



Oregon

Theodore R. Kulongoski, Governor

Department of Land Conservation and Development

635 Capitol Street, Suite 150

Salem, OR 97301-2540

(503) 373-0050

Fax (503) 378-5518

www.lcd.state.or.us

NOTICE OF ADOPTED AMENDMENT

February 21, 2007

TO: Subscribers to Notice of Adopted Plan
or Land Use Regulation Amendments

FROM: Mara Ulloa, Plan Amendment Program Specialist

SUBJECT: City of Grants Pass Plan Amendment
DLCD File Number 005-06



The Department of Land Conservation and Development (DLCD) received the attached notice of adoption. Due to the size of amended material submitted, a complete copy has not been attached. A copy of the adopted plan amendment is available for review at the DLCD office in Salem and the local government office.

Appeal Procedures*

DLCD ACKNOWLEDGMENT or DEADLINE TO APPEAL: March 7, 2007

This amendment was submitted to DLCD for review 45 days prior to adoption. Pursuant to ORS 197.830 (2)(b) only persons who participated in the local government proceedings leading to adoption of the amendment are eligible to appeal this decision to the Land Use Board of Appeals (LUBA).

If you wish to appeal, you must file a notice of intent to appeal with the Land Use Board of Appeals (LUBA) no later than 21 days from the date the decision was mailed to you by the local government. If you have questions, check with the local government to determine the appeal deadline. Copies of the notice of intent to appeal must be served upon the local government and others who received written notice of the final decision from the local government. The notice of intent to appeal must be served and filed in the form and manner prescribed by LUBA, (OAR Chapter 661, Division 10). Please call LUBA at 503-373-1265, if you have questions about appeal procedures.

***NOTE: THE APPEAL DEADLINE IS BASED UPON THE DATE THE DECISION WAS MAILED BY LOCAL GOVERNMENT. A DECISION MAY HAVE BEEN MAILED TO YOU ON A DIFFERENT DATE THAN IT WAS MAILED TO DLCD. AS A RESULT YOUR APPEAL DEADLINE MAY BE EARLIER THAN THE ABOVE DATE SPECIFIED.**

Cc: Gloria Gardiner, DLCD Urban Planning Specialist
John Renz, DLCD Regional Representative
Matthew Crall, DLCD Transportation Planner
Bob Short, City of Grants Pass

<paa> yal

FORM 2

D L C D NOTICE OF ADOPTION

This form must be mailed to DLCD within 5 working days after the final decision per ORS 197.610, OAR Chapter 660 - Division 18 (See reverse side for submittal requirements)

DEPT OF

FEB 15 2007

LAND CONSERVATION AND DEVELOPMENT

Jurisdiction: City of Grants Pass Local File No.: 06-40200004 (If no number, use none)

Date of Adoption: Feb. 7, 2007 (Must be filled in) Date Mailed: Feb. 8, 2007 (Date mailed or sent to DLCD)

Date the Notice of Proposed Amendment was mailed to DLCD: Oct. 24, 2006

- Comprehensive Plan Text Amendment
Land Use Regulation Amendment
New Land Use Regulation
Comprehensive Plan Map Amendment
Zoning Map Amendment
Other: DATABASE Amendment (Please Specify Type of Action)

Summarize the adopted amendment. Do not use technical terms. Do not write "See Attached."

Amended the Comprehensive Plan map and changed 12.84 Acres of TAX Lot 36-05-06-00/1400 from Industrial to Low-Density Residential and the zoning from I-Industrial to R-1-12 residential. Amended the database to include the submitted EAT.

Describe how the adopted amendment differs from the proposed amendment. If it is the same, write "Same." If you did not give notice for the proposed amendment, write "N/A."

Proposed zone change was to R-1-8 residential. Adopted zoning was R-1-12 residential.

Plan Map Changed from: Industrial to Low Density Residential

Zone Map Changed from: I-Industrial to R-1-12 residential

Location: 2944 NW Highland Ave. Acres Involved: 12.84
Specify Density: Previous: Industrial (2500 sq. ft. min) New: Low Density Residential (12,000 sq. ft. min)

Applicable Statewide Planning Goals: 7, 9, 10, 11

Was an Exception Adopted? Yes: No: [checked]

DLCD File No.: 006-06(15652)

DEPT OF

FEB 15 2007

Did the Department of Land Conservation and Development receive a notice of Proposed **AMENDMENT FORTY FIVE (45) days prior to the first evidentiary hearing.** Yes: No:

If no, do the Statewide Planning Goals apply. Yes: No:

If no, did The Emergency Circumstances Require immediate adoption. Yes: No:

Affected State or Federal Agencies, Local Governments or Special Districts: City of Grants

Pass, Josephine County

Local Contact: Bob Shont Area Code + Phone Number: 541-474-6355 Ext. 6103

Address: 101 N.W. 'A' Street

City: Grants Pass Zip Code+4: 97526

ADOPTION SUBMITTAL REQUIREMENTS

This form **must be mailed** to DLCD **within 5 working days after the final decision**
per ORS 197.610, OAR Chapter 660 - Division 18.

1. Send this Form and TWO (2) Copies of the Adopted Amendment to:

**ATTENTION: PLAN AMENDMENT SPECIALIST
DEPARTMENT OF LAND CONSERVATION AND DEVELOPMENT
635 CAPITOL STREET NE, SUITE 150
SALEM, OREGON 97301-2540**

2. Submit **TWO (2) copies** the adopted material, if copies are bounded please submit **TWO (2) complete copies** of documents and maps.
3. Please Note: Adopted materials must be sent to DLCD not later than **FIVE (5) working days** following the date of the final decision on the amendment.
4. Submittal of this Notice of Adoption must include the text of the amendment plus adopted findings and supplementary information.
5. The deadline to appeal will not be extended if you submit this notice of adoption within five working days of the final decision. Appeals to LUBA may be filed within **TWENTY-ONE (21) days** of the date, the "Notice of Adoption" is sent to DLCD.
6. In addition to sending the "Notice of Adoption" to DLCD, you must notify persons who participated in the local hearing and requested notice of the final decision.
7. **Need More Copies?** You can copy this form on to 8-1/2x11 green paper only ; or call the DLCD Office at (503) 373-0050; or Fax your request to:(503) 378-5518; or Email your request to Larry.French@state.or.us - ATTENTION: PLAN AMENDMENT SPECIALIST.

ORDINANCE NO. 5394

AN ORDINANCE AMENDING THE COMPREHENSIVE PLAN MAP FROM INDUSTRIAL TO LOW-DENSITY RESIDENTIAL AND THE ZONING MAP FROM I-INDUSTRIAL TO R-1-12 FOR A PORTION OF THE PROPERTY LOCATED AT 2944 HIGHLAND AVENUE. THE ORDINANCE WILL ALSO AMEND THE COMPREHENSIVE PLAN DATABASE.

WHEREAS:

1. The Comprehensive Plan of the City of Grants Pass was adopted December 15, 1982. The Development Code of the City of Grants Pass was adopted August 17, 1983; and
2. The owner of the subject property has requested the comprehensive plan database, comprehensive plan map, and zone map amendments.
3. In terms of the physical conditions and characteristics, location and availability of services, the property is appropriate for the proposed designation; and
4. The applicable criteria listed in the Comprehensive Plan and the Development Code are met.

NOW, THEREFORE, THE CITY OF GRANTS PASS HEREBY ORDAINS:

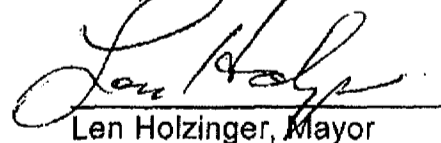
Section 1: The Comprehensive Plan database is hereby amended to include the Economic Opportunities Analysis attached as Exhibit 'A'.

Section 2: The Comprehensive Plan Map is hereby amended to include a portion of the property identified by Assessor's Map and Tax Lot 36-05-06-00/1400. Twelve and eighty-four one-hundredths acres of Tax Lot 1400, shown in Exhibits 'B', are to be entirely within the Low-Density Comprehensive Plan Map designation.

Section 3: The Zoning Map is hereby amended to include approximately 12.84 acres of Tax Lot 1400 within the R-1-12 zoning district, as shown in Exhibit 'C'.

ADOPTED by the Council of the City of Grants Pass, Oregon, in regular session, this 17TH day of January, 2007.

SUBMITTED to and Approved by the Mayor of the City of Grants Pass, Oregon, this 24 day of January, 2007.


Len Holzinger, Mayor

ATTEST:

Karin M Lange
Administrative Services Director Joanne Stumpf

Date submitted to Mayor: 1-24-07

Approved as to Form, Ulys Stapleton, City Attorney 

CITY OF GRANTS PASS COMMUNITY DEVELOPMENT DEPARTMENT

**HIGHLAND AVENUE COMPREHENSIVE PLAN MAP AMENDMENT
AND ZONING MAP AMENDMENT
CITY COUNCIL FINDINGS OF FACT**

Procedure Type:	Type IV: Planning Commission Recommendation and City Council Decision
Project Number:	06-40200004
Project Type:	Comprehensive Plan Map Amendment, Comprehensive Plan Database Amendment, and Zoning Map Amendment
Map & Tax Lots:	36-05-06-00/1400
Owners:	Valerie Albright, Trustee of the Ernest Mignot Family Trust
Applicant:	Raul Woerner, Craig Stone and Associates
Address:	2944 NW Highland Avenue
Existing Comprehensive Plan Designation:	Industrial
Proposed Comprehensive Plan Designation:	Low Density Residential
Current Zoning:	I-Industrial
Proposed Zoning:	R-1-8
Planner Assigned:	Bob Short
Application Received:	October 12, 2006
Application Complete:	October 13, 2006
Date of UAPC Staff Report:	December 6, 2006
Date of UAPC Hearing:	December 13, 2006
Date of City Council Staff Report:	January 10, 2007
Date of City Council Hearing:	January 17, 2007
City Council Findings of Fact:	February 7, 2007

I. PROPOSAL:

Comprehensive Plan Map Amendment from Industrial to Low Density Residential and a Zoning Map Amendment from I-Industrial to R-1-8 for approximately 12.84 acres of the 17.8 acre parcel. A Comprehensive Plan Database Amendment is also requested with this application.

II. AUTHORITY AND CRITERIA:

Sections 13.5.5 and 13.8.3 of the Comprehensive Plan provide that joint review by the City Council and Board of County Commissioners shall be required for amendment and revision to Comprehensive Plan findings, goals, policies, and land use maps of the Comprehensive Plan.

The review shall be in accordance with the procedures of Section 13.8.3 of the Comprehensive Plan, which provides for a recommendation hearing by the Urban Area Planning Commission prior to a joint hearing of the City Council and Board of County Commissioners.

However, with adoption of the 1998 Intergovernmental Agreement, this provision requiring a joint hearing is modified with the result that City Council will make the decision, and the County will have automatic party status, as summarized below:

Section III of the 1998 Intergovernmental Agreement (IGA) provides for transfer of authority for provision and management of planning services from the County to the City for the Urbanizing Area. It provides:

The City is hereby vested with the exclusive authority to exercise the County's legislative and quasi-judicial powers, rights, and duties within the Urbanizing Area...

Section V of the IGA contains provisions pertaining to notification and appeals for quasi-judicial and legislative decisions within the Urbanizing Area.

For legislative decisions, the IGA provides:

The City agrees to provide written notice of all proposed legislative actions to the County at least 45 days prior to the public hearing at which the action is first considered. The County shall be deemed to have automatic party status regarding all such decisions for the purposes of standing for appeals.

For quasi-judicial decisions, the IGA provides:

The City shall give the County written notice of all land use, limited land use, and expedited land division decisions in the UA in the same manner as required by Oregon Law for adjacent property owners. The County shall be deemed to have automatic party status regarding all such decisions for the purposes of standing for appeals. Quasi-judicial land use and limited land use development decisions made by the City's Director or Hearings Officer or the Urban Area Planning Commission may be appealed according the City's Land Use Hearing Rules. The City may provide staff support for any administrative or judicial review of decisions regarding the application of Land Use Regulations to land within the UA.

Section 13.8.3 of the Comprehensive Plan provides that notice shall be as provided in Section 2.060 of the Development Code for a Type IV procedure. Section 13.8.3 further provides that the hearing shall be conducted in accordance with the Legislative Hearing Guidelines of Section 9 of the Development Code.

Therefore, the application will be processed through a "Type IV" procedure, with a recommendation from the Urban Area Planning Commission and a final decision by City Council. The County has automatic party status for appeals.

The text or map of the Comprehensive Plan may be recommended for amendment and amended provided the criteria in Section 13.5.4 of the Comprehensive Plan are met.

The Zoning Map may be amended provided the Criteria in Section 4.033 of the development Code are met.

III. APPEAL PROCEDURE:

Section 10.060 provides the City Council's final decision to be appealed to the State Land Use Board of Appeals (LUBA) as provided in state statutes. A notice of intent to appeal must be filed with LUBA within 21 days of the Council's written decision.

IV. PROCEDURE:

- A. An application for a Comprehensive Plan Map amendment, Zone Map amendment and Comprehensive Plan database amendment was submitted on October 12, 2006. The application was deemed complete on October 13, 2006 and processed in accordance with Section 2.060 of the Development Code.
- B. Notice of the proposed amendments and the public hearings was mailed to the Oregon Department of Land Conservation and Development on October 24, 2006.
- C. Public notice of the December 13, 2006 Planning Commission hearing was mailed on November 22, 2006 in accordance with Sections 2.053, 2.063 and 2.095 of the Development Code.
- D. A public hearing was held by the Urban Area Planning Commission on December 13, 2006 to consider the request.
- E. Public notice of the January 17, 2007 City Council hearing was mailed on December 27, 2006 in accordance with Sections 2.053, 2.065 and 2.095 of the Development Code.
- F. Public notice of the January 17, 2007 City Council hearing was published in the local newspaper on January 4, 2007.
- G. A public hearing was held by the City Council on January 17, 2007 to consider the request.

