telecommunications, streets, natural gas) to residential, commercial and industrial sites.

Examples of activities that support this goal:

- ◆ Provide leverage to access other funding sources
- ◆ Support for the development of advanced telecommunications and access to existing fiber optic infrastructure
- ◆ Development of fully-served industrial sites and business parks, including redevelopment of underutilized sites
- ◆ Development of transportation options, including rail, intermodal rail, and air service
- ◆ Promote and build on the Region's transportation, distribution and logistics advantages.
- ◆ Streamline the regulatory processes to assist with site selection and development.

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

Considerations: Communities often lack the facilitation resources needed to build consensus for their community development agenda and to identify how to move components of that agenda forward. Smaller communities also often need technical assistance to access State and private funding sources for infrastructure improvements and other community development priorities.

Examples of activities that support this goal:

- ◆ Technical assistance to develop community projects
- ◆ Technical assistance to smaller communities for accessing funding sources
- ◆ Creation of and updates to community development plans
- ◆ Development of project-specific action plans
- ◆ Support in determining how to address new governmental regulations
- ◆ Assist communities in identifying and addressing community facility needs such as health clinics, housing, and tribal facilities
- ◆ Planning and implementing downtown revitalization efforts

Goal 5: Partner to improve workforce training and education.

Considerations: There is an ongoing need to increase the access to and the capacity of workforce training efforts. Career planning that links specific training to a range of job opportunities is necessary to show people that there are more opportunities available than just obtaining an initial job. Access to training opportunities in rural areas is limited and there are additional issues surrounding access (transportation, available child care, etc.). A lack of trained health care workers is a growing problem, especially in rural areas.

Examples of activities that support this goal:

- ◆ Expand training opportunities to rural areas
- ◆ Initiate new training programs

- ◆ Increase linkages between new and expanding businesses and workforce training entities and educational institutions
- ◆ Meet the needs of displaced workers with entrepreneurial interests
- ◆ Convene industry panels to design and evaluate curricula to ensure that local training programs meet industry needs

Goal 6: Support the needs of rural areas.

Considerations: All of the Goals above are applicable in rural areas and communities. Small communities may lack the local capacity and funding resources necessary to undertake large projects, such as infrastructure upgrades. Local access to training and education opportunities is important, but often limited. Lack of transportation options can hinder access to education, work, and services for individuals in rural communities. Often, a lack of serviced industrial sites reduces any opportunity for development, redevelopment, or expansion of local industries.

Examples of activities that support this goal:

- ◆ Provide technical assistance to develop and administer projects
- ◆ Development of infrastructure
- ◆ Support for business development and management programs
- ◆ Collaboration and coordination among communities to address needs
- ◆ Enhance health care facilities and services
- ◆ Increase transportation options
- ◆ Provide outreach to existing and emerging entrepreneurs in smaller communities
- ◆ Identify and assist in developing business niches that would be attracted to the environment of smaller communities
- ◆ Identify and assist in developing desired community facilities, such as libraries, community meeting space, tribal facilities and recreational amenities

Economic Development Partners

The following outline of those involved in regional economic development efforts is not exhaustive. However, it does provide an indication of the multiple facets and many players involved in economic development in the region. Active input, communication, collaboration, and cooperation among these entities is a cornerstone of developing and implementing the CWEDD regional economic development strategy.

Comprehensive Economic Development Planning

- ◆ Cascades West Economic Development District, U.S. Department of Commerce Economic Development Administration
 - Lane Council of Governments
 - Lane Economic Committee
 - Oregon Cascade West Council of Governments (OCWCOG)
 - OCWCOG Community and Economic Development Committee
- ◆ Oregon Business Development Department
- ◆ *Each county, city, tribe, and port (identified in Section 2) must address economic development goals in their localized comprehensive planning efforts.*

Jurisdictions

- ◆ Counties: Benton, Lane, Lincoln, Linn
- ◆ Cities: 36 jurisdictions (see Section 2 for full list)
- ◆ Ports: Alsea, Newport, Siuslaw, Toledo
- ◆ Tribes: Confederated Tribes of Coos, Lower Umpqua and Siuslaw; Grand Ronde; Siletz
- ◆ *The region also includes multiple water districts, Soil and Water Conservation Districts, fire districts, and watershed councils.*

Lead Economic Development Contacts

- ◆ Albany-Millersburg Economic Development Corporation
- ◆ Corvallis-Benton Chamber Coalition
- ◆ Lane Metro Partnership
- ◆ Lincoln County Economic Development Alliance
- ◆ North Santiam Economic Development Corporation
- ◆ Oregon Business Development Department
- ◆ Siletz Tribal Business Development Corporation
- ◆ Sweet Home Economic Development Group
- ◆ *County, city, tribe, port, and chambers of commerce may have staff that serves as a lead local contact.*

Business Start-up Support

- ◆ Business Enterprise Center
- ◆ Lane Community College Small Business Development Center
- ◆ Lane Micro Business
- ◆ Linn-Benton Community College Small Business Development Center
- ◆ Oregon Coast Community College Small Business Development Center
- ◆ Senior Corps of Retired Executives (SCORE)

Business Development Funds

- ◆ Cascades West Financial Services
- ◆ Confederated Tribes of Siletz Indians
- ◆ Lane Council of Governments
- ◆ Linn-Benton MicroBusiness
- ◆ Oregon Business Development Department
- ◆ Oregon Cascades West Council of Governments Lending Services
- ◆ Siletz Tribal Business Corporation
- ◆ *Some county, city, urban renewal, and port authorities provide local business development loan pools.*

Workforce Training

- ◆ Community Services Consortium
- ◆ Lane Workforce Partnership
- ◆ Lane Community College
- ◆ Lane Workforce Investment Board
- ◆ Linn, Benton, Lincoln Workforce Investment Board
- ◆ Linn-Benton Community College
- ◆ Oregon Coast Community College
- ◆ Oregon Employment Department

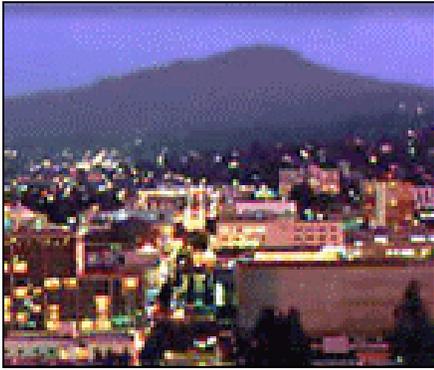
Tourism

- ◆ Albany Visitors Association
- ◆ Central Oregon Coast Association
- ◆ Travel Lane County
- ◆ Corvallis Visitors Bureau
- ◆ Oregon Tourism Commission
- ◆ Willamette Valley Visitors Association
- ◆ *Community visitor programs, chambers of commerce, and multiple other non-profit groups oversee local tourism development efforts.*

Other Entities Involved in Economic Development

- ◆ Chambers of Commerce typically play multiple roles in supporting business development in their communities.
- ◆ Cities provide infrastructure systems, development review, obtain site development funds, and play multiple other roles in implementing local economic development goals.
- ◆ Community colleges partner on regional and local economic development strategies and project implementation in addition to their small business development center and training work.
- ◆ Oregon State University and the University of Oregon have served as economic development partners by offering technology transfer programs and supporting regional business development and recruitment efforts.
- ◆ Community Response Teams in some communities shape and implement local community and economic development priorities.
- ◆ Metropolitan Planning Organizations in the Eugene / Springfield and Corvallis MPAs provide planning and project coordination.
- ◆ Cascades West Area Commission on Transportation advises the Oregon Transportation Commission on regional issues and priorities. The Lane County area of the region is currently evaluating establishment of an ACT.