V. SUMMARY OF EVIDENCE:

- A. The basic facts and criteria regarding this application are contained in the staff report and attached record, which are attached as Exhibit "A" and incorporated herein.
- B. The minutes of the January 17, 2007 public hearing held by the City Council, which are attached as Exhibit "B", summarize the oral testimony presented and are hereby adopted and incorporated herein.
- C. Exhibit 5 to City Council Staff Report. Letter from applicant with attached survey showing actual size of affected property to be 12.84 acres.

VI. BACKGROUND:

Property Characteristics

- 1. Size: Approximately 44 ~~12.84~~ acres. Total parcel is 17.8 acres.
- 2. Frontage: Highland Avenue, Sinclair Drive and Pony Lane (not located within the UGB)
- 3. Access: Highland Avenue
- 4. Public Utilities:
 - a. Existing:
 - i. Water: 8-inch line in Highland Avenue. 8-inch line in Sinclair Drive approximately 74 feet from the property.
 - ii. Sewer: 8-inch sewer line in Sinclair Drive.
 - iii. Storm Water: None
 - b. Proposed: The applicant proposes no further extension of utilities at this time.
- 5. Topography: The property contains steep slopes including Class A slopes in excess of 25%.
- 6. Natural Hazards: The property is located within the Steep Slope Hazard District and a Wildland / Urban Interface area.
- 7. Natural Resources: The majority of the property is heavily wooded. There is also a stream and associated wetlands running primarily west to east across the property. The wetlands are not covered by the local wetlands inventory.

8. Existing Land Use:

a. On site: Industrial and a Mobile Home Park

b. Surrounding:

North: Industrial (M-2 and Rural Industrial outside UGB)

South: Single Family Residential (RR 5 outside UGB)

East: Single Family Residential (R-1-8) and Industrial (M-2)

West: Single Family Residential (RR 5 outside UGB)

9. Special Purpose Districts: Steep Slope Hazard District, Wetlands Overlay

VII. GENERAL DISCUSSION AND FINDINGS:

The subject property has been zoned Industrial since it was originally incorporated into the Urban Growth boundary in the early 1980's. The north end of the property has been developed with an industrial building and a mobile home park. The south end of the property has never been developed primarily because it contains Class A slopes in excess of 25%, and this presents challenges for industrial development of the property.

The proposed zone change is supported because the land appears unsuitable for industrial development and residential development seems more appropriate. However, the proposal to change the zoning to R-1-8 is of concern for several reasons. First, properties within the UGB with Class A slopes are generally located in lower density zones such as R-1-10 or R-1-12 because additional area is required to protect the slopes. The major subdivisions developed in steep slope areas over the past few years have all be in either R-1-10 or R-1-12 zones. For example, Panoramic, Townes View, and the various phases of Laurelridge, Meadow Wood, and Forest Hills are all located within the R-1-10 or R-1-12 zones. Rezoning to a lower-density can also assist in protection of the stream located on the property. It is recommended that the property be rezoned to R-1-12 to provide for the greatest protection of the slopes on the property and remain consistent with other properties located in the steep slope areas on the northwest side of the UGB.

Also of concern is the potential street layout for the property. There is an existing street plug at the end of Sinclair Drive which would provide access to any proposed subdivision of the subject property. Any future development would be required to create a street connection back to Highland Avenue through the portion of the property to retain the existing industrial zoning. It is recommended that no portion of this street contain an access to the industrial area, but rather access to the industrial area would be taken accesses only from Highland Avenue to minimize conflicts between residential and industrial uses.

VIII. CONFORMANCE WITH APPLICABLE CRITERIA:

For comprehensive plan map amendments, Comprehensive Plan Policy 13.5.4 requires that all of the following criteria be met:

CRITERION (a): Consistency with other findings, goals and policies in the Comprehensive Plan.

City Council's Response: Satisfied. The subject property lies within the North City I Area of the North Area Industrial portion of the Urban Growth Boundary (UGB). The Comprehensive Plan does not state specific policies for the North City I area; however, the Economy Element of the Comprehensive Plan includes a policy designed to ensure that an adequate quality and quantity of industrial land is available within the UGB. The subject property includes land with steep slopes in excess of 30%, which may not be suitable or considered of adequate "quality" for industrial development.

The Housing Element of the Comprehensive Plan indicates that sufficient lands capable of full urbanization shall be provided within the UGB to ensure an adequate choice in the market place for the estimated future population growth. Recent residential development has eliminated much of the available supply of residential properties within the UGB, and the proposal would supply additional residential land for future growth in accordance with the policies of the Housing Element.

The Comprehensive Plan identifies the northwest slopes along the edge of the UGB where the subject property is located as being within a Slope Hazard area. The 15-35% slopes found on this property are identified as a moderate hazard. However, the requirements of the Development Code regarding steep slopes will mitigate the negative effects of this potential hazard. Changing the zone of the property to a lower density zone such as R-1-12 would also help to mitigate the negative effects of the steep slopes.

The subject property is also located within a Wildfire Hazard area. The Comprehensive Plan indicates properties within hilly terrain should take steps to minimize this hazard including but not limited to, reducing fuel concentrations, utilizing fire resistant vegetation and constructing loop roads systems. Specific requirements to mitigate potential hazards in this area will be addressed at the time of development.

CRITERION (b): A change in circumstances validated by and supported by the database or proposed changes to the database, which would necessitate a change in findings, goals and policies.

City Council's Response: Satisfied. The applicant has submitted an Economic Opportunities Analysis (EOA) as required by Goal 9 to ensure a sufficient supply of employment lands will be available within the UGB over a 20-year span. The applicant proposes this EOA be added to the database. This analysis includes a study of lands available for development within Grants Pass and indicates a 4.7 year supply of low-density residential land within the UGB and a 26.4 ~~23.2~~ year supply of industrial land.

City Council has reviewed the submitted EOA, and the methodology appears sound and the conclusions basically adequate, considering the limited scope of the proposal. City

Council recommends the applicant's EOA be added to the database. It should be noted that the City of Grants Pass has received a grant from the State of Oregon and contracted a private organization to complete an EOA in conjunction with a planned future expansion of the UGB. This EOA will be much more extensive than the EOA submitted by the applicant, and once it is completed, it is expected to supersede the EOA the applicant has submitted.

CRITERION (c): Applicable planning goals and guidelines of the State of Oregon.

City Council's Response: Satisfied. Applicable goals are identified below. The applicant has submitted findings related to each of the state wide planning goals.

Goal 7:	Areas Subject to Natural Disaster and Hazards
Goal 9:	Economic Development
Goal 10:	Housing
Goal 11:	Public Facilities and Services

City Council has reviewed the goals and Comprehensive Plan policies and concludes that the proposal is consistent with the Statewide Goals and the Comprehensive Plan policies.

The proposed amendment is in compliance with Goal 10, Housing. The state planning goals encourage the provision of adequate housing within Urban Growth Boundaries. The proposal provides for low urban housing densities in an area planned for industrial development. Public services are present to serve the development, or are contiguous to the property, and will be extended in conjunction with development.

The subject property is located within the steep slope area which has been identified in Goal 7 as subject to natural disaster and hazards. The City's Development Code contains specific requirements for development within the Steep Slope Hazard District. Issues related to development within the steep slope area can be addressed as specific developments are proposed. City Council recommends rezoning the property to R-1-12 rather than the R-1-8 proposed to allow for a thorough mitigation of the potential hazards created by the presence of Class A slopes in excess of 25%. As an option, the applicant may provide a development agreement addressing this hazard.

The applicant has submitted an EOA that meets the requirements of Goal 9 and indicates a sufficient supply of industrial land remains available for future needs. The submitted EOA also indicates a short supply of low-density residential lands, especially when compared to the available industrial land.

An additional issue is the quality of the industrial land included in the proposal. Goal 9 indicates that "Prime industrial lands possess site characteristics that are difficult or impossible to replicate in the planning area or region." Included in the Goal 9 definition of "Site Characteristics" is topography. The subject property contains steep slopes in excess of 25% and is probably not considered suitable for industrial development especially when compared to other industrial lands in the planning area including industrial lands on the east side of the UGB.

CRITERION (d): Citizen Review and comment.

City Council's Response: Satisfied. Notice was provided to surrounding property owners in accordance with the Comprehensive Plan and Development Code. No written comments have been received as of the date of the staff report. The owner of a nearby lot zoned Business Park did express a concern at the community development counter that the noise created by his existing business would affect a future residential development subject property. The proposed development will not abut or be adjacent to this existing industrial property and is not a "specifically protected" use according to Section 24.120 (b) of the Development Code. However, the proposal will create residential property much closer to industrial property, and noise created on the industrial property could potentially effect future residential development. These issues can be addressed upon application for development of the property.

CRITERION (e): Review and comment from affected governmental units and other agencies.

City Council's Response: Satisfied. Notice was provided to affected governmental units and other agencies.

Notice was provided to the Department of Land Conservation and Development (DLCD). DLCD has submitted comments regarding this application. However, these comments were completed before the representative, John Renz, received the EOA, and he indicated more time is needed for a complete analysis of the EOA. John Renz indicated in a phone conversation on 1-8-07 that he had no additional comments.

ODOT was provided notice of the application including a copy of the Traffic Impact Analysis. ODOT has submitted comments expressing support for the findings of the TIA.

Notice was provided to Josephine County in accordance with the 1998 Intergovernmental Agreement for the Urbanizing Area. The County did not provide comment.

CRITERION (f): A demonstration that any additional need for basic urban services (water, sewer, streets, storm drainage, parks, and fire and police protection) is adequately covered by adopted utility plans and service policies, or a proposal for the requisite changes to said utility plans and service policies as a part of the requested Comprehensive Plan amendment.

City Council's Response: Satisfied with Conditions. The adopted plans adequately address the need for basic urban services in the area. Conditions of approval would be added to any concurrent subdivision application to bring urban services into compliance with the levels identified in the various master plans.

CRITERION (g): Additional information as required by the review body.

City Council's Response: Satisfied. The submitted application provided a thorough analysis of the proposal. Additional information will be required upon request of the review body.

CRITERION (h): In lieu of item (h) above, demonstration that the Plan as originally adopted was in error.

City Council's Response: Not Applicable. Criterion (b) is not applicable. The Plan was not adopted in error. The proposed amendments are adopted in response to a change in circumstances. See Criterion (b) for discussion of the change in circumstances.

For Zone Map Amendments, Section 4.033 of the City of Grants Pass Development Code requires that all of the following criteria be met:

CRITERION 1: The proposed use, if any is consistent with the proposed Zoning District.

City Council's Response: Satisfied. The applicant has not indicated a proposed use; however, any future proposals will be required to comply with the Development Code regarding development within the R-1-12 zone.

CRITERION 2: The proposed Zoning District is consistent with the Comprehensive Plan Land Use Map designation.

City Council's Response: Contingent on action taken on the proposed Comprehensive Plan Amendment. If the Comprehensive Plan designation were amended from Industrial to Low Density Residential, the proposed zoning would be consistent with the Comprehensive Plan Land Use Map designation.

CRITERION 3: A demonstration that existing or proposed levels of basic urban services can accommodate the proposed or potential development without adverse impact upon the affected service area or without a change to adopted utility plans.

City Council's Response: Satisfied. See Discussion under Criterion (f) above.

CRITERION 4: A demonstration that the proposed amendment is consistent with the functions, capacities, and performance standards of transportation facilities identified in the Master Transportation Plan.

City Council's Response: Satisfied. The applicant has submitted a detailed Traffic Impact Analysis (TIA) completed by JRH Engineering of Eugene, Oregon. The submitted TIA includes an analysis of the nearby intersections including those located around the Interstate 5 interchange. The TIA concludes that all intersections meet the adopted mobility standards with or without the zone change and the potential resulting development. The TIA has been reviewed and approved by the City Engineer. The

Oregon Department of Transportation (ODOT) has received the TIA and has submitted comments in support of the proposal.

CRITERION 5: The natural features of the site are conducive to the proposed Zoning District.

City Council's Response: Satisfied. The property contains Class A slopes in excess of 25%. These slopes represent challenges to any residential development; however, slopes of this degree are generally contained within lower-density residential zones. It is recommended the property be rezoned to R-1-12 rather than the R-1-8 proposed.

CRITERION 6: The proposed zone is consistent with the requirements of all overlay districts that include the subject property.

City Council's Response: Satisfied with Conditions at the time of development. The property is located within the Steep Slope Hazard District. The Development Code requires that the development on the property meet the steep slope development standards. Conditions include the provision of steep slope development reports and erosion control and grading plans as required by the Code. The property also contains potential wetlands and a stream and will be required to comply with Code requirements regarding wetlands and stream banks.

CRITERION 7: The timing of the zone change request is appropriate in terms of the efficient provision or upgrading of basic urban services versus the utilization of other buildable lands in similar zoning districts already provided with basic urban services.

City Council's Response: Satisfied. The property is located within close proximity to urban services and will not require substantial extensions in order to have those services available for development.

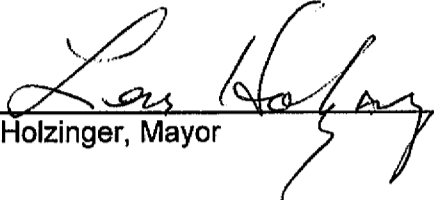
CRITERION 8: In the case of rezoning from the Urban Reserve District, that the criteria for conversion are met, as provided in Section 4.034.

City Council's Response: Not Applicable. The subject property is not zoned Urban Reserve.

IX. DECISION AND SUMMARY:

The City Council finds the applicable criteria are satisfied and **APPROVES** the proposed Comprehensive Plan Map and Zoning Map amendment from I (Industrial) to R-1-12 (Low-Density Residential). The vote was 5-0-1, with Councilors Paquin, Renfro, Kangas, Patterson and Wendle, in favor and none opposed. Councilor Cummings abstained and Councilors Berger and Thompson were absent.

X. ADOPTED BY THE GRANTS PASS CITY COUNCIL this 7th day of February 2007.



Len Holzinger, Mayor

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cap/bs/mos

CRAIG A. STONE & ASSOCIATES, LTD.
Consultants in Urban Planning and Development

712 Cardley Avenue • Medford, Oregon 97504
Telephone: (541) 779-0569 • Facsimile: (541) 779-0114 • E-mail: raul@cstoneassociates.com

MEMORANDUM

To: Jim Huber, City of Grants Pass Planning Director
From: Raul Woerner
Date: January 17, 2007
Subject: Legal Description and Boundary Survey for Proposed Comprehensive Plan Map Amendment and Zone Change; Project No. 06-402000024

Dear Mr. Huber:

Please find included herein a map and legal description prepared by Peter D. Allen, an Oregon registered professional land surveyor, which establish the location of the proposed zone boundary based on the center line of the stream. The area to the north will retain the existing industrial comprehensive plan map designation and zoning. The area to the north is to be designated and zoned for residential use in accordance with the City's final action.

Please note that the survey establishes that the parent parcel has 18.11 acres, that the area to the north of the creek has 5.27 acres (+/-), and the area to the south proposed for re-zoning has 12.84 acres. That is, the parent parcel is 0.31 acres larger as a whole, the area to the north of the creek is 1.53 acres smaller, and the area to the south of the creek is 1.84 acres larger, than approximated in the application findings. The approximated acreage was based on GIS and assessment data, which is less precise than data from an actual land survey. The request remains fundamentally the same in that the boundary between the industrial and residential zones is to coincide with the seasonal drainage channel.

I request that the City, in its proceedings, acknowledge that the survey establishes the actual boundary and respective land use areas and adopt, by exhibit, the survey and legal description of the same. In considering this, the City make take into consideration that the area south of the stream, regardless of acreage, is more appropriate to residential than industrial uses for the same reasons established in the applicant's findings and the staff and Planning Commission recommendations. As land generally unsuitable for industrial use, the removal of the incremental 1.53 acre from the industrial land inventory will not adversely impact the economic opportunities available to the City of Grants Pass.

EXHIBIT

5

TO CC
S. REP

EX. C to C.C. Findings

Please include this correspondence and the attached map and legal description into the record for these proceedings.

Respectfully yours,

CRAIG A. STONE & ASSOCIATES, LTD.



Raul Woerner
Consulting Planner

RGW/m

Enclosure

cc. File



321 Northwest "A" Street
Grants Pass, Oregon 97526

Peter D. Allen
LAND SURVEYING

Office/Fax: (541) 476-4502
E-mail: pdasurveying@qwest.net

January 17, 2007

PARCEL A

(A portion of Tax Lot 1400, Assessor's Map No. 36-05-06-00)

Description for a tract of land situated in the East Half of the Southwest Quarter of the Northwest Quarter of Section 6, Township 36 South, Range 5 West of the Willamette Meridian, Josephine County, Oregon, being more particularly described as follows:

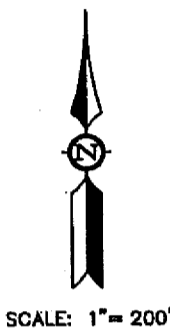
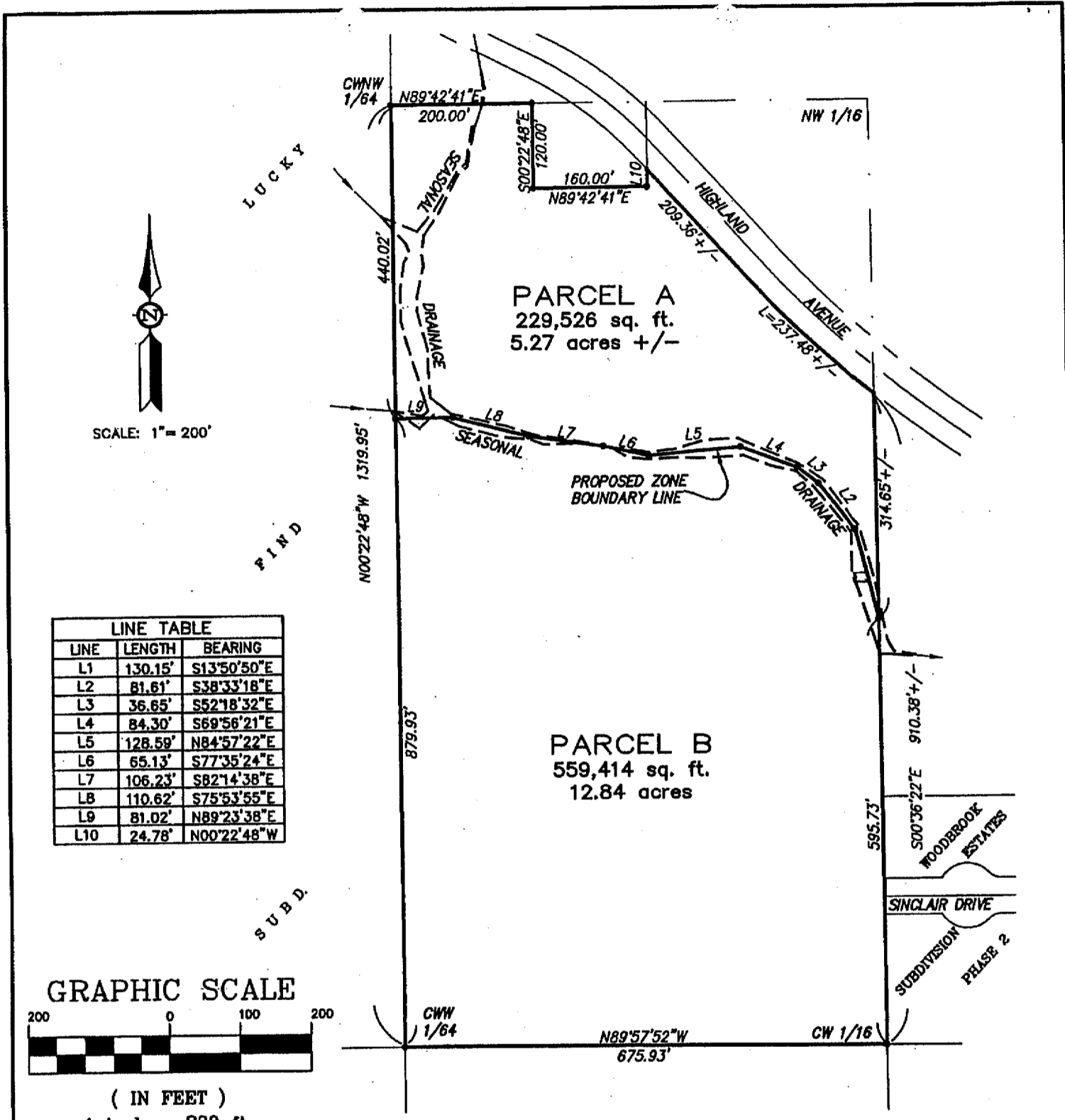
BEGINNING at the Northwest corner of said East Half of the Southwest Quarter of the Northwest Quarter of Section 6; thence along the north line thereof, North 89°42'41" East, 200.00 feet; thence leaving said north line parallel to the west line of said East Half, South 00°22'48" East, 120.00 feet; thence parallel to said north line, North 89°42'41" East, 160.00 feet; thence parallel to said west line, North 00°22'48" West, 24.78 feet, more or less, to the southerly right of way line of Highland Avenue; thence along said southerly line 447 feet, more or less, to the east line of said East Half; thence along said east line 314 feet, more or less, to a point that bears North 00°36'22" West, 595.73 feet from the Southeast corner of said East Half; thence leaving said east line, North 13°50'50" West, 130.15 feet; thence North 38°33'18" West, 81.61 feet; thence North 52°18'32" West, 36.65 feet; thence North 69°56'21" West, 84.30 feet; thence South 84°57'22" West, 128.59 feet; thence North 77°35'24" West, 65.13 feet; thence North 82°14'38" West, 106.23 feet; thence North 75°53'55" West, 110.62 feet; thence South 89°23'38" West, 81.02 feet to the west line of said East Half; thence along said west line, North 00°22'48" West, 440.02 feet to the BEGINNING, containing 5.27 acres, more or less.

PARCEL B

(A portion of Tax Lot 1400, Assessor's Map No. 36-05-06-00)

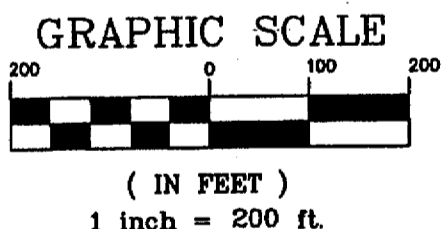
Description for a tract of land situated in the East Half of the Southwest Quarter of the Northwest Quarter of Section 6, Township 36 South, Range 5 West of the Willamette Meridian, Josephine County, Oregon, being more particularly described as follows:

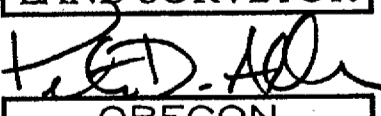

Commencing at the Northwest corner of said East Half of the Southwest Quarter of the Northwest Quarter of Section 6; thence along the west line of said East Half, South 00°22'48" East, 440.02 feet to the POINT OF BEGINNING; thence leaving said west line, North 89°23'38" East, 81.02 feet; thence South 75°53'55" East, 110.62 feet; thence South 82°14'38" East, 106.23 feet; thence South 77°35'24" East, 65.13 feet; thence North 84°57'22" East, 128.59 feet; thence South 69°56'21" East, 84.30 feet; thence South 52°18'32" East, 36.65 feet; thence South 38°33'18" East, 81.61 feet; thence South 13°50'50" East, 130.15 feet to the east line of said East Half; thence along said east line, South 00°36'22" East, 595.73 feet to the Southeast corner of said East Half; thence along the south line of said East Half, North 89°57'52" West, 675.93 feet to the Southwest corner of said East Half; thence along the west line of said East Half, North 00°22'48" West, 879.93 feet to the POINT OF BEGINNING, containing 12.84 acres, more or less.



SCALE: 1" = 200'

LINE TABLE		
LINE	LENGTH	BEARING
L1	130.15'	S13°50'50"E
L2	81.61'	S38°33'18"E
L3	36.65'	S52°18'32"E
L4	84.30'	S69°56'21"E
L5	128.59'	N84°57'22"E
L6	65.13'	S77°35'24"E
L7	106.23'	S82°14'38"E
L8	110.62'	S75°53'55"E
L9	81.02'	N89°23'38"E
L10	24.78'	N00°22'48"W



<p>REGISTERED PROFESSIONAL LAND SURVEYOR</p>  <p>OREGON JULY 10, 1996 PETER D. ALLEN 2757</p> <p>RENEWAL: DECEMBER 31, 2007</p>	<p>Peter D. Allen Land Surveying 321 N.W. "A" Street Grants Pass, Oregon 97526 541-476-4502</p>	
	<p>Map of Proposed Zone Line Change</p> <p>LOCATED IN Map No. 36-05-06, Tax Lot 1400 SW 1/4 of the NW 1/4 of Section 6 Township 36 South, Range 5 West, W.M. Josephine County, Oregon SURVEY FOR Highland Sinclair, LLC Grants Pass, Oregon</p>	

City of Grants Pass
Economic Opportunities Analysis

October 2006

(Revised January 2007)

CRAIG A. STONE & ASSOCIATES, LTD.
Consultants in Urban Planning, Economic Analysis, Development

712 Cardley Avenue • Medford, Oregon 97504-6124
Telephone: (541) 779-0569 • Fax: (541) 779-0114 • E-mail: cstone@cstoneassociates.com

EXHIBIT A

*To Ordinance
5394*

City of Grants Pass
Economic Opportunities Analysis

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(Revised January 2007)

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I

Introduction

Purpose and Scope:

This Economic Opportunities Analysis is offered for inclusion by minor amendment into the City of Grants Pass Comprehensive Data Base with regard to the inventory of employment land. The study has been prepared in support of a request for minor amendment to the City of Grants Pass Comprehensive Plan Data Base, Comprehensive Plan Land Use Map, and Zoning Map and pursuant to OAR 660-009-0015. The Economic Opportunities Analysis assesses the need requirement for employment lands through the planning period, and then assesses whether the community has an inventory of employment land sufficient to meet the demand. Methods recommended for the preparation of an Economic Opportunities Analysis are further explained in the guidebook *Industrial and Other Employment Lands Analysis—Basic Guidebook 2005* provided by the Department of Land Conservation and Development (DLCD).

Results of Study:

1. Supply: Employment land in Grants Pass is in plentiful supply over the twenty-year planning horizon. The largest supplies of available employment lands are in the general commercial (206 acres) and business park (40 acres) zoning districts.
2. Consumption Trend and Projection: By 2026, the City of Grants Pass is expected to consume 67 of 77 available acres of industrial land. Table 1 presents the results of this available lands inventory.

3. The primary driver of the demand for employment lands is the growth in population, which in Josephine County is entirely a result of in-migration. The Population Element of the City of Grants Pass Comprehensive Plan was last updated based on data available through the year 1992. The planning horizon for that study was projected only through the year 2010. At that time, it was projected that the population for all areas within the Urban Growth Boundary would be 33,764 by the year 2010. The current population within the Urban Growth Boundary is estimated at 36,702. The Population Element does not provide a projection over the next twenty year planning horizon (i.e., through the year 2026). For this study, a 2026 population projection for the entire county was extrapolated from the projected 2025 population for Josephine County as published by the Oregon Office of Economic Analysis (OEA) in its document entitled State and County Forecasts and Components of Change, 2000 to 2040). The 2025 population projected by the OEA for Josephine County is 100,001 residents. Extrapolated on a linear trend, the 2026 population for the county is 100,100. We have assumed conservatively¹ that the City of Grants Pass will accommodate 73 percent of future population growth in Josephine County. 14,949 additional people are expected to occupy the area within the Grants Pass UGB in 2026, a total of approximately 51,651 residents.
4. Conclusion: Based on this analysis, industrial land supply is adequate to supply the expected demand for 23.2 years and the commercial land supply is adequate to supply the expected demand for 15.6 years.