- ◆ Local governments and the Oregon Department of Transportation provide and maintain critical transportation connections.
- ◆ Rail providers, including short line operators, provide an important part of community and economic infrastructure.
- ◆ State of Oregon: The Governor's office and multiple State agencies work to address various issues and needs, provide funding assistance, and implement statewide programs.
- ◆ Utility providers (electric, natural gas, communication systems) often provide staff support and partner in regional and local economic development efforts.
- ◆ Watershed councils provide a forum for the multiple resource interests in their shed and undertake projects to improve natural systems.
- ◆ St. Vincent DePaul, a non-profit organization, works to address a variety of community and social concerns while, often concurrently, implementing job creation and business development efforts.



SECTION 9

Cascades West Economic Development District Work Program

Organizational Structure

Overview

Cascades West Economic Development District (CWEDD) brings together local elected officials, community improvement organizations, business community members, and State and federal resource providers to address community and economic development issues. Its mission is to create jobs and to enhance the livability of the communities in Benton, Lane, Lincoln, and Linn Counties. The CWEDD:

- ◆ Advocates the economic development interests of the region;
- ◆ Promotes coordination, cooperation, and communication among economic development groups and organizations;
- ◆ Provides access to financial incentives for business and industry in the region;
- ◆ Imports outside capital into the region for economic development and public works projects;
- ◆ Conducts research and development to identify new economic opportunities in the region; and
- ◆ Provides supporting services to others focused on business and industrial expansion.

The CWEDD is a cooperative partnership between the Oregon Cascades West Council of Governments (CWCOG) and the Lane Council of Governments (LCOG). The U.S. Department of Commerce Economic Development Administration (EDA) designated CWEDD as the Economic Development District for the BL3 region in 1983. Both COGs provided community and economic development assistance in their respective areas prior to the establishment of the CWEDD, with CWCOG serving Linn, Benton, and Lincoln County communities as a designated Economic Development District since 1977.

CWEDD Board and Committees

A twenty-member Board oversees the activities of the CWEDD. CWEDD Board members include the executive committees of Lane and Cascades West Council of Governments and others appointed by the COG Boards that represent public, private, and non-profit stakeholders.

Two committees are appointed by their respective Council of Governments' Board of Directors to guide development and implementation of the regional economic development strategy and work program in their respective areas:

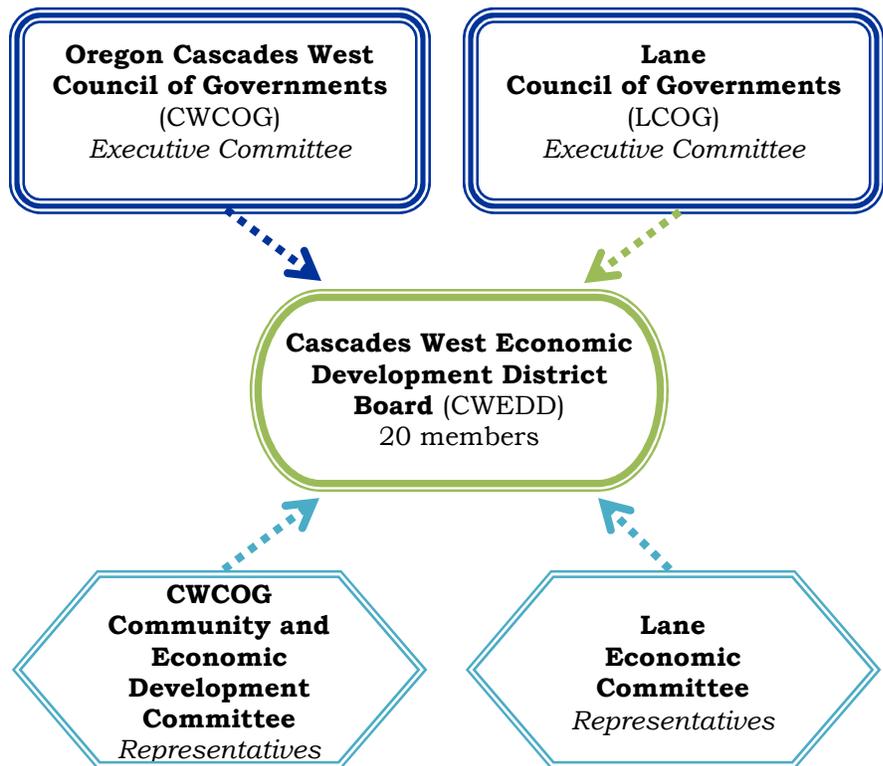
- ◆ CWCOG Community and Economic Development Committee
- ◆ Lane Economic Committee

These committees identify issues and opportunities, assist in framing the regional vision and goals, provide policy recommendations to the COG Boards and the CWEDD Board, and assist the staff of the Cascades West and Lane Council of Governments in work plan implementation.

The activities of the CWEDD are carried out through the professional staff of:

- ◆ Oregon Cascades West Council of Governments (CWCOG) and
- ◆ Lane Council of Government (LCOG).

Representatives of member county, city, port, and tribal governments comprise the Boards of Directors of the two COGs.



Comprehensive Economic Development Strategy / Regional Investment Strategy

The Cascades West Economic Development District (CWEDD) develops the Comprehensive Economic Development Strategy for the Benton, Lane, Lincoln, and Linn Counties region (BL3). The CWEDD then implements community and economic development priorities based on the strategy and community needs.

This Comprehensive Economic Development Strategy is reviewed by the CWEDD Committees, and approved by the Boards of Directors of the CWEDD, CWCOG, and LCOG.

Accomplishments

Five-Year Review

In the five-year reporting period between April 1, 2005 and March 31, 2010, Cascades West Economic Development District provided access to \$14 million dollars in public funding to help fund 137 businesses within the region. (This activity does not include Cascades West Financial Services, Inc. lending - SBA 504, 7A, or EDP.) The packaging of these loans supported the retention or creation of over 913 jobs.

During this five-year period, the District assisted communities within the four counties with 18 public works and community facility development projects, accessing and/or managing over \$55.5 million in project funding. The District was also involved in managing and/or implementing 43 other economic development, planning, and problem-solving projects.

The Last Year in Review

Some of the more significant accomplishment of the CWEDD during the one-year period ending March 31, 2010 include:

- ◆ Received ARRA broadband development funds to bring services to one hundred critical institutions in three counties.
- ◆ Supported efforts that delivered millions of dollars of investment to improve the region's transportation system.
- ◆ Structured priority marine cluster technical assistance and public works projects for EDA consideration.
- ◆ Identified options to address wetland mitigation needs to provide an adequate inventory of industrial lands.
- ◆ Completed a pilot regional economic opportunities analysis for eight cities in Linn and Benton Counties.
- ◆ Built disaster resilience for businesses in Lincoln County under EDA funding.
- ◆ Continued development of a biofuels energy sector in the region.
- ◆ Initiated a wetlands delineation project for ten Willamette Valley cities.
- ◆ Worked with State and local governments on initiating carbon reduction plans.
- ◆ Published 2009 CEDS Update Report and conducted regional economic development forum jointly with the BL3 Regional Investment Board.
- ◆ Prepared data for 2010-2015 CEDS revision.

Further details on these projects and on the other accomplishments are provided at www.ocwcog.org on the Economic Development page.

Work Program Approach

In order to attempt to better meet the challenges faced by the communities within the region the District will attempt to further leverage its resources and will approach its community and economic development mission of community investment and reinvestment through the following multi-pronged approach.