¹ The population for the incorporated area within the City of Grants Pass increased by 2,915 between the years 2000 and 2005 based on certified estimates of the Oregon Center for Population Research and Census (CRPC). The population gain for Josephine County as a whole over the same period was 3,595. The City's share of the countywide population increase was 81 percent between 2000 and 2005. Because the County and City have not coordinated a population allocation plan through the planning horizon, a more conservative assumption that only 73% of population would be allocated to Grants Pass over the planning horizon.

Tables – Data Summary

Table 1:

Lands Available for Development in Grants Pass Oregon				
<small>Prepared by Craig Stone and Associates using tax assessors data from April, 2006</small>				
	Net Available Acres	Population/Employment Increase	Land Requirement	Supply/Demand in Years
Commercial	209	157	268	186
Industrial	77	81	67	113
Medium and High Density Residential	160	172	681	237
Low Density Residential	337	224	1428	237
Grand Total	784	544	2109	200

Note: Population increase for Commercial and Industrial categories represents employment increase.
 Note: Supply/Demand represents years supply currently available. 20 years would indicate a balanced market

Table 2:

Summary of Available Lands by Zoning Designation Prepared by Craig Stone and Associates Using Assessors Data from 4/1/2006		
Density	Zoning Designation	Net Available Acres
Commercial	CBD	2
Commercial	GC	206
Commercial	NC	1
Industrial	BP	40
Industrial	I	27
Industrial	IP	10
Industrial	RI	1
Low Density Residential	R-1-10	95
Low Density Residential	R-1-12	104
Low Density Residential	R-1-12, RR-5	2
Low Density Residential	R-1-8	107
Moderate Density Residential	R-1-6	9
High Density Residential	R-2	85
High Density Residential	R-3	65
High Rise Density Residential	R-4	1
Total Acres		784

Note: R-1-12,RR is a split zone parcel

Note that the totals reported for residential land categories round down to 160 acres for "Medium and High Density Residential" and 337 acres for "Low Density Residential".

Table 3:

Employment Density	
Prepared by Craig Stone and Associates using DLCD Data	
Building Category	Jobs Per Acre
Institutional/Other	10
Industrial	12
Commercial	20

Source: DLCD Basic Guidbook pg 2-11

III

Methodology

A. Definitions

Constrained Land

Lands containing slopes over 30%, wetlands, within 20 feet of water or within 75 feet of the Rogue River are constrained. The constraint parameter reflects standards of the Grants Pass Land Development Code as described in the methodology below.

Employment Land

Employment lands are assumed to be so if they have a zoning designation of commercial or industrial in the Josephine County tax assessor's master data set.

Housing Density

Housing Density is the number of dwelling units per acre. This number is calculated by dividing the number of housing units constructed since the year 2000 by the number of

gross acres consumed. It is assumed that the acreage on which these units currently exist represents the net acreage consumed and that the gross acreage is the land consumed divided by (one minus) the requirement for public facilities.

Public Land

Federal, State, County, City, School, cemeteries and private streets were considered public lands, unavailable for development.

Vacant Employment Land

On January 1, 2007, revisions to Oregon Administrative Rules Chapter 660, Division 9 adopted by the Land Conservation and Development Commission on December 13, 2005 will be in effect which, in pertinent part, will establish the following definition at OAR 660-009-0005:

“(14) ‘Vacant Land’ means lot or parcel: (a) Equal to or larger than one half-acre not currently containing permanent buildings or improvements; or (b) Equal to or larger than five acres where less than one half-acre is occupied by permanent buildings or improvements.”

The term is not defined in the current version of the rule, and we decline to use it as defined above for the reason that the methodology will significantly overestimate the inventory of readily available employment land and also because the definition is not consistent with the Josephine County Tax Assessor’s designations of “Potential Development” and “Vacant”. Our method for identifying vacant employment lands is based upon using the best available data, and we believe assessor’s definition of vacant to be best available data. Non-structural improvements of employment land as identified by site survey, permit records, aerial photos, and assessment records found to be integral to associated businesses were not considered vacant. Parking lots are a good example of occupied parcels without buildings which nevertheless serve as integral parts of neighboring businesses. Under the Division 9 methodology effective on January 1, 2007, by deeming land currently employed for beneficial economic use “vacant”, the analysis would falsely yield a larger inventory of available commercial and industrial lands than

actually exists. Based on our more conservative methodology in which land without improvements which is still serving an obvious economic purpose are not considered “vacant”, we have concluded that 15.6 years of commercial land and 23.2 years of industrial land supply is available to meet expected demand.

B. The Residential Inventory

An analysis of the residential land inventory is provided separately in the document entitled *City of Grants Pass Available Residential Land Study (October 2006)*, prepared by Craig A. Stone & Associates, Ltd.

C. Employment Lands- Conducting an Economic Opportunities Analysis

Step 1

Summarize National, Regional, State and Local economic trends and forecast Employment.

Appendix G, attached hereto, includes the following national, regional, state, and local economic trends and employment forecast information:

Oregon Department of Administrative Services:

- Executive Summary and Part I (Economic Forecast) of *Oregon Economic and Revenue Forecast – September 2006, Volume XXVI, No. 3*, prepared by the Office of Economic Analysis (State of Oregon), summarizing the national and state economic trends and forecasts.

Oregon Employment Department WorkForce Analysis summarizing regional and local economic trends and forecasts:

- *Regional Profile Industry Employment in Region 8*, issued in 2004;
- *Regional Profile – Labor Force, Employment and Unemployment in Region 8*, issued in 2004;

- Workforce and Economic Research – Josephine County (1994-2005) issued in 2005;
- Employment Projections by Occupation 2004-2014, Region 8 (Jackson and Josephine Counties) issued September 2005

Step 2

Estimate land requirement by type of land and parcel size required to accommodate the forecast of Employment

Our analysis, based on the foregoing data, summarized in Table 1, shows a total land requirement of 2109 acres over the next 20 years. For employment lands, land requirements are calculated according to the requirements of OAR 660-09-0015 and using methods recommended in the Industrial and Other Employment Lands Analysis—Basic Guidebook 2005 provided by DLCD.

The amount of employment land necessary to provide for a given number of jobs is a ripe field for further research where little substantive research has been done. DLCD has provided guidelines in the Industrial and Other Employment Land Analysis—Basic Guidebook 2005. For our analysis, the DLCD recommended employment density assumptions have been applied to the forecast of new employment which was extrapolated from the OEA population forecast. The number of jobs projected within the planning area through the Year 2026 has been derived through the following equation:

$$[(\text{No. of Jobs in Year 2006}) / (\text{Population in Year 2006})] \times (\text{Population forecasted for Year 2026}) = \text{Forecasted Jobs in Year 2026}$$

To estimate the land requirement by type of land through the Year 2026, the equation is:

$$(\text{Forecasted Jobs in Year 2026}) / (\text{Jobs per Acre}) = \text{Land Requirement.}$$

DLCD guidelines were assumed to determine the Jobs per Acre variable, as summarized in Table 3. The variables and resulting acreages are shown in Table 1 relating to land requirements for industrial and commercial purposes.

Step 3

Inventory available lands

Vacant employment lands were determined using Josephine County Tax Assessor's Master File in combination with GIS data produced by the Josephine County Planning Department.

Parcels were assumed to be vacant if the Tax Assessor has assigned no real market value to structures unless an active commercial non-structural use was identified. Activities on industrial lands which may be critical to the function of a business may require that no structure is present. Log decks, for example, appear to be vacant parcels in the tax lot data base but are necessary and permanent parts of going concerns. Occupied industrial lands without structures were identified using aerial photos from the Josephine County GIS website. The following lands were removed from the vacant industrial lands category:

- Wood products yards
- Wrecking and salvage yards
- Stone and Clay Products
- Industrial Flex Buildings (parcels with)
- Golf Course
- Warehouse/Manufacturing
- Parking
- Miscellaneous Industrial Use
- Log decks, van storage, industrial yards

Similarly, parking facilities on commercial land is an outdoor use and is often located on parcels adjacent to commercial buildings. Parking lots are not considered available for development because of their importance to surrounding developed parcels. Using aerial photos, parking lots were identified and deleted from the available commercial lands. Outdoor van storage or similar freight management activities were assumed to take place on occupied property, despite the lack of buildings.

Appendices E and F herein provide an inventory of lands actively employed in commercial or industrial use without structures.

Using GIS software, constrained lands were identified by overlaying maps of environmental land constraints on the map of vacant and re-developable parcels. Portions of parcels identified to have constraints were removed, and parcel acreage was recalculated.

- Slopes- DLCD regards slopes over 25% to be un-buildable² for the purpose of calculating the land inventory while recognizing that it is possible to build on slopes greater than 25%.
- Wetlands- wetlands were not assumed to be available for development pursuant to Grants Pass Development Code 24.345.
- Water- a 20 foot setback requirement was assumed for all creeks and drainages as per Grants Pass development code section 24.341. A 75 foot setback was assumed for the Rogue River, as per the same section of the code.
- Public lands- School, City, County, State and Federally owned land was not assumed to be available for development. Cemeteries were also not assumed to be available for development (OAR 660-08-005(13)).

After removing areas with environmental constraints, the acreage of buildable land was recalculated for every parcel.

Step 4

Assess community economic development potential

The WorkForce Analysis prepared by the Oregon Employment Department for Region 8 (Jackson and Josephine Counties) provides the following assessment regarding economic development potential.

- Economic activity in Josephine County is expected to mirror recent trends in Jackson County over the planning horizon. The most important factor driving these trends is strong population growth, especially among retired in-migrants. An aging population has implications for labor force growth because labor force participation is lower for older residents. The labor force is expected to grow more slowly than the overall population. This will increase the demand for services to meet the needs of retired-aged groups. Particularly, the demand for services such as assisted living, adult foster care facilities, health care, and social services will increase.
- Service industries are expected to account for one-half of the region's job growth, led by health services which will increase by 31.5 percent.
- The fastest growing manufacturing sectors are expected to be "other durable goods"² and "food and kindred products".
- Other employment sectors, including retail, wholesale, and professional services are forecasted to increase over the next ten years, tracking closely along with forecasted population growth.
- Manufacturing employment fell by nine percent for the 1995-2004 period in Region 8. Because the region has a fairly resilient manufacturing mix, the

² Non-lumber or wood

Oregon Employment Department forecasts a three percent increase in employment in this sector over the next ten years. This growth will be led by small local manufacturers that can react nimbly to changing products, technologies, and markets

- Large lumber and wood products manufacturing will decline by 13.1 percent.

IV

Conclusions

Grants Pass has an adequate supply of employment land over the planning horizon to accommodate the forecasted population growth sector needs. Changes in the economy or community desires may require re-allocation and management of the employment land inventory over time.

Appendices C and D herein identify the inventory of available commercial and industrial lands within the City of Grants Pass urbanizable area. Industrial and commercial sites in a variety of sizes that are well served by utilities and good freeway access are clustered in the south and southeastern portions of the city. Industrial land in the north are at a comparative disadvantage generally to sites near the south interchange area due to transportation and topographic constraints affecting the north industrial area. The north industrial area will be suited to firms that do not require high visibility and that are not heavily dependent upon freight or commercial access. Wholesale and trade services, such as storage and mechanical repair are ideal uses for commercial and industrial sites on the north side of town. Outside of Grants Pass, close to the airport, the economy also has large reserves of industrial land for the slow growing durable goods manufacturing sector.

The supply of residential land is severely limited to meet even short term demand. The availability of residential land is a decision factor for prospective employers with regard

to site selection. Residential price increases have a corrosive effects which tend to decrease in-migration, increase out-migration and decrease employment. These effects can be expected long before the supply of residential land reaches zero as the market requires a degree of liquidity in order to function properly. Insufficient residential land supply can adversely impact economic opportunities due to increases in the cost of rent (housing). These declines are not accounted for in the analysis presented above because the assumption is made that additional residential lands will be allocated. However, it is strongly recommended that the City consider increasing the available supply of residential land by either expanding the Urban Growth Boundary, re-designating non-residential lands for residential use, increasing densities and variety of housing types in appropriate areas, or a combination of these options in the very near future.

Appendix A

Bibliography

1. Industrial and Other Employment Lands Analysis—Basic Guidebook 2005
2. Josephine County GIS Data
 - Wetlands
 - Water
 - Steep Slopes
 - Taxlots
 - GPS Roads
 - Aerial photos
3. Josephine County Tax Assessors data
 - Master.dbf- August 18, 2006
4. OAR 660-09-0015
5. Oregon Economic and Revenue Forecast, September 2006 Volume XXVI, No. 3

Appendix B

OAR 660-009-0015

660-009-0015

Economic Opportunities Analysis

Cities and counties must review and, as necessary, amend their comprehensive plans to provide economic opportunities analyses containing the information described in sections (1) to (4) of this rule. This analysis will compare the demand for land for industrial and other employment uses to the existing supply of such land.

(1) Review of National, State, Regional, County and Local Trends. The economic opportunities analysis must identify the major categories of industrial or other employment uses that could reasonably be expected to locate or expand in the planning area based on information about national, state, regional, county or local trends. This review of trends is the principal basis for estimating future industrial and other employment uses as described in section (4) of this rule. A use or category of use could reasonably be expected to expand or locate in the planning area if the area possesses the appropriate locational factors for the use or category of use. Cities and counties are strongly encouraged to analyze trends and establish employment projections in a geographic area larger than the planning area and to determine the percentage of employment growth reasonably expected to be captured for the planning area based on the assessment of community economic development potential pursuant to section (4) of this rule.