- A. **Continuation of core service**, e.g. business lending, technical assistance for infrastructure development and other community needs, convening of parties to regionally address issues of broad concern.
- B. Through the delivery of core services, **seek ways to address multiple needs with a single “solution.”** Seek to identify new partners – including those whose mission is not primarily economic development – and new approaches to addressing economic issues while also addressing the needs of those partners. Examples of this approach include the successes of entities such as St. Vincent de Paul in Lane County that works to simultaneously address job training and employment skills, housing, recycling, and personal asset development through its projects.
- C. Find ways to **strengthen both business and civic entrepreneurship**, including strengthening the culture that supports creativity and risk-taking and that build upon the assets of the University of Oregon and Oregon State University.
- D. While continuing to address immediate problems, **maintain a longer-term view**. In the current economic climate, where the State of Oregon is recovering from an economic downturn, there is a great deal of emphasis placed by other programs and service providers on immediate job creation, resolving issues to create shovel-ready industrial sites, etc. These efforts are vital. However, it is through asset building and systems changes that we can better prepare ourselves to weather future period of limited economic growth.
- E. **Design service delivery systems that are user-centered.** First, we need to consider the needs, limitations and capacity of the end user of the services in determining how services will be provided. Second, we need to ensure that our services are accessible to all segments of the community to avoid trapping an underclass that might miss education, employment, and other opportunities.
- F. Put more emphasis on **convening economic development advocates and activists to a) look for ways to leverage individual results and b) examine from a systems viewpoint** the barriers that limit the effectiveness of our joint community and economic development work.

Priority Planning Activities

Consistent with the vision and goals for the region (see Section 7), and considering the approach described above, the District will undertake the following activities:

1. Support the communities within the District to develop and implement economic development strategies and initiatives and conduct studies and analyses. This will include assistance to jurisdictions and local groups with grant applications and management, as well as project management; monitoring of legislation and regulations and advocacy for local needs; and participation in coordination efforts with partners from throughout the region and state.
2. Provide governmental, public and private sector users with assistance in efforts to attract new business and industry through the provision of information and the conduct of studies.
3. Assist local jurisdictions in planning and developing public works and community facilities projects, including preparation of applications for State and federal assistance and administration of funds obtained by local governments.
4. Support regional committees addressing transportation and community development issues and needs.
5. Develop, administer, and market governmental finance programs and assist businesses in accessing capital. Business finance programs will continue to serve as “one stop” centers for businesses seeking public financing for start-up and expansion projects.

Action Plans

The Cascades West Community and Economic Development Committee and the Lane Economic Committee provide direction to staff on work program priorities and implementation approaches. Their respective work programs for the upcoming year are included in Appendix A. These work plans are provided as illustrations of how this Strategy will be implemented, and are expected to evolve and be revised as the tasks identified move toward implementation.

Program Evaluation

The District will undertake on a biennial basis a review and evaluation of its activities. The evaluation will address the extent to which the District’s efforts have incorporated the elements of the multi-pronged approach, described above, in its delivery of services and the extent to which these efforts are addressing the systemic barriers to community and economic vitality.

Additionally, the evaluation will include reporting on the following outcomes:

- ◆ Number of jobs retained or created
- ◆ Program dollars invested in business expansion
- ◆ Other public and private dollars leveraged for business expansion
- ◆ Number of priority infrastructure and community facility projects assisted
- ◆ Dollars mobilized for public infrastructure development



APPENDIX A

District Leadership & Work Plans

CWEDD Board of Directors

Members from the OCWCOG Executive Board

Dave Ballard	City of Monroe Councilor
Jay Dixon	Benton County Commissioner
Wade Doerfler	City of Halsey Councilor
Bill Hall	Lincoln County Commissioner
Sharon Konopa	City of Albany Mayor
Chester Noreikis	City of Lincoln City Councilor

Members from the LCOG Executive Board - six of the following:

Phil Brubaker	City of Florence Mayor
Sherry Duerst-Higgins	Lane Education Service District Board Member
Tony McCown	Lane Community College Board Member
Chris Pryor	City of Eugene Councilor
Faye Stewart	Lane County Commissioner
Judy Volta	City of Coburg Mayor
Warren Weathers	City of Lowell Mayor

Members from Economic Committees (two per county)

Randy Kugler	Benton - City of Philomath Manager
George McAdams	Benton - Benton County Natural Areas & Parks
Caroline Bauman	Lincoln - Lincoln ED Alliance Exec. Director
Maureen Keeler	Lincoln - Port of Newport Special Projects Mgr.
Jacque Morgan	Lane - City of Florence Assistant Manager
Robert Scoggin	Lane - Homestead Furniture
John Hitt	Linn - City of Lebanon Manager
John Pascone	Linn - Albany-Millersburg EDC President

Lead Staff

Cynthia Solie	OCWCOG Executive Director
George Kloeppe	LCOG Executive Director
Pam Silbernagel	OCWCOG Community & Economic Dev.
Steve Dignam	LCOG Business Lending

CEDS Strategy Committee

Economic Committees steer the EDA-required Strategy Committee. Participants in the Strategy Committee for this 2010-2015 CEDS included attendees of the June 2010 Forum:

Janet Steele	Albany Area Chamber of Commerce
Martha Wells	Albany Democrat Herald
Steve Lathrop	Albany Democrat-Herald Newspaper
John Pascone	Albany-Millersburg EDC
Chuck Crowe	ATCO America, Inc.
Annabelle Jaramillo	Benton County
George McAdams	Benton County
Jay Dixon	Benton County
Linda Modrell	Benton County
John Morrison	Brownsville Chamber of Commerce
Mandy Cole	Brownsville Chamber of Commerce
Mark Volmert	Cascades West Area Comm. on Transp.
Dave Dahlin	Cascades West Financial Services
Robert Dietz	Center for the Adv. Steady State Economy
Chris Chandler	Central Lincoln PUD
Drew Foster	City of Adair Village
Pacel Wesxerbers	City of Albany
Sharon Konopa	City of Albany
Wes Hare	City of Albany
S. Scott McDowell	City of Brownsville
Charles Tomlinson	City of Corvallis
Jared Thayer	City of Corvallis
Jon Nelson	City of Corvallis
Patricia Dixon	City of Corvallis
Jacque M. Morgan	City of Florence
Judy Cleeton	City of Halsey
Marjean Cline	City of Halsey
David Clyne	City of Junction City
John Hitt	City of Lebanon
Warren Weathers	City of Lowell
Barbara Castillo	City of Millersburg
Clayton Wood	City of Millersburg
Donald Driscoll	City of Millersburg
Linda Boyce	City of Millersburg
Jim Voetberg	City of Newport
Don Hampton	City of Oakridge
John Tamulonis	City of Springfield
Georgia Edwards	City of Tangent
Seaton McLennan	City of Tangent
Michelle Amberg	City of Toledo
Katherine Cleland	Cleland Marketing
Clay Martin	Community Services Consortium
Pam Barlow-Lind	Confederated Tribes of Siletz
Sharman Cookright	Confederated Tribes of Siletz Indians
Nick Batz	Congressman DeFazio Oregon Staff
Trevor Sleeman	Congressman Schraeder's Staff
James Ramseyer	Consumer Power, Inc.
Ali Bonakdar	Corvallis Area Metro Planning Org.
John Sechrest	Corvallis-Benton Chamber Coalition
Misty Rusk	Corvallis-Benton Chamber Coalition
Kristin Sanger	Cottage Grove Area Chamber of Commerce
Michelle Morford	Country Financial

Deborah McCullough	Department of Human Services
Joan Wessell	Downtown Corvallis Association
Shawn Winkler-Rios	Entrepreneurial Development Services
Ronald Woods	Eugene Economic Development Council
Bill Kisselburgh	Intl. Brotherhood of Electrical Workers
Jim Lindly	Lane Community College
Shirl Meads	Lane Community College
Tony McCown	Lane Council of Governments Board
Glenda Poling	Lane County
Mike McKenzie-Bahr	Lane County
Krystina Payne	Lane Workforce Partnership
Shelly Garret	Lebanon Area Chamber of Commerce
Kurt Olsen	Lincoln City Urban Renewal
Caroline Bauman	Lincoln County Economic Dev. Alliance
Roger Nyquist	Linn County
Steve Bekofsky	Linn Benton Lincoln Workforce Investment
Barbara Bessey	Linn-Benton Community College
Bruce Hecht	Natural Step Corvallis
Kip Much	NW Natural Gas
Brenda Baze	OCWCOG Business Lending
Thomas Hogue	Oregon Land Conservation & Development
Brian Wall	Oregon State University Technology Transfer
Doris Johnston	Pacific Power
Nancy Chlarson	Partners for Progress in Lebanon
Rick Petersen	Peak International
Maureen Keeler	Port of Newport
Bud Shoemake	Port of Toledo
Julie Manning	Samaritan Health Services
Bob Warren	State of Oregon Business Development
Dennie Houle	State of Oregon Business Development
Michael Williams	State of Oregon Business Development
Will Summers	State of Oregon Employment Department
Marguerite Nabeta	State of Oregon Governor's Office
Andrea Culy	Sweet Home Chamber of Commerce
Brian Hoffman	Sweet Home Economic Development Group
Kathleen Hutchinson	The Business Enterprise Center
Don Amberg	Toledo Chamber of Commerce
David Porter	U.S. Economic Development Administration
Doug Hunt	Umpqua Bank
Richard Linton	University of Oregon
Carolyn Gardner	ViewPlus Technologies
John Gardner	ViewPlus Technologies
David Green	West Coast Bank
Mollie Kerins	Willamette Valley Rehab Center
Sue Hankins	Worksource Oregon

Staff

Cynthia Solie	Oregon Cascades West Council of Govts.
George Kloeppe	Lane Council of Governments
Pam Silbernagel	Oregon Cascades West Council of Govts.
Steve Dignam	Lane Council of Governments
Emma Chavez	Oregon Cascades West Council of Govts.
Brenda Mainord	Oregon Cascades West Council of Govts.
Theresa Conley	Oregon Cascades West Council of Govts.
Milo Mecham	Lane Council of Governments
Phil Warnock	Oregon Cascades West Council of Govts.
Sandra Easdale	Oregon Cascades West Council of Govts.
Scott Wilson	Oregon Cascades West Council of Govts.

Lane Economic Committee Members

Committee Members

Robert Scoggin	Chair, Homestead Furniture
Pat Albright	Lane Community College
Mike Bloome	Monaco Coach
DeAnn Cherbas	Citizens Bank
Bill Fleenor	Lane County
Chuck Forster	Lane Workforce Partnership
Mike Galvin	Retired
Phillip Hudspeth	Lane Metro Partnership
Jacque Morgan	City of Florence
Greg Rikhoff	University of Oregon
John Sullivan	Self-Employed
Mike Sullivan	City of Eugene
John Tamulonis	City of Springfield
Ellen Teninty	Lane County Labor Council
Lynnette Wikstrom	Self-Employed

Ex-Officio Committee Members

Jay Bozievick	EWEB
Deb Schmidt	U.S. Forest Service
Kari Westlund	CVALCO

Lead Staff to Committee

Steve Dignam	LCOG Business Lending
Milo Mecham	LCOG Planning Services

Lane Economic Committee 2010-2011 Work Plan

1. Improve and increase communication with the LCOG Board.
2. Coordinate efforts with other local, regional, state, and federal economic development organizations in order to maximize efficient delivery of service.
3. Promote and help implement economic development strategies identified in the 2009/10 Eugene Prosperity Summit.
4. Work with rural communities to build fiber communication links.
5. Support and increase various government loan programs for small businesses, including the U.S. Small Business Administration.
6. Provide local input into the regional Comprehensive Economic Development Strategy (CEDS) process.
7. Provide a forum for exchange of information regarding economic development opportunities and programs.
8. Assist local communities, particularly rural communities, to define and coordinate their economic development strategies.

OCWCOG Community & Economic Development Committee Members

Committee Members

John Hitt	Chair, City of Lebanon
Pam Barlow Lind	Confederated Tribes of Siletz Indians
Caroline Bauman	Economic Dev. Alliance of Lincoln County
Alan Fudge	Linn-Benton Community College
Maureen Keeler	Port of Newport
Randy Kugler	City of Philomath
George McAdams	Benton County
Craig Martin	City of Sweet Home
Mia Mohr	North Santiam Canyon Economic Dev. Corp.
Patrick O'Connor	Oregon Coast Community College
Kurt Olsen	Lincoln City Urban Renewal
John Pascone	Albany-Millersburg Economic Dev. Corp.
James Ramseyer	Consumers Power, Inc.
John Sechrest	Corvallis-Benton Chamber Coalition
Joan Wessell	Downtown Corvallis Association

Committee Liaisons

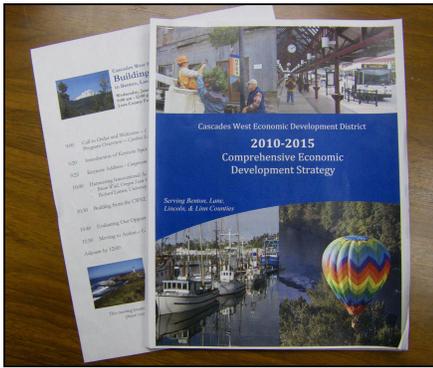
Bob Warren	State of Oregon Business Development Dept.
Dennie Houle	State of Oregon Business Development Dept.

Lead Staff to Committee

Pam Silbernagel	OCWCOG Community & Economic Dev.
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OCWCOG Community & Economic Development Committee 2010-2011 Work Plan

1. Improve industrial lands readiness by addressing wetlands impediments on prime industrial lands in Linn and Benton Counties and increasing the number of certified sites.
2. Build foundational elements for effective economic development marketing and industrial recruitment, including development of a regional brand and standardized information and presentation formats.
3. Improve access to capital for business development by continuing to provide business financing support and through development of additional pools of capital and encouragement of community-based investing.
4. Support development of business clusters such as the proposed Food Processing Consortia, bio-science development by partners, marine-based business development projects, and business opportunities related to the senior population.
5. Initiate and support special projects including helping partners to address business incubation facility and specialized equipment needs, to encourage innovation, and to assist business start-ups and entrepreneurs.



APPENDIX B

Data Profiles

Benton County Data Profile

Lane County Data Profile

Lincoln County Data Profile

Linn County Data Profile

Benton County Data Profile

Benton County Demographic and Housing Estimates: 2006-2008
 Data Set: 2006-2008 American Community Survey 3-Year
 Survey: American Community Survey
 Geographic Area: Benton County, Oregon