(2) Identification of Required Site Types. The economic opportunities analysis must identify the number of sites by type reasonably expected to be needed to accommodate the expected employment growth based on the site characteristics typical of expected uses. Cities and counties are encouraged to examine existing firms in the planning area to identify the types of sites that may be needed for expansion. Industrial or other employment uses with compatible site characteristics may be grouped together into common site categories.

(3) Inventory of Industrial and Other Employment Lands. Comprehensive plans for all areas within urban growth boundaries must include an inventory of vacant and developed lands within the planning area designated for industrial or other employment use.

(a) For sites inventoried under this section, plans must provide the following information:

(A) The description, including site characteristics, of vacant or developed sites within each plan or zoning district;

(B) A description of any development constraints or infrastructure needs that affect the buildable area of sites in the inventory; and

(C) For cities and counties within a Metropolitan Planning Organization, the inventory must also include the approximate total acreage and percentage of sites within each plan or zoning district that comprise the short-term supply of land.

(b) When comparing current land supply to the projected demand, cities and counties may inventory contiguous lots or parcels together that are within a discrete plan or zoning district.

(c) Cities and counties that adopt objectives or policies providing for prime industrial land pursuant to OAR 660-009-0020(6) and 660-009-0025(8) must identify and inventory any vacant or developed prime industrial land according to section 3(a) of this rule.

(4) Assessment of Community Economic Development Potential. The economic opportunities analysis must estimate the types and amounts of industrial and other employment uses likely to occur in the planning area. The estimate must be based on information generated in response to sections (1) to (3) of this rule and must consider the planning area's economic advantages and disadvantages. Relevant economic advantages and disadvantages to be considered may include but are not limited to:

- (a) Location, size and buying power of markets;
- (b) Availability of transportation facilities for access and freight mobility;
- (c) Public facilities and public services;
- (d) Labor market factors;
- (e) Access to suppliers and utilities;
- (f) Necessary support services;
- (g) Limits on development due to federal and state environmental protection laws; and
- (h) Educational and technical training programs.

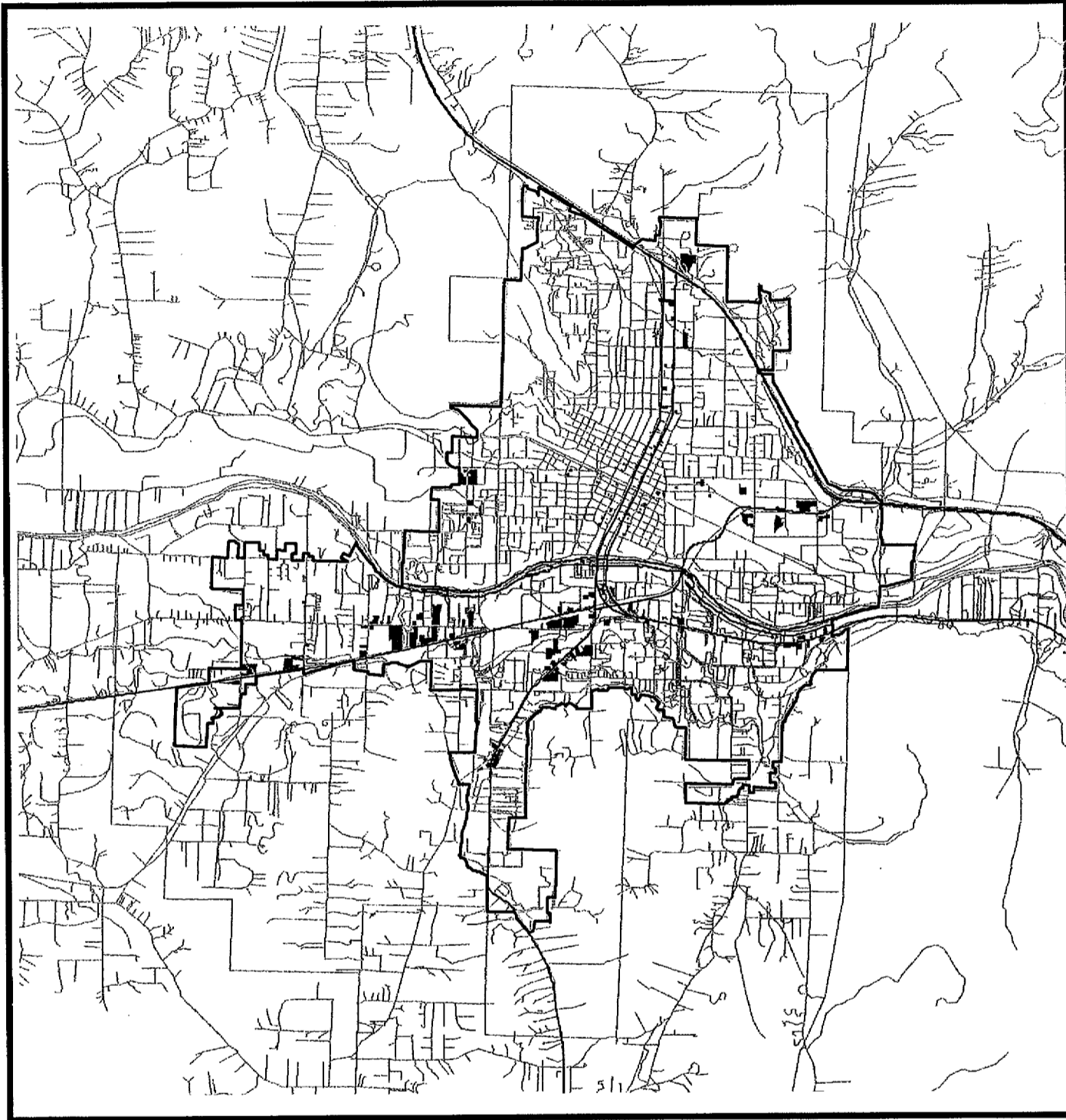
(5) Cities and counties are strongly encouraged to assess community economic development potential through a visioning or some other public input based process in conjunction with state agencies. Cities and counties are strongly encouraged to use the assessment of community economic development potential to form the community economic development objectives pursuant to OAR 660-009-0020(1)(a).

Stat. Auth.: ORS 183 & 197

Stats. Implemented: ORS 197.712

Hist.: LCDC 4-1986, f. & ef. 10-10-86; LCDD 7-2005, f. 12-13-05, cert. ef. 1-1-07

Appendix C
Available Commercial Property



■ Available Commercial Lands
 □ Grants Pass UGB

Available Commercial Property
 Source: Josephine County Assessor

September 30, 2006

Craig Stone and Associates

2000 0 2000 4000 6000 8000 Feet

Available Commercial Properties in Grants Pass Oregon

Prepared by Craig Stone and Associates based on Josephine County Tax Assessor's Data and Josephine County GIS Data

Map and Tax Lot	Name of Owner	Zoning	Acres
360517DA00070000	A & F GRANTS PASS L	GC	2.21
360624DC00160000	ALLEN CREEK CENTER	GC	0.90
360624DC00180000	ALLEN CREEK CENTER	GC	1.91
360624DC00180100	ALLEN CREEK CENTER	GC	0.47
360518AD01150000	AMER LEGION GP POST	CBD	0.11
360518DC00460000	AMJO, LLC	NC	0.15
360518DC00470000	AMJO, LLC	NC	0.12
360520CB00670000	AMNEUS, RICHARD H &	GC	0.39
360519AD00130000	ANDERSON, LOIS	GC	0.23
360518DA00460000	ANDROY, ROBERT M II	CBD	0.11
360517CB00920000	ARANA, MARCELLA T	GC	0.11
360519CD00170100	ASANTE	GC	2.13
360508BC00031700	ASANTE	GC	0.11
360508BC00031400	ASANTE	GC	0.10
360508BC00031200	ASANTE	GC	0.16
360508BC00031300	ASANTE	GC	0.10
360508BC00030900	ASANTE	GC	0.12
360508BC00030800	ASANTE	GC	0.11
360519CD00090300	ASANTE	GC	0.74
360519CD00090000	ASANTE	GC	0.86
360519CD00090400	ASANTE	GC	0.52
360519CD00090500	ASANTE	GC	0.37
360519CD00090600	ASANTE	GC	0.28
360519CD00090200	ASANTE	GC	0.53
360518DD00420000	AUSLAND HOLDINGS LL	GC	0.10
360518DD00430000	AUSLAND HOLDINGS LL	GC	0.14
360517CB00030100	AUSLAND, JENNIFER &	GC	0.08
360517CB00280000	AUSLAND, JENNIFER &	GC	0.45
360519DB00410000	AYLING REV TRUST, J	GC	0.91
360508CD00930000	BAKER, BUCK N &	GC	0.28
360516DC00050000	BALLINGER, VELMA C	GC	1.55
360519DA00350300	BASSETT, DAVID A	GC	0.63
360519DA00370300	BASSETT, DAVID A &	GC	0.75
360517CC01440000	BAYLESS FAMILY TRUS	GC	0.12
360624CD00040900	BEAVER MARSH PROPER	GC	0.85
360624CD00040800	BEAVER MARSH PROPER	GC	0.98
360624CD00040700	BEAVER MARSH PROPER	GC	1.16
360624CD00040200	BEAVER MARSH PROPER	GC	0.84
360624CD00040600	BEAVER MARSH PROPER	GC	0.99
360624CD00040300	BEAVER MARSH PROPER	GC	1.03
360624CD00040500	BEAVER MARSH PROPER	GC	1.41
360518DA00470000	BECK, BERNADETTE	CBD	0.10
360519AD00090000	BELL, HERBERT R &	GC	0.17
360518DD00550000	BETETA, JOE &	GC	0.28
360613DD00070000	BICE TRUST, TOM J &	GC	0.33
360521D000070000	BINGHAM, HARRY	GC	0.47
360521CD00050000	BJERRE, JACOB M & G	GC	0.78

Available Commercial Properties in Grants Pass Oregon

Prepared by Craig Stone and Associates based on Josephine County Tax Assessor's Data and Josephine County GIS Data

Map and Tax Lot	Name of Owner	Zoning	Acres
360516DC00060000	BOERSMA BROS LLC	GC	0.44
360516DC00090000	BOERSMA BROS LLC	GC	0.11
360623DD00010000	BORMUTH, TOMMY W &	GC	0.41
360519DC00170000	BOYER, DONALD W TRU	GC	1.03
360519DC00030000	BRAINWASH LLC	GC	0.10
360518DD00440000	BRIDGES FAMILY TRUS	GC	0.10
360530BA00080000	BRISENO, ROBERT J	GC	0.74
360624CC00080000	BROWN, IRENE D &	GC	0.76
360517AC00650000	BROWN, PATRICK W &	GC	0.18
360518DD00900000	BRUBAKER, STEPHANIE	GC	0.15
360613D000090000	BRUTON, ROBERT A &	GC	2.86
360624CB00290000	BUEHNER, HEIDI RENA	GC	0.88
360626B000060000	BUNTIN CONSTRUCTION	GC	4.81
360626B000010100	BUNTIN CONSTRUCTION	GC	0.54
360521CD00060000	BURKEY, KATHLEEN A	GC	0.55
360518DB00280000	BURTON, BRUCE &	NC	0.10
360517CB00930000	BURTON, GARY L &	CBD	0.11
360613DD00030000	CATTERALL, CRAIG J	GC	1.24
360508BD00020400	CHIERICHETTI, PAUL	GC	0.19
360613DA00060000	CHURCH OF CHRIST	GC	0.47
360508BA00040600	COLEMAN PROPERTIES	GC	0.17
360520CA00450000	COLLINS, WADE L &	GC	0.76
360517AC00090000	COLVIN STATIONS INC	NC	0.16
360530CB00200000	COMBE FAMILY TRUST	GC	0.97
360530C000150000	COMBE, DAVID BUD &	GC	0.50
360519AD00150000	CONGER RESIDUAL DIS	GC	0.41
360519AD00250000	CONGER RESIDUAL DIS	GC	0.10
360517CC00680000	COURIER PUBLISHING	GC	0.19
360517CC00700000	COURIER PUBLISHING	GC	0.15
360518DD00840000	COWGILL, DAVID L &	GC	0.06
360624CD00030000	CRAMER FAMILY TRUST	GC	1.57
360624CD00160000	CRAMER FAMILY TRUST	GC	0.07
360626B000130100	CRAMER FAMILY TRUST	GC	1.53
360518DD01150000	CUBIT CONSTRUCTION	GC	0.22
360520CB00620000	DESOLMINIHAC, PIERR	GC	0.04
360519AD00110000	DOLLARHIDE, WAYNE O	GC	0.62
360626B000130000	DRURY, PATRICK S &	GC	0.87
360530BA00120300	EAGLE RIDGE DEVELOP	GC	0.88
360530BA00120200	EAGLE RIDGE DEVELOP	GC	1.40
360508CA00340000	EVENSEN, WILLIAM E	GC	0.15
360530BA00010000	EVERGREEN FEDERAL B	GC	1.19
360613DD00080000	EWERS, GIDEON B	GC	0.61
360519DB00330500	F & D WHEELER FAMIL	GC	3.47
360624DC00100100	FAHEY REALTY LLC	GC	3.04
360624DB00230000	FAHEY, SUSAN R &	GC	0.31
360517CA00310100	FASZER, DWIGHT &	GC	0.23
360530C000180200	FEDERAL INVESTMENT	GC	0.89

Available Commercial Properties in Grants Pass Oregon

Prepared by Craig Stone and Associates based on Josephine County Tax Assessor's Data and
Josephine County GIS Data