ACS Demographic and Housing	Estimat	Percen
SEX AND AGE		
Total population	81,040	81,040
Male	40,637	50.1%
Female	40,403	49.9%
Under 5 years	4,106	5.1%
5 to 9 years	4,025	5.0%
10 to 14 years	3,931	4.9%
15 to 19 years	7,279	9.0%
20 to 24 years	12,185	15.0%
25 to 34 years	10,306	12.7%
35 to 44 years	9,073	11.2%
45 to 54 years	11,452	14.1%
55 to 59 years	5,432	6.7%
60 to 64 years	4,011	4.9%
65 to 74 years	4,743	5.9%
75 to 84 years	2,974	3.7%
85 years and over	1,523	1.9%
Median age (years)	33.4	(X)
18 years and over	66,133	81.6%
21 years and over	58,664	72.4%
62 years and over	11,256	13.9%
65 years and over	9,240	11.4%
Race alone or in combination with one or more other races		
Total population	81,040	81,040
White	73,229	90.4%
Black or African American	1,246	1.5%
American Indian and Alaska Native	1,481	1.8%
Asian	5,487	6.8%
Native Hawaiian and Other Pacific Islander	255	0.3%
Some other race	1,851	2.3%
HISPANIC OR LATINO AND RACE		
Total population	81,040	81,040
Hispanic or Latino (of any race)	4,809	5.9%
Mexican	3,558	4.4%
Puerto Rican	217	0.3%
Cuban	63	0.1%
Other Hispanic or Latino	971	1.2%
Not Hispanic or Latino	76,231	94.1%
White alone	68,279	84.3%
Black or African American alone	789	1.0%
American Indian and Alaska Native alone	871	1.1%
Asian alone	4,302	5.3%
Native Hawaiian and Other Pacific Islander alone	97	0.1%
Some other race alone	121	0.1%
Two or more races	1,772	2.2%
Two races including Some other race	45	0.1%
Two races excluding Some other race, and Three or more races	1,727	2.1%
Total housing units	35,235	(X)

Source: U.S. Census Bureau, 2006-2008 American

Benton County Selected Social Characteristics: 2006-2008

Data Set: 2006-2008 American Community Survey 3-Year Estimates

Survey: American Community Survey

Geographic Area: Benton County, Oregon

Selected Social Characteristics in the United States	Estimate	Percent
HOUSEHOLDS BY TYPE		
Total households	33,120	33,120
Family households (families)	18,912	57.1%
Nonfamily households	14,208	42.9%
Households with one or more people under 18 years	8,285	25.0%
Households with one or more people 65 years and over	6,471	19.5%
Average household size	2.29	(X)
Average family size	2.8	(X)
SCHOOL ENROLLMENT		
Population 3 years and over enrolled in school	28,994	28,994
Nursery school, preschool	947	3.3%
Kindergarten	917	3.2%
Elementary school (grades 1-8)	6,263	21.6%
High school (grades 9-12)	3,697	12.8%
College or graduate school	17,170	59.2%
EDUCATIONAL ATTAINMENT		
Population 25 years and over	49,514	49,514
Less than 9th grade	739	1.5%
9th to 12th grade, no diploma	2,003	4.0%
High school graduate (includes equivalency)	8,353	16.9%
Some college, no degree	10,961	22.1%
Associate's degree	3,532	7.1%
Bachelor's degree	12,655	25.6%
Graduate or professional degree	11,271	22.8%
Percent high school graduate or higher	94.5%	(X)
Percent bachelor's degree or higher	48.3%	(X)
RESIDENCE 1 YEAR AGO		
Population 1 year and over	80,303	80,303
Same house	58,061	72.3%
Different house in the U.S.	21,426	26.7%
Same county	11,047	13.8%
Different county	10,379	12.9%
Same state	6,674	8.3%
Different state	3,705	4.6%
Abroad	816	1.0%
PLACE OF BIRTH		
Total population	81,040	81,040
Native	74,107	91.4%
Born in United States	72,651	89.6%
State of residence	34,933	43.1%
Different state	37,718	46.5%
Born in Puerto Rico, U.S. Island areas, or born abroad to American parent(s)	1,456	1.8%
Foreign born	6,933	8.6%

Source: U.S. Census Bureau, 2006-2008 American Community Survey

Benton County Selected Economic Characteristics: 2006-2008
 Data Set: 2006-2008 American Community Survey 3-Year Estimates
 Survey: American Community Survey
 Geographic Area: Benton County, Oregon

Selected Economic Characteristics	Estimate	Percent
EMPLOYMENT STATUS		
Population 16 years and over	67,935	67.935
In labor force	42,691	62.8%
Civilian labor force	42,562	62.7%
Employed	40,232	59.2%
Unemployed	2,330	3.4%
Armed Forces	129	0.2%
Not in labor force	25,244	37.2%
INDUSTRY		
Civilian employed population 16 years and over	40,232	40.232
Agriculture, forestry, fishing and hunting, and mining	1,666	4.1%
Construction	2,253	5.6%
Manufacturing	5,116	12.7%
Wholesale trade	879	2.2%
Retail trade	4,225	10.5%
Transportation and warehousing, and utilities	777	1.9%
Information	669	1.7%
Finance and insurance, and real estate and rental and leasing	1,836	4.6%
Professional, scientific, and management, and administrative and waste management services	3,574	8.9%
Educational services, and health care and social assistance	13,205	32.8%
Arts, entertainment, and recreation, and accommodation, and food services	3,398	8.4%
Other services, except public administration	1,268	3.2%
Public administration	1,366	3.4%
INCOME AND BENEFITS (IN 2008 INFLATION-ADJUSTED DOLLARS)		
Total households	33,120	33.120
Less than \$10,000	3,429	10.4%
\$10,000 to \$14,999	1,710	5.2%
\$15,000 to \$24,999	3,664	11.1%
\$25,000 to \$34,999	3,567	10.8%
\$35,000 to \$49,999	4,118	12.4%
\$50,000 to \$74,999	5,800	17.5%
\$75,000 to \$99,999	3,717	11.2%
\$100,000 to \$149,999	4,530	13.7%
\$150,000 to \$199,999	1,449	4.4%
\$200,000 or more	1,136	3.4%
Median household income (dollars)	50,350	(X)
Mean household income (dollars)	65,987	(X)
Families		
Families	18,912	18.912
Less than \$10,000	683	3.6%
\$10,000 to \$14,999	627	3.3%
\$15,000 to \$24,999	1,229	6.5%
\$25,000 to \$34,999	1,363	7.2%
\$35,000 to \$49,999	2,149	11.4%
\$50,000 to \$74,999	3,860	20.4%
\$75,000 to \$99,999	2,892	15.3%
\$100,000 to \$149,999	3,723	19.7%
\$150,000 to \$199,999	1,302	6.9%
\$200,000 or more	1,084	5.7%
Median family income (dollars)	70,922	(X)
Mean family income (dollars)	86,854	(X)
Per capita income (dollars)	27,526	(X)
PERCENTAGE OF FAMILIES AND PEOPLE WHOSE INCOME IN THE PAST 12 MONTHS IS BELOW THE POVERTY LEVEL		
All families	8.0%	(X)
Married couple families	4.4%	(X)
Families with female householder, no husband present	28.3%	(X)
All people		
All people	18.5%	(X)
Under 18 years	14.8%	(X)
18 years and over	19.4%	(X)
18 to 64 years	21.6%	(X)
65 years and over	6.8%	(X)
People in families	8.4%	(X)
Unrelated individuals 15 years and over	41.5%	(X)

Source: U.S. Census Bureau, 2006-2008 American Community Survey

Lane County Data Profile

Lane County Demographic and Housing Estimates: 2006-2008
 Data Set: 2006-2008 American Community Survey 3-Year Estimates
 Survey: American Community Survey
 Geographic Area: Lane County, Oregon

ACS Demographic and Housing Estimates	Estimate	Percent
SEX AND AGE		
Total population	342,921	342,921
Male	168,872	49.2%
Female	174,049	50.8%
Under 5 years	18,400	5.4%
5 to 9 years	18,507	5.4%
10 to 14 years	19,762	5.8%
15 to 19 years	23,103	6.7%
20 to 24 years	29,291	8.5%
25 to 34 years	48,766	14.2%
35 to 44 years	42,635	12.4%
45 to 54 years	50,542	14.7%
55 to 59 years	25,008	7.3%
60 to 64 years	18,553	5.4%
65 to 74 years	24,264	7.1%
75 to 84 years	16,185	4.7%
85 years and over	7,905	2.3%
Median age (years)	38	(X)
18 years and over	273,239	79.7%
21 years and over	255,961	74.6%
62 years and over	58,994	17.2%
65 years and over	48,354	14.1%
Race alone or in combination with one or more other races		
Total population	342,921	342,921
White	317,439	92.6%
Black or African American	5,615	1.6%
American Indian and Alaska Native	9,771	2.8%
Asian	12,793	3.7%
Native Hawaiian and Other Pacific Islander	1,313	0.4%
Some other race	7,839	2.3%
HISPANIC OR LATINO AND RACE		
Total population	342,921	342,921
Hispanic or Latino (of any race)	21,301	6.2%
Mexican	17,070	5.0%
Puerto Rican	247	0.1%
Cuban	165	0.0%
Other Hispanic or Latino	3,819	1.1%
Not Hispanic or Latino	321,620	93.8%
White alone	295,147	86.1%
Black or African American alone	3,567	1.0%
American Indian and Alaska Native alone	3,690	1.1%
Asian alone	9,064	2.6%
Native Hawaiian and Other Pacific Islander alone	632	0.2%
Some other race alone	484	0.1%
Two or more races	9,036	2.6%
Two races including Some other race	318	0.1%
Two races excluding Some other race, and Three or more races	8,718	2.5%
Total housing units	149,383	(X)

Source: U.S. Census Bureau, 2006-2008 American Community Survey

Lane County Selected Social Characteristics in the United States: 2006-2008

Data Set: 2006-2008 American Community Survey 3-Year Estimates

Survey: American Community Survey

Geographic Area: Lane County, Oregon

Selected Social Characteristics in the United States	Estimate	Percent
HOUSEHOLDS BY TYPE		
Total households	139,615	139,615
Family households (families)	83,967	60.1%
Nonfamily households	55,648	39.9%
Households with one or more people under 18 years	39,116	28.0%
Households with one or more people 65 years and over	32,379	23.2%
Average household size	2.39	(X)
Average family size	2.91	(X)
SCHOOL ENROLLMENT		
Population 3 years and over enrolled in school	88,397	88,397
Nursery school, preschool	3,987	4.5%
Kindergarten	3,706	4.2%
Elementary school (grades 1-8)	29,762	33.7%
High school (grades 9-12)	17,276	19.5%
College or graduate school	33,666	38.1%
EDUCATIONAL ATTAINMENT		
Population 25 years and over	233,858	233,858
Less than 9th grade	7,305	3.1%
9th to 12th grade, no diploma	16,800	7.2%
High school graduate (includes equivalency)	61,808	26.4%
Some college, no degree	63,218	27.0%
Associate's degree	19,449	8.3%
Bachelor's degree	39,013	16.7%
Graduate or professional degree	26,265	11.2%
Percent high school graduate or higher	89.7%	(X)
Percent bachelor's degree or higher	27.9%	(X)
RESIDENCE 1 YEAR AGO		
Population 1 year and over	339,002	339,002
Same house	264,307	78.0%
Different house in the U.S.	72,530	21.4%
Same county	49,767	14.7%
Different county	22,763	6.7%
Same state	10,376	3.1%
Different state	12,387	3.7%
Abroad	2,165	0.6%
PLACE OF BIRTH		
Total population	342,921	342,921
Native	323,704	94.4%
Born in United States	319,954	93.3%
State of residence	155,343	45.3%
Different state	164,611	48.0%
Born in Puerto Rico, U.S. Island areas, or born abroad to American parent(s)	3,750	1.1%
Foreign born	19,217	5.6%

Source: U.S. Census Bureau, 2006-2008 American Community Survey

Lane County Selected Economic Characteristics: 2006-2008
 Data Set: 2006-2008 American Community Survey 3-Year Estimates
 Survey: American Community Survey
 Geographic Area: Lane County, Oregon

Selected Economic Characteristics	Estimate	Percent
EMPLOYMENT STATUS		
Population 16 years and over	281,896	281,896
In labor force	177,477	63.0%
Civilian labor force	177,324	62.9%
Employed	166,231	59.0%
Unemployed	11,093	3.9%
Armed Forces	153	0.1%
Not in labor force	104,419	37.0%
INDUSTRY		
Civilian employed population 16 years and over	166,231	166,231
Agriculture, forestry, fishing and hunting, and mining	3,870	2.3%
Construction	11,308	6.8%
Manufacturing	21,950	13.2%
Wholesale trade	5,614	3.4%
Retail trade	22,398	13.5%
Transportation and warehousing, and utilities	6,684	4.0%
Information	3,494	2.1%
Finance and Insurance, and real estate and rental and leasing	9,835	5.9%
Professional, scientific, and management, and administrative and waste management services	14,308	8.6%
Educational services, and health care and social assistance	39,111	23.5%
Arts, entertainment, and recreation, and accommodation, and food services	14,435	8.7%
Other services, except public administration	7,758	4.7%
Public administration	5,468	3.3%
INCOME AND BENEFITS (IN 2008 INFLATION-ADJUSTED DOLLARS)		
Total households	139,615	139,615
Less than \$10,000	13,206	9.5%
\$10,000 to \$14,999	8,117	5.8%
\$15,000 to \$24,999	17,598	12.6%
\$25,000 to \$34,999	16,905	12.1%
\$35,000 to \$49,999	21,002	15.0%
\$50,000 to \$74,999	29,012	20.8%
\$75,000 to \$99,999	15,914	11.4%
\$100,000 to \$149,999	11,667	8.4%
\$150,000 to \$199,999	3,435	2.5%
\$200,000 or more	2,759	2.0%
Median household income (dollars)	44,180	(X)
Mean household income (dollars)	56,885	(X)
Families		
Less than \$10,000	3,877	4.6%
\$10,000 to \$14,999	2,408	2.9%
\$15,000 to \$24,999	8,068	9.6%
\$25,000 to \$34,999	8,517	10.1%
\$35,000 to \$49,999	13,485	16.1%
\$50,000 to \$74,999	20,082	23.9%
\$75,000 to \$99,999	12,868	15.3%
\$100,000 to \$149,999	9,576	11.4%
\$150,000 to \$199,999	2,799	3.3%
\$200,000 or more	2,287	2.7%
Median family income (dollars)	56,494	(X)
Mean family income (dollars)	68,816	(X)
Per capita income (dollars)	24,010	(X)
PERCENTAGE OF FAMILIES AND PEOPLE WHOSE INCOME IN THE PAST 12 MONTHS IS BELOW THE POVERTY LEVEL		
All families	9.1%	(X)
Married couple families	4.2%	(X)
Families with female householder, no husband present	29.5%	(X)
All people		
Under 18 years	15.7%	(X)
18 years and over	15.7%	(X)
18 to 64 years	17.3%	(X)
65 years and over	8.1%	(X)
People in families	9.3%	(X)
Unrelated individuals 15 years and over	33.4%	(X)

Source: U.S. Census Bureau, 2006-2008 American Community Survey

Lincoln County Data Profile

Lincoln County Demographic and Housing Estimates: 2006-2008
 Data Set: 2006-2008 American Community Survey 3-Year Estimates
 Survey: American Community Survey
 Geographic Area: Lincoln County, Oregon