Map and Tax Lot	Name of Owner	Zoning	Acres
360530BA00120100	FEDOSKY, DAVID V &	GC	1.83
360517BA00470000	FIRE SERVICE RESEAR	GC	0.19
360530CB00160000	FIRE SERVICE RESEAR	GC	0.68
360624CA00070100	FISHER, ROBERTA L	GC	0.67
360518DD01020000	FLENNER, JOHN &	GC	0.19
360520CB00890000	FORD TRUST, DONALD	GC	0.34
360521CD00360000	FORNELLI, THELMA LE	GC	0.71
360516CC00010100	FOSTER CREEK LLC	GC	2.00
360517CB00910000	FRALICH, JOHN L &	GC	0.12
360520CB00840000	FRANCO, RUDOLPH R &	GC	0.03
360517D000080100	FREEDMAN, STUART I	GC	0.31
360520CA00230000	FRUITDALE GRANGE	GC	0.08
360626B000150000	FUTUREQUEST COMPANY	GC	0.67
360517DD00010100	G P VENTURES LLC	GC	4.61
360623CA00020100	GARCIA, JUAN CARLOS	GC	0.23
360508BB00060200	GEORGE, JUSTIN V &	GC	0.49
360519DC00310000	GIBSON, DELMA JEAN	GC	2.45
360519DC00290000	GOETJEN REV TRUST,	GC	0.32
360624DB00100000	GOODLETT TRUST, DON	GC	0.50
360517BA00430000	GRALO CORP	GC	0.26
360613C000030200	GRANTS PASS BROADCA	EF	0.36
360623DB00110200	GRIFFITH, MELVIN B	GC	0.21
360519DB00430000	GUERRERO, BERNABE &	GC	0.26
360520CB00680000	GUERRERO, EMILIO &	GC	0.33
360517BB00110000	H2 HOLDINGS LLC	GC	0.25
360624CB00140000	HALL, BRYAN R &	GC	0.34
360521CD00070000	HAMILTON, CHARLES D	GC	0.27
360521CC00200200	HARRIS, DONNA JENE	GC	0.74
360521CC00050000	HART, MICHAEL J &	GC	0.22
360624CB00280000	HART, THOMAS R JR &	GC	0.88
360520CB00610000	HARTSONS LLC	GC	0.04
360519CA00190000	HATCH, CLYDE L & HE	GC	0.42
360521CD00330000	HATCH, KELLEY &	GC	1.03
360519AD00280000	HENDERSON, THOMAS W	GC	1.03
360530BA00070000	HENDRICKSON FAMILY	GC	0.23
360517CC00470000	HEYER, ROBERT J &	CBD	0.11
360625DD00150000	HICKS, SCOTT A &	GC	0.24
360518DD00270000	HOFMANN, MARGARET A	GC	0.12
360520CA00340000	HONEYCUTT, ROBERTA	GC	0.14
360627AA00050000	HORIZON SENIOR COMM	GC	1.65
360624CC00020000	HUERTA, ROBERT HENR	GC	1.92
360520CB00790000	HYDE, MATTHEW L &	GC	0.19
360520CB00800000	HYDE, MATTHEW L &	GC	0.12
360520CB00800100	HYDE, MATTHEW L &	GC	0.10
360518DA00250000	ISHAM, HARVEY &	CBD	0.12
360519CA00050100	JACKSON LIV TRUST,	GC	0.11
360516DC00040000	JENSEN, ROBERT A &	GC	0.42

Available Commercial Properties in Grants Pass Oregon

Prepared by Craig Stone and Associates based on Josephine County Tax Assessor's Data and Josephine County GIS Data

Map and Tax Lot	Name of Owner	Zoning	Acres
360521CD00170000	JESINGHAUS, LINDA	GC	0.58
360519DC00300000	JONES LOVING TRUST,	GC	0.90
360624DA00100000	JOSEPHINE COUNTY	GC	3.02
360521CD00160000	JOSWICK, JAMES	GC	0.55
360613DA00080000	KARTES, ROBERT H &	GC	0.85
360623DC00340000	KEIL, RICHARD G &	GC	0.43
360516CB00240000	KELLER-FEDERAL INVE	GC	0.96
360519DB00330600	KIRKMAN, DANIEL R &	GC	1.28
360508CD00440000	KRAUSS, DAVID M, D	GC	0.24
360520CA00060000	LAND GROUP LLC	GC	2.28
360624CD00160100	LANGLEY, DONNA C TR	GC	0.18
360518DD01160000	LAUREANO, BENJAMIN	GC	0.10
360626B000040000	LEAIR, LARRY L	GC	1.19
360518DD00260000	LEET, KENDON R &	GC	0.12
360519DB00330400	LES SCHWAB TIRE CEN	GC	2.06
360624CD00130000	LEWIS, W G	GC	0.93
360517BA00600000	LIV TRUST UAD 10/11	GC	0.18
360519AC00630000	LIVESAY, LORRAINE	GC	1.46
360625DD00140000	LOWRY, JOHN F &	GC	0.43
360625DD00160000	LOWRY, JOHN F &	GC	0.21
360521CC00120000	LUCAS FAMILY TRUST,	GC	0.07
360518AC01100000	LUKER FAMILY TRUST,	NC	0.18
360518AC01100100	LUKER FAMILY TRUST,	NC	0.16
360518AC01100200	LUKER FAMILY TRUST,	NC	0.11
360520CB00870000	M & T INVESTMENTS L	GC	1.27
360520CB00880100	M & T INVESTMENTS L	GC	0.57
360517BD00320000	MACKAY, EDWARD A SR	GC	0.20
360623DD00250000	MARSH, MILLARD L &	GC	0.76
360518DB00260000	MARTIN, DANIEL E &	NC	0.15
360508CD00600000	MCCALL, HELEN J TRU	GC	0.14
360521DB00150000	MCCOY, RICHARD A &	GC	0.41
360521DB00360100	MCFEETERS, WILLIAM	GC	0.23
360519AC00620000	MEHRABIAN, ALBERT &	GC	0.99
360530BA00110000	MEHRABIAN, ALBERT &	GC	0.34
360518DB00270000	MEIGHAN, LUCILLE RO	NC	0.10
360520CA00380000	MELBY, RAYMOND M &	GC	0.07
360624CB00270000	MERKEL, DUANE E &	GC	0.31
360518DD01030000	MILLER REV TRUST, D	GC	0.19
360508CD00600200	MILLETTE, RAYMOND A	GC	0.12
360508CD00430000	MILLS, RICHARD LEWI	GC	0.49
360508CA00130000	MONNOT, FRANK D & L	GC	0.23
360518DD00380000	MORRISON FAMILY PRO	GC	0.12
360516CA00220000	MORRISON TRUST, C A	GC	2.73
360626B000010000	MORRISON TRUST, MIR	GC	1.37
360508BD00090000	MORRISON, C A TRUST	GC	0.08
360517AC00970000	MORRISON, C A TRUST	GC	1.12
360516CA00210000	MORRISON, C A TRUST	GC	1.17

Available Commercial Properties in Grants Pass Oregon

Prepared by Craig Stone and Associates based on Josephine County Tax Assessor's Data and Josephine County GIS Data

Map and Tax Lot	Name of Owner	Zoning	Acres
360521CC00090000	MURDOCK, R WENDEL	GC	0.29
360530BA00030000	NAWODYLO FAMILY TRU	GC	0.97
360517BC00210000	NEWMAN UNITED METHO	GC	0.12
360517BC00220000	NEWMAN UNITED METHO	GC	0.11
360518AD01070000	NEXT-CENTURY PROPER	GC	0.22
360521CD00180000	NOE REV LIV TRUST,	GC	0.60
360530AB00020000	NORTHRIDGE ENTERPRI	GC	0.92
360530C000160000	NUNN, RONALD C &	GC	0.13
360518DA00320000	OAKLEY, HARVEY W SR	CBD	0.13
360519DC00210100	OREGON PROPERTY HOL	GC	0.49
360520CB00860000	OSMONSON, WAYNE &	GC	0.16
360624CA00070000	PACIFIC CONF BRETHER	GC	1.14
360519DB00440000	PADGETT, VERNON D &	GC	0.18
360530C000170000	PORTER TRUST, JEAN	GC	0.66
360508CD00550000	PORTLAND LIMITED PA	GC	0.28
360508CD00560000	PORTLAND LIMITED PA	GC	0.34
360518DA00530000	PURPUREE LIV TRUST,	GC	0.08
360518DB00440000	PURPUREE, VICTOR L	GC	0.07
360518DB00440200	PURPUREE, VICTOR L	GC	0.17
360530C000200000	QSR PROPERTIES #3 L	GC	0.60
360623DD00300000	QUINTERO FAMILY TRU	GC	0.29
360626B000120000	RADIO DESIGN GROUP	GC	3.03
360518DA01090000	RAPLEY, MARK W &	CBD	0.35
360623DD00260000	READ, RAYMOND E &	GC	0.19
360624CA00160000	REDWOOD COUNTRY CHU	GC	0.62
360624CB00120000	REDWOOD GRANGE #760	GC	1.03
360517CB00010000	REEDY, CHRISTINE &	GC	0.09
360623CA00020200	RESTER, BRUCE B	GC	0.26
360624DB00090000	RILEY, DAVID &	GC	0.20
360519CA00010300	RINGUETTE LLC	GC	0.99
360521CD00190000	ROBCO INC	GC	0.96
360518DA01070000	ROBERTS JR TRUST, A	GC	0.17
360518DA01040000	ROBERTS JR TRUST, A	CBD	0.16
360505CD00010100	ROBERTS JR TRUST, A	GC	8.85
360521CD00030000	RUSSELL, KENNETH B	GC	0.44
360519DB00430100	RYDELL LOV TRUST, L	GC	0.23
360517CB00220400	SAXON FAMILY TRUST	GC	0.61
360519DB00330200	SAXON FAMILY TRUST	GC	0.70
360625DD00190000	SCROGGS, DEBRA L	GC	0.46
360613D000110100	SE ACQUISITIONS OF	GC	0.39
360623DD00320000	SHARER INVESTMENTS	GC	1.01
360623DD00290000	SHARER INVESTMENTS	GC	0.21
360623DD00310000	SHARER INVESTMENTS	GC	0.25
360518AD00600000	SHAW, CAROLE R &	GC	0.17
360519CA00170000	SHAW, ROGER A &	GC	1.47
360521CC00230000	SHRODE LIVING TRUST	GC	0.39
360508BD00060000	SIGEL FAMILY LLC	GC	4.97

Available Commercial Properties in Grants Pass Oregon

Prepared by Craig Stone and Associates based on Josephine County Tax Assessor's Data and
Josephine County GIS Data