ACS Demographic and Housing Estimates	Estimate	Percent
SEX AND AGE		
Total population	45,757	45,757
Male	21,822	47.7%
Female	23,935	52.3%
Under 5 years	2,328	5.1%
5 to 9 years	2,201	4.8%
10 to 14 years	2,415	5.3%
15 to 19 years	2,725	6.0%
20 to 24 years	2,299	5.0%
25 to 34 years	5,228	11.4%
35 to 44 years	5,156	11.3%
45 to 54 years	7,585	16.6%
55 to 59 years	3,778	8.3%
60 to 64 years	3,296	7.2%
65 to 74 years	4,497	9.8%
75 to 84 years	3,181	7.0%
85 years and over	1,068	2.3%
Median age (years)	45.7	(X)
18 years and over	36,916	80.7%
21 years and over	35,328	77.2%
62 years and over	10,548	23.1%
65 years and over	8,746	19.1%
Race alone or in combination with one or more other races		
Total population	45,757	45,757
White	42,214	92.3%
Black or African American	97	0.2%
American Indian and Alaska Native	2,343	5.1%
Asian	702	1.5%
Native Hawaiian and Other Pacific Islander	214	0.5%
Some other race	1,312	2.9%
HISPANIC OR LATINO AND RACE		
Total population	45,757	45,757
Hispanic or Latino (of any race)	3,305	7.2%
Mexican	N	N
Puerto Rican	N	N
Cuban	N	N
Other Hispanic or Latino	N	N
Not Hispanic or Latino	42,452	92.8%
White alone	39,228	85.7%
Black or African American alone	97	0.2%
American Indian and Alaska Native alone	1,388	3.0%
Asian alone	521	1.1%
Native Hawaiian and Other Pacific Islander alone	180	0.4%
Some other race alone	25	0.1%
Two or more races	1,013	2.2%
Two races including Some other race	0	0.0%
Two races excluding Some other race, and Three or more races	1,013	2.2%
Total housing units	28,972	(X)

Source: U.S. Census Bureau, 2006-2008 American Community Survey

Lincoln County Selected Social Characteristics: 2006-2008
 Data Set: 2006-2008 American Community Survey 3-Year Estimates
 Survey: American Community Survey
 Geographic Area: Lincoln County, Oregon

Selected Social Characteristics in the United States	Estimate	Percent
HOUSEHOLDS BY TYPE		
Total households	19,724	19,724
Family households (families)	11,721	59.4%
Nonfamily households	8,003	40.6%
Households with one or more people under 18 years	4,286	21.7%
Households with one or more people 65 years and over	6,488	32.9%
Average household size	2.29	(X)
Average family size	2.94	(X)
SCHOOL ENROLLMENT		
Population 3 years and over enrolled in school	8,512	8,512
Nursery school, preschool	579	6.8%
Kindergarten	297	3.5%
Elementary school (grades 1-8)	3,627	42.6%
High school (grades 9-12)	2,472	29.0%
College or graduate school	1,537	18.1%
EDUCATIONAL ATTAINMENT		
Population 25 years and over	33,789	33,789
Less than 9th grade	1,134	3.4%
9th to 12th grade, no diploma	2,266	6.7%
High school graduate (includes equivalency)	9,695	28.7%
Some college, no degree	10,658	31.5%
Associate's degree	2,254	6.7%
Bachelor's degree	4,662	13.8%
Graduate or professional degree	3,120	9.2%
Percent high school graduate or higher	89.9%	(X)
Percent bachelor's degree or higher	23.0%	(X)
RESIDENCE 1 YEAR AGO		
Population 1 year and over	45,261	45,261
Same house	39,597	87.5%
Different house in the U.S.	5,581	12.3%
Same county	2,502	5.5%
Different county	3,079	6.8%
Same state	1,429	3.2%
Different state	1,650	3.6%
Abroad	83	0.2%
PLACE OF BIRTH		
Total population	45,757	45,757
Native	42,770	93.5%
Born in United States	42,467	92.8%
State of residence	20,806	45.5%
Different state	21,661	47.3%
Born in Puerto Rico, U.S. Island areas, or born abroad to American parent(s)	303	0.7%
Foreign born	2,987	6.5%

Source: U.S. Census Bureau, 2006-2008 American Community Survey

Lincoln County Selected Economic Characteristics: 2006-2008
 Data Set: 2006-2008 American Community Survey 3-Year Estimates
 Survey: American Community Survey
 Geographic Area: Lincoln County, Oregon

Selected Economic Characteristics	Estimate	Percent
EMPLOYMENT STATUS		
Population 16 years and over	38,381	38,381
In labor force	21,186	55.2%
Civilian labor force	21,138	55.1%
Employed	20,038	52.2%
Unemployed	1,100	2.9%
Armed Forces	48	0.1%
Not in labor force	17,195	44.8%
INDUSTRY		
Civilian employed population 16 years and over	20,038	20,038
Agriculture, forestry, fishing and hunting, and mining	957	4.8%
Construction	1,875	9.4%
Manufacturing	818	4.1%
Wholesale trade	109	0.5%
Retail trade	3,406	17.0%
Transportation and warehousing, and utilities	899	4.5%
Information	189	0.9%
Finance and insurance, and real estate and rental and leasing	869	4.3%
Professional, scientific, and management, and administrative and waste management services	1,739	8.7%
Educational services, and health care and social assistance	3,649	18.2%
Arts, entertainment, and recreation, and accommodation, and food services	3,569	17.8%
Other services, except public administration	913	4.6%
Public administration	1,046	5.2%
INCOME AND BENEFITS (IN 2008 INFLATION-ADJUSTED DOLLARS)		
Total households	19,724	19,724
Less than \$10,000	1,998	10.1%
\$10,000 to \$14,999	1,666	8.4%
\$15,000 to \$24,999	2,653	13.5%
\$25,000 to \$34,999	2,909	14.7%
\$35,000 to \$49,999	2,795	14.2%
\$50,000 to \$74,999	3,677	18.6%
\$75,000 to \$99,999	1,886	9.6%
\$100,000 to \$149,999	1,429	7.2%
\$150,000 to \$199,999	477	2.4%
\$200,000 or more	234	1.2%
Median household income (dollars)	39,328	(X)
Mean household income (dollars)	51,976	(X)
Families		
Families	11,721	11,721
Less than \$10,000	669	5.7%
\$10,000 to \$14,999	491	4.2%
\$15,000 to \$24,999	1,086	9.3%
\$25,000 to \$34,999	1,649	14.1%
\$35,000 to \$49,999	1,833	15.6%
\$50,000 to \$74,999	2,585	22.1%
\$75,000 to \$99,999	1,696	14.5%
\$100,000 to \$149,999	1,156	9.9%
\$150,000 to \$199,999	365	3.1%
\$200,000 or more	191	1.6%
Median family income (dollars)	51,699	(X)
Mean family income (dollars)	63,618	(X)
Per capita income (dollars)	23,141	(X)
PERCENTAGE OF FAMILIES AND PEOPLE WHOSE INCOME IN THE PAST 12 MONTHS IS BELOW THE POVERTY LEVEL		
All families	11.7%	(X)
Married couple families	7.2%	(X)
Families with female householder, no husband present	35.9%	(X)
All people		
All people	16.8%	(X)
Under 18 years	23.0%	(X)
Related children under 18 years	22.5%	(X)
Related children under 5 years	30.8%	(X)
Related children 5 to 17 years	19.5%	(X)
18 years and over	15.4%	(X)
18 to 64 years	17.2%	(X)
65 years and over	9.6%	(X)
People in families	13.4%	(X)
Unrelated individuals 15 years and over	27.5%	(X)

Source: U.S. Census Bureau, 2006-2008 American Community Survey

Linn County Data Profile

Linn County Demographic and Housing Estimates: 2006-2008
 Data Set: 2006-2008 American Community Survey 3-Year Estimates
 Survey: American Community Survey
 Geographic Area: Linn County, Oregon