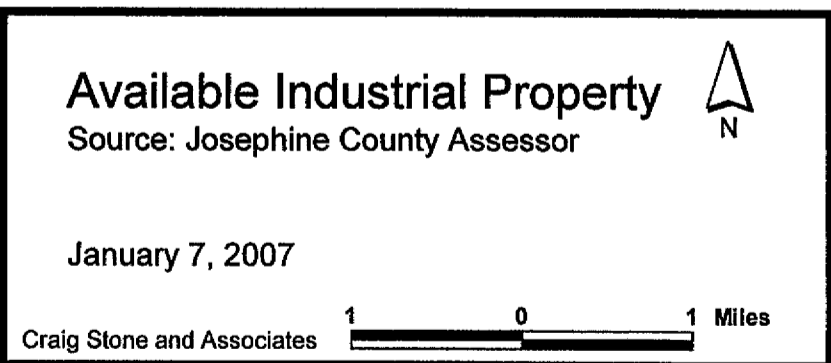
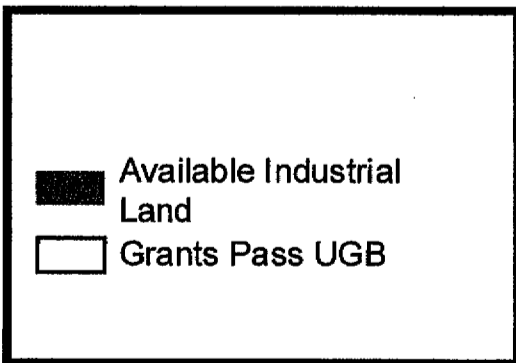
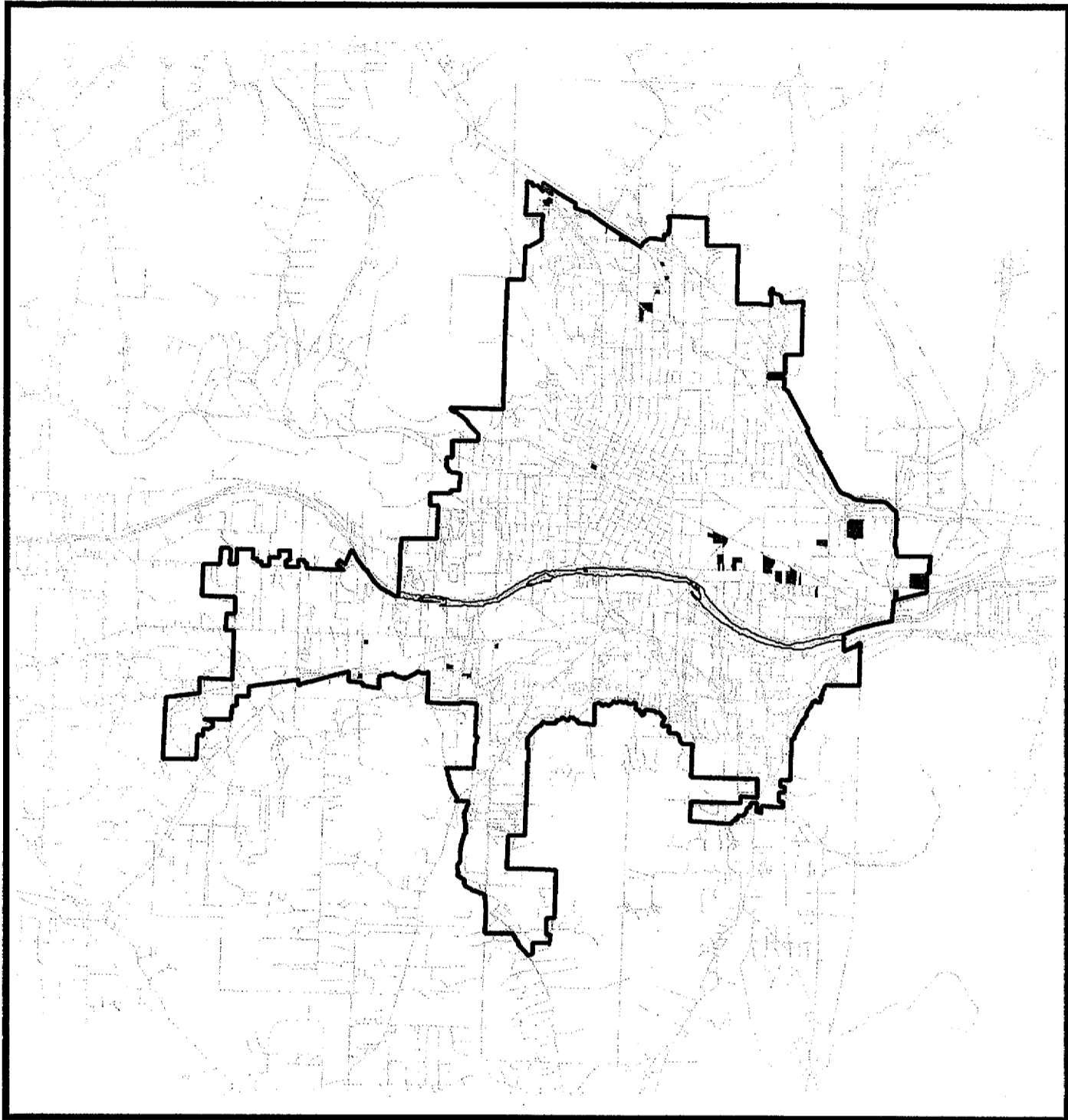
Map and Tax Lot	Name of Owner	Zoning	Acres
360613DD00050000	SILER TRUST, ORVILL	GC	1.26
360520CA00320000	SNOOK, DAVE	GC	0.41
360517BB00060000	SPEARS, FAY C & ALV	GC	0.17
360517BB00070000	SPEARS, FAY C & ALV	GC	0.15
360613DA00050000	SPICKLER, RAY L &	GC	1.96
360613DA00040000	SPICKLER, RAY L &	GC	2.39
360624DB00350000	SPRING VILLAGE RETI	GC	6.45
360517BB00080000	STACH, WALTER J & M	GC	0.14
360508BA00070100	STEIN LIV TRUST	GC	1.63
360508BA00090000	STEIN LIV TRUST	GC	0.55
360508BA00100100	STEIN LIV TRUST	GC	0.22
360519DC00190000	STEPHENS LOVING TRU	GC	2.07
360520DB00410300	STEVENS, ALAN D	GC	0.20
360520DB00410000	STEVENS, ALAN D	GC	0.23
360518AD01140000	STEVENSON, GARY ORV	CBD	0.17
360518AD00580000	STEWART, RICH	GC	0.11
360624CC00010000	STUTZMAN INVESTMENT	GC	4.96
360624CD00130100	STUTZMAN INVESTMENT	GC	4.12
360623DD00020000	SULLIVAN, DENISE M	GC	0.58
360530BA00090000	SVED, SAMUEL &	GC	0.40
360625DD00100000	TAMASHIRO PC 401K P	GC	0.23
360519AD00070000	THOMPSON, GAYE P	GC	0.15
360519CD00160200	THREE RIVERS COMMUN	GC	4.51
360517CC00500000	TORBERT, JON A &	CBD	0.11
360519CA00140000	UNION PROPERTIES LL	GC	0.93
360519CA00150000	UNION PROPERTIES LL	GC	1.95
360519CA00160000	UNION PROPERTIES LL	GC	1.06
360508BA00120200	V R INC	GC	0.53
360519AD00290000	VOIT, RONALD P	GC	0.22
360516CA00230000	WALKER, MORRISON LL	GC	1.93
360516CA00230200	WALKER, MORRISON LL	GC	1.78
360516CC00140100	WAL-MART REAL ESTAT	GC	1.19
360516CC00140000	WAL-MART STORES INC	GC	0.69
360521DB00180000	WALTERS, RUSSELL D	GC	0.44
360521DB00180100	WALTERS, RUSSELL D	GC	0.65
360521D000030000	WALTERS, RUSSELL D	GC	0.35
360508CA00160000	WATKINS LIV TRUST	GC	0.20
360530CB00170000	WATSON LIVING TRUST	GC	0.32
360530CB00180000	WATSON LIVING TRUST	GC	0.30
360518DA00510000	WEBB, THERESA V	GC	0.08
360518DD00590000	WEIDENBACH, RAY &	GC	0.16
360624CB00260100	WELCH, JAMES ELTON	GC	0.17
360517BB00270100	WELLS, PHILLIP T &	GC	0.21
360519DB00250000	WESTON, JERRY R &	GC	1.01
360520DD00110000	WIJK, HARRY T	GC	0.74
360517BB00280000	WOOD, JOAN	GC	0.10
360624DC00050200	WOODRUFF, DALE R &	GC	1.39

Available Commercial Properties in Grants Pass Oregon

Prepared by Craig Stone and Associates based on Josephine County Tax Assessor's Data and Josephine County GIS Data

Map and Tax Lot	Name of Owner	Zoning	Acres
360518DB00290000	WOOLDRIDGE, MICHAEL	NC	0.20

Appendix D
Available Industrial Property

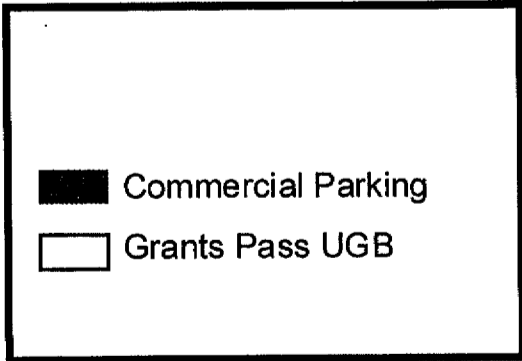
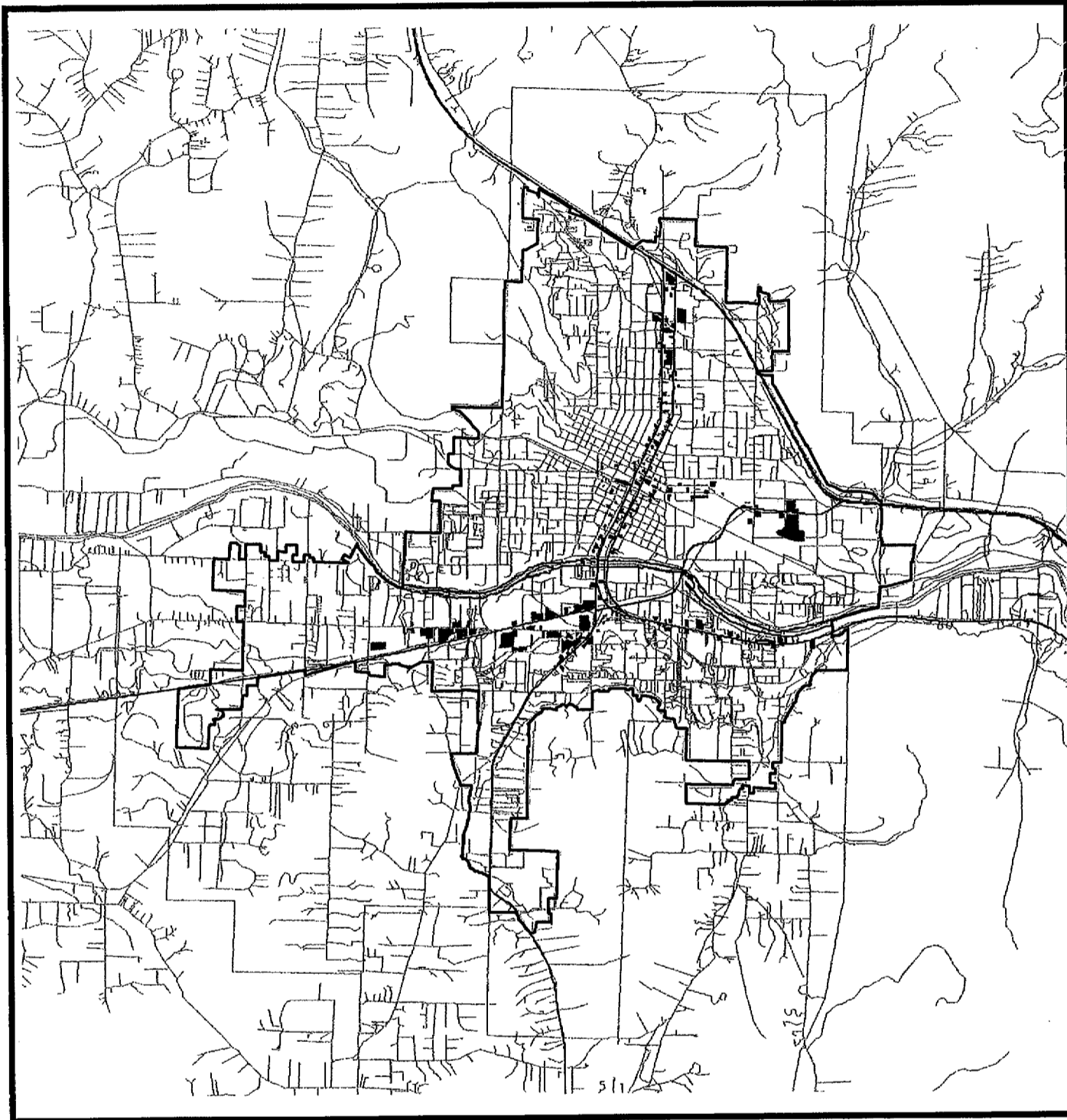


Available Industrial Properties in Grants Pass Oregon

Prepared by Craig Stone and Associates based on Josephine County Tax Assessor's Data and Josephine County GIS Data

Map and Tax Lot	Name of Owner	Zoning Designation	Acreage
360518AC00520000	AMARANTHUS, MICHAEL	I	0.86
360516CD00060000	BAIDA, FRED G &	I	2.42
360625AA00070000	BMC CAPITAL LLC	BP	1.11
360521BB00150000	CARTER, DONALD L &	BP	3.53
360624CC00090000	CASCADE ENTERPRISES	BP	0.66
360516DC00010000	CEMETERY I O O F	BP	6.17
360505CC00110000	COLEMAN PROPERTIES	BP	0.58
360517D000140000	COPELAND, ROBERT S	I	5.44
360508BB00030100	DRAKE, ROBERT ALLEN	IP	0.79
360520AB00080000	EMBURY, MAC	I	1.34
360521BD00040000	FOGG, RICHARD E &	BP	0.90
360521BB00070000	HAMLYN FAMILY LLC	BP	3.87
360521BB00130100	HANSEN, ROGER H &	BP	2.65
360517D000130000	HVALL, RANDY E	I	0.70
360506BD00060000	JBF CORPORATION	BP	2.57
360520AA00060100	JONAS, BOB &	I	1.75
360516DC00020000	MASONIC CEMETERY	BP	5.91
3605060000439000	MCKINNEY, VIRGINIA	IP	2.10
360506DB00010000	MIGNOT TRUST	IP	0.72
360626A000010000	MILLER, JAMES &	RI	0.88
360624DC00130000	NORTHRIDGE REAL EST	BP	1.49
360519CC00060400	NUNN, RONALD C &	BP	0.63
360520AB00050000	OCKENDEN, FRED	BP	1.67
360505CC00020000	PETERSON, BARRY R	BP	0.61
360506BD00040000	REDWOOD GROUP LLC &	BP	3.05
360521BB00140000	RUSSELL REV LIV TRU	BP	1.76
360522BC00060000	SPALDING & SON INC	I	2.11
3605220000040000	SPALDING & SON INC	I	9.72
360521BA00060000	TORBERT, JON A &	BP	0.94
360521BB00030000	TP GRANTS PASS LLC	I	2.43
360508BB00020100	WASHINGTON MEDICAL	IP	6.23
360520AA00070100	WILLIAMS LIVING TRU	BP	1.67

Appendix E
Commercial Parking





Commercial Parking
Source: Josephine County Assessor

September 30, 2006

Craig Stone and Associates

2000 0 2000 4000 6000 8000 Feet



Grants Pass Commercial Parking- Removed from Inventory

Prepared by Craig Stone and Associates using Josephine County Tax Assessor's Data and Josephine County Aerial Photos from County GIS