ACS Demographic and Housing Estimates	Estimate	Percent
SEX AND AGE		
Total population	113,082	113,082
Male	55,894	49.4%
Female	57,188	50.6%
Under 5 years	7,434	6.6%
5 to 9 years	7,398	6.5%
10 to 14 years	7,374	6.5%
15 to 19 years	7,481	6.6%
20 to 24 years	6,773	6.0%
25 to 34 years	15,685	13.9%
35 to 44 years	14,143	12.5%
45 to 54 years	16,018	14.2%
55 to 59 years	7,387	6.5%
60 to 64 years	6,192	5.5%
65 to 74 years	8,643	7.6%
75 to 84 years	5,890	5.2%
85 years and over	2,664	2.4%
Median age (years)	38.3	(X)
18 years and over	86,005	76.1%
21 years and over	81,908	72.4%
62 years and over	21,128	18.7%
65 years and over	17,197	15.2%
Race alone or in combination with one or more other races		
Total population	113,082	113,082
White	107,223	94.8%
Black or African American	762	0.7%
American Indian and Alaska Native	2,955	2.6%
Asian	1,719	1.5%
Native Hawaiian and Other Pacific Islander	279	0.2%
Some other race	3,196	2.8%
HISPANIC OR LATINO AND RACE		
Total population	113,082	113,082
Hispanic or Latino (of any race)	6,854	6.1%
Mexican	5,879	5.2%
Puerto Rican	72	0.1%
Cuban	29	0.0%
Other Hispanic or Latino	874	0.8%
Not Hispanic or Latino	106,228	93.9%
White alone	100,733	89.1%
Black or African American alone	328	0.3%
American Indian and Alaska Native alone	1,538	1.4%
Asian alone	1,072	0.9%
Native Hawaiian and Other Pacific Islander alone	119	0.1%
Some other race alone	66	0.1%
Two or more races	2,372	2.1%
Two races including Some other race	224	0.2%
Two races excluding Some other race, and Three or more races	2,148	1.9%
Total housing units	46,882	(X)

Source: U.S. Census Bureau, 2006-2008 American Community Survey

Linn County Selected Social Characteristics: 2006-2008

Data Set: 2006-2008 American Community Survey 3-Year Estimates

Survey: American Community Survey

Geographic Area: Linn County, Oregon

Selected Social Characteristics in the United States	Estimate	Percent
HOUSEHOLDS BY TYPE		
Total households	43,332	43,332
Family households (families)	29,780	68.7%
Nonfamily households	13,552	31.3%
Households with one or more people under 18 years	14,106	32.6%
Households with one or more people 65 years and over	11,599	26.8%
Average household size	2.58	(X)
Average family size	3.09	(X)
SCHOOL ENROLLMENT		
Population 3 years and over enrolled in school	26,205	26,205
Nursery school, preschool	1,599	6.1%
Kindergarten	1,626	6.2%
Elementary school (grades 1-8)	11,509	43.9%
High school (grades 9-12)	6,319	24.1%
College or graduate school	5,152	19.7%
EDUCATIONAL ATTAINMENT		
Population 25 years and over	76,622	76,622
Less than 9th grade	3,007	3.9%
9th to 12th grade, no diploma	8,527	11.1%
High school graduate (includes equivalency)	25,123	32.8%
Some college, no degree	22,069	28.8%
Associate's degree	6,278	8.2%
Bachelor's degree	8,110	10.6%
Graduate or professional degree	3,508	4.6%
Percent high school graduate or higher	84.9%	(X)
Percent bachelor's degree or higher	15.2%	(X)
RESIDENCE 1 YEAR AGO		
Population 1 year and over	111,126	111,126
Same house	89,463	80.5%
Different house in the U.S.	21,512	19.4%
Same county	13,431	12.1%
Different county	8,081	7.3%
Same state	5,438	4.9%
Different state	2,643	2.4%
Abroad	151	0.1%
PLACE OF BIRTH		
Total population	113,082	113,082
Native	108,817	96.2%
Born in United States	108,034	95.5%
State of residence	60,513	53.5%
Different state	47,521	42.0%
Born in Puerto Rico, U.S. Island areas, or born abroad to American parent(s)	783	0.7%
Foreign born	4,265	3.8%

Source: U.S. Census Bureau, 2006-2008 American Community Survey

Linn County Selected Economic Characteristics: 2006-2008
 Data Set: 2006-2008 American Community Survey 3-Year Estimates
 Survey: American Community Survey
 Geographic Area: Linn County, Oregon

Selected Economic Characteristics	Estimate	Percent
EMPLOYMENT STATUS		
Population 16 years and over	89,489	89,489
In labor force	55,027	61.5%
Civilian labor force	54,967	61.4%
Employed	51,720	57.8%
Unemployed	3,247	3.6%
Armed Forces	60	0.1%
Not in labor force	34,462	38.5%
INDUSTRY		
Civilian employed population 16 years and over	51,720	51,720
Agriculture, forestry, fishing and hunting, and mining	2,603	5.0%
Construction	4,364	8.4%
Manufacturing	9,222	17.8%
Wholesale trade	1,665	3.2%
Retail trade	5,823	11.3%
Transportation and warehousing, and utilities	2,665	5.2%
Information	982	1.9%
Finance and insurance, and real estate and rental and leasing	1,914	3.7%
Professional, scientific, and management, and administrative and waste management services	3,883	7.5%
Educational services, and health care and social assistance	10,236	19.8%
Arts, entertainment, and recreation, and accommodation, and food services	3,478	6.7%
Other services, except public administration	2,706	5.2%
Public administration	2,219	4.3%
INCOME AND BENEFITS (IN 2008 INFLATION-ADJUSTED DOLLARS)		
Total households	43,332	43,332
Less than \$10,000	3,335	7.7%
\$10,000 to \$14,999	2,994	6.9%
\$15,000 to \$24,999	4,504	10.4%
\$25,000 to \$34,999	5,535	12.8%
\$35,000 to \$49,999	7,377	17.0%
\$50,000 to \$74,999	8,223	19.0%
\$75,000 to \$99,999	5,763	13.3%
\$100,000 to \$149,999	4,313	10.0%
\$150,000 to \$199,999	806	1.9%
\$200,000 or more	492	1.1%
Median household income (dollars)	44,977	(X)
Mean household income (dollars)	55,999	(X)
Families		
Less than \$10,000	29,780	29,780
\$10,000 to \$14,999	1,783	6.0%
\$15,000 to \$24,999	1,236	4.2%
\$25,000 to \$34,999	2,297	7.7%
\$35,000 to \$49,999	3,501	11.8%
\$50,000 to \$74,999	4,704	15.8%
\$75,000 to \$99,999	6,449	21.7%
\$100,000 to \$149,999	5,057	17.0%
\$150,000 to \$199,999	3,724	12.5%
\$200,000 or more	627	2.1%
Median family income (dollars)	402	1.3%
Mean family income (dollars)	54,033	(X)
	62,808	(X)
Per capita income (dollars)	22,380	(X)
PERCENTAGE OF FAMILIES AND PEOPLE WHOSE INCOME IN THE PAST 12 MONTHS IS BELOW THE POVERTY LEVEL		
All families	11.3%	(X)
Married couple families	3.8%	(X)
Families with female householder, no husband present	42.2%	(X)
All people		
Under 18 years	15.0%	(X)
Related children under 18 years	22.2%	(X)
Related children under 5 years	21.8%	(X)
Related children 5 to 17 years	31.7%	(X)
Related children 5 to 17 years	18.1%	(X)
18 years and over	12.7%	(X)
18 to 64 years	13.9%	(X)
65 years and over	7.8%	(X)
People in families	12.1%	(X)
Unrelated individuals 15 years and over	28.2%	(X)

Source: U.S. Census Bureau, 2006-2008 American Community Survey