Map and Tax Lot	Name of Owner	Zoning	Acres
360517D000020400	A & F GRANTS PASS L	GC	1.31
360519CC00060700	A2H LLC	GC	1.50
360508CD00570000	ABDALLAH, PETER F &	GC	0.33
360508CA00380000	ABEL, ETHEL L	GC	0.15
360516CC00060100	ABRE LLC	GC	1.44
360519DB00280100	AGUILERA, JOE R &	GC	0.16
360517CB00620000	ALLIED CHRISTIAN FO	CBD	0.20
360519CA00130000	ANDERSON, DARRELL D	GC	0.30
360518DA00490000	ANDROY, ROBERT M II	CBD	0.13
360530AB00030000	ANIMAL CLINIC OF JO	GC	0.89
360508BC00031600	ASANTE	GC	0.11
360508BC00031500	ASANTE	GC	0.18
360519CD00090700	ASANTE	GC	1.00
360508CD00850000	ASHLEY ENTERPRISES	GC	0.11
360508CD00590100	ATKINS, CHUCK	GC	0.18
360508BD00150000	ATKINS, MELBURN L &	GC	0.42
360517D000010100	AUERBACH GRANTS PAS	GC	0.32
360517DA00080300	AUERBACH GRANTS PAS	GC	0.39
360517D000050000	AUSLAND AUSLAND REE	GC	0.34
360508BD00110200	AUTOZONE INC	GC	0.31
360519DC00210000	AUTOZONE INC	GC	0.94
360519DA00030000	BAKSHAS LOVING TRUS	GC	0.58
360520CB00660000	BARNES, GEORGE S &	GC	0.18
360508CD00580000	BARNSTORMERS LITTLE	GC	0.20
360518AD01259000	BAUER GP LLC	GC	0.06
360518DD00340000	BAUER REV LIV TRUST	GC	0.22
360518DD00330000	BAUER REV LIV TRUST	GC	0.13
360520DD00060000	BEAIRSTO, JOHN R JR	GC	0.22
360624CD00040100	BEAVER MARSH PROPER	GC	2.02
360518DA00500000	BECK, BERNADETTE	CBD	0.11
360517BA00380000	BEHYMER, KENNETH W	GC	0.27
360624CD00020000	BENEDETTI, PAUL A	GC	1.02
360519DB00010000	BI MART CORP #610	GC	2.77
360519CA00060100	BI-MOR STATIONS INC	GC	0.51
360519DA00350100	BLUE FROG PROPRTIE	GC	0.40
360519AC00150000	BOEHM, DARYL R &	GC	1.25
360519AC00190100	BOEHM, DARYL R &	GC	0.30
360517BC01650000	BOLINT FAMILY TRUST	CBD	0.11
360517D000070000	BOYER, ORIE C &	GC	0.28
360516CC00020100	BP WEST COAST PROCU	GC	1.07
360519AA00080000	BRADLEY, GENE R &	GC	0.36
360519AA00050000	BRADLEY, GENE R &	GC	0.17
360519AA00090000	BRADLEY, GENE R &	GC	0.15
360519AA00100000	BRADLEY, GENE R &	GC	0.23
360519DC00070000	BRAINWASH LLC	GC	0.39
360519DC00060100	BRAINWASH LLC	GC	0.30
360519DC00050000	BRAINWASH LLC	GC	0.72

Grants Pass Commercial Parking- Removed from Inventory

Prepared by Craig Stone and Associates using Josephine County Tax Assessor's Data and Josephine County Aerial Photos from County GIS

Map and Tax Lot	Name of Owner	Zoning	Acres
360519CC00060600	BRANSFIELD, ROBERT	GC	1.98
360519CA00210100	BRISENO, ROBERT J &	GC	0.62
360517CB00220300	BROER CO	GC	0.55
360624DC00010000	BROOKHURST PUD LLC	GC	1.51
360519AD00260000	BROWN, JEROME D &	GC	0.14
360519AD00230000	BROWN, JEROME D &	GC	0.15
360518AD00690000	BROWNSON, ERNEST (L	GC	0.12
360508CC01150000	BUCKLEY, ROBNETTE	GC	0.16
360508BC00270000	BYRD, RICHARD E &	GC	0.54
360520DD00140000	CADLE, THOMAS	GC	0.43
360520DD00140100	CADLE, THOMAS	GC	0.19
360508CA00090000	CAR LIT LLC	GC	1.00
360508CA00100000	CAR LIT LLC	GC	0.64
360508CA00110000	CAR LIT LLC	GC	2.45
360519DB00020000	CARTER, BUDDY JOSEP	GC	1.06
360624DC00060000	CEDARWOOD SALOON IN	GC	0.18
360624DC00060100	CEDARWOOD SALOON IN	GC	0.29
360520DD00130000	CHAMBERS, GARY J &	GC	0.63
360519CB00120000	CHAMBERS, GARY J &	GC	0.22
360519CB00110000	CHAMBERS, GARY J &	GC	0.10
360517BB00210000	CHANKIN, JOSEPH G &	GC	0.13
360520CB00170000	CLARK FAMILY TRUST,	GC	0.27
360521CC00150000	CLARK TRUST, JAMES	GC	0.83
360508BA00040300	COLEMAN PROPERTIES	GC	0.57
360508BA00040100	COLEMAN PROPERTIES	GC	0.51
360508BA00040500	COLEMAN PROPERTIES	GC	0.53
360519DC00240100	COL-JO CORP	GC	0.40
360517BC01120000	COLLINS, MICHAEL A	CBD	0.12
360517BC01130100	COLLINS, MICHAEL A	CBD	0.12
360517DA00110100	COLLINS, WANDA M TR	GC	0.20
360517DA00110000	COLLINS, WANDA M TR	GC	0.72
360517AC00970100	COLVIN OIL CO &	GC	0.44
360508CC01130000	COLVIN OIL COMPANY	GC	0.46
360519CA00080000	COLVIN, MERVIN W &	GC	0.93
360508CB00090000	COMMUNITY BANK OF G	GC	0.23
360508BA00140000	CONDRAY REV LIV TRU	GC	3.45
360508BA00120100	CONDRAY REV LIV TRU	GC	0.35
360517CC00550000	COURIER PUBLISHING	CBD	0.25
360517CC00580000	COURIER PUBLISHING	CBD	0.13
360517CC00600000	COURIER PUBLISHING	CBD	0.13
360517CC00590000	COURIER PUBLISHING	CBD	0.12
360517CC00610000	COURIER PUBLISHING	CBD	0.13
360517CC00620000	COURIER PUBLISHING	CBD	0.13
360517CC00630000	COURIER PUBLISHING	CBD	0.13
360517CC00670000	COURIER PUBLISHING	GC	0.25
360517CC00660000	COURIER PUBLISHING	GC	0.13
360517CC00710000	COURIER PUBLISHING	GC	0.23

Grants Pass Commercial Parking- Removed from Inventory

Prepared by Craig Stone and Associates using Josephine County Tax Assessor's Data and Josephine County Aerial Photos from County GIS

Map and Tax Lot	Name of Owner	Zoning	Acres
360517BC00420000	CRATER TITLE INSURA	GC	0.12
360520CA00380200	CRHA LIVING TRUST	GC	0.10
360520DB00160000	CROUCHER, KEVIN &	GC	0.90
360517BA00340000	CUMMINGS REV TRUST	GC	0.15
360508CA00530000	DAVIS, WILLIAM L JR	GC	0.16
360520CB00320000	DEAN, STEVEN J &	GC	0.23
360517BC00350000	DECOURCEY TRUST, DA	GC	0.12
360520DA00320000	DILLINGHAM, JOHN AL	GC	0.20
360520DA00320200	DILLINGHAM, JOHN AL	GC	0.61
360520DA00320100	DILLINGHAM, JOHN AL	GC	0.13
360624DD00110200	DOCTORS COURT II LL	GC	0.64
360517D000080200	EAM ADVERTISING AGE	GC	0.35
360517D000080000	EAM ADVERTISING AGE	GC	1.06
360517BC00970000	EHRlich, JOHN A &	CBD	0.12
360505CD00030100	EQUILON ENTERPRISES	GC	0.79
360519CD00180000	ERMSHAR FAMILY LLC	GC	0.73
360624DC00100000	FAHEY REALTY LLC	GC	5.43
360508CA00580000	FEDOSKY, DAVID V &	GC	0.19
360508CA00120000	FERGUSON, KENNETH R	GC	0.30
360517BC00890000	FIRST BAPTIST CHURC	CBD	0.12
360517BC00900000	FIRST BAPTIST CHURC	CBD	0.14
360518DD00630000	FIRST STATES INVEST	GC	0.24
360508CD00320100	FLEISCHMAN, RONALD	GC	0.17
360517BC00370000	FORD, THOMAS P	GC	0.13
360521CD00140000	FORTUNA, VINCENT C	GC	0.36
360521CC00140000	FOSTER FAMILY TRUST	GC	0.40
360517BC01550000	FOSTER, ROBERT & DO	CBD	0.12
360517CB00900000	FRALICH, LINDA D &	GC	0.23
360518DA00010100	FRAN MAR COMPANY	CBD	2.71
360520DA00180000	FRANCO, RUDOLPH &	GC	0.15
360519DB00280200	FRANCO, RUDOLPH R &	GC	0.13
360520CA00360000	FRANCO, RUDOLPH R &	GC	0.21
360518DA00910000	FRATERNAL ORDER OF	CBD	0.06
360518DA00920000	FRATERNAL ORDER OF	CBD	0.06
360520CA00200000	FRUITDALE GRANGE	GC	0.65
360519CD00060200	FUTUREQUEST COMPANY	GC	0.37
360517DD00030000	G P VENTURES LLC	GC	1.34
360518DD00280000	GATES, JOHN GIFFIN	GC	0.14
360518DD00290000	GATES, JOHN GIFFIN	GC	0.21
360508CD00110000	GETTY FAMILY TRUST	GC	0.23
360517CB00190000	GILL, CHARLES ARTHU	GC	0.07
360508CA00060100	GIORGI 2000 REV TRU	GC	0.60
360517BB00200000	GOSPEL RESCUE MISSI	GC	0.06
360518AD01250000	GRANGE CO-OP SUPPLY	GC	0.55
360517BC00480000	GRANTS PASS BOARD O	GC	0.11
360508BC00250400	GRANTS PASS COMMUNI	GC	0.24
360519DA00060000	GRANTS PASS IRRIGAT	GC	0.65

Grants Pass Commercial Parking- Removed from Inventory

Prepared by Craig Stone and Associates using Josephine County Tax Assessor's Data and Josephine County Aerial Photos from County GIS

Map and Tax Lot	Name of Owner	Zoning	Acres
360518DD00240000	GRANTS PASS LODGE #	GC	0.28
360517BB00260000	GRANTS PASS SURGICA	GC	0.50
360519DB00380000	GREEN LEAF INDUSTRI	GC	0.17
360519DB00390000	GREEN LEAF INDUSTRI	GC	0.56
360518AD01020000	GROVES FAMILY TRUST	GC	0.12
360517BB00120000	H2 HOLDINGS LLC	GC	0.26
360517BC00800000	H2 HOLDINGS LLC	CBD	0.23
360519AA00150000	HAMLYN FAMILY LLC	GC	0.21
360519AA00170000	HAMLYN FAMILY LLC	GC	1.09
360519AA00190000	HAMLYN FAMILY LLC	GC	0.43
360508CA00350000	HANLIN, STEVEN D &	GC	0.21
360624DC00080000	HARDGRAVES, JAY P &	GC	0.73
360521CC00200100	HARRIS, DONNA JENE	GC	0.35
360519CB00130000	HARRIS, RANDY &	GC	0.38
360517D000040000	HAWKINS, ANNE MARIE	GC	0.69
360508CB00010000	HAWKINS, BRIAN J	GC	0.53
360519DB00280000	HENDERSON, ROBERT A	GC	0.73
360519DB00270000	HENDERSON, ROBERT A	GC	0.26
360519DC00140100	HERNDON FAMILY LAND	GC	0.46
360520CB00160000	HOGAN, ERIC	GC	0.13
360520CA00050000	HOME GAS CO	GC	1.14
360508CA00510000	HOWELL, FAYE	GC	0.16
360508CD00520000	HUDDLESTON FAMILY L	GC	0.31
360508CD00530000	HUDDLESTON FAMILY L	GC	0.29
360518DA00660000	J TOMPKINS INC	CBD	0.24
360518DA00650000	J TOMPKINS INC	CBD	0.13
360519CA00050000	JACKSON LIV TRUST,	GC	0.80
360519CA00060000	JACKSON LIV TRUST,	GC	0.66
360517CA00330000	JACOBSON REV LIV TR	GC	0.66
360517BC01000000	JACOBY PROPERTIES L	GC	0.23
360519CA00070000	JD'S PROPERTIES LLC	GC	0.94
360521CC00020000	JESINGHAUS, JAMES L	GC	1.25
360519AA00380000	JOHNSON, CARL	GC	0.50
360519AA00390000	JOHNSON, CARL	GC	0.25
360519AA00420000	JOHNSON, CARL	GC	0.46
360519AA00410000	JOHNSON, CARL	GC	0.25
360518DA00400000	JOHNSON, DIRK H	CBD	0.12
360520DB00350100	JOHNSON, MICHAEL R	GC	0.35
360624DA00130000	JOSEPHINE COUNTY	GC	1.20
360519CB00100000	JOSEPHINE COUNTY	GC	0.83
360520CB00300000	JOSEPHINE COUNTY	GC	0.32
360518DA01360000	JOSEPHINE COUNTY HI	GC	0.23
360624DD00030000	JOSEPHINE COUNTY HU	GC	0.50
360517BC01420000	JUPITER CORPORATION	GC	0.23
360624CD00070000	KANEHL, DIETER W	GC	0.68
360519AA00140000	KAUFMAN TRUST, GERA	GC	0.15
360520DA00240000	KLOB LOVING TRUST	GC	0.48

Grants Pass Commercial Parking- Removed from Inventory

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Map and Tax Lot	Name of Owner	Zoning	Acres
360508CC00030100	KRUSE LOVING TRUST	GC	0.15
360517CB00830000	LAMONTAGNE LIV TRUS	CBD	0.11
360517CB00820000	LAMONTAGNE LIV TRUS	CBD	0.12
360624CD00010000	LANGLEY, DONNA C TR	GC	1.79
360518AD01010000	LANSING, MARK A	GC	0.12
360521CC00220000	LEWIS, BETTY JANE L	GC	0.49
360518DA00570000	LIN, SHOU-MIN &	GC	0.11
360520CA00380300	LINGAFELTER, PATRIC	GC	0.44
360521CC00130000	LITWILLER, NAOMI L	GC	0.41
360518AD01030000	LONGHURST, GORDON &	GC	0.12
360520DD00010100	LUKER, RICHY &	GC	0.54
360508CD00110100	MAIN BRANCH BUILDIN	GC	0.13
360508CD00620000	MANZANITA MEDICAL P	GC	0.44
360517CB00860000	MARTIN, RONALD H &	CBD	0.12
360517CB00870000	MARTIN, RONALD H &	CBD	0.12
360521CC00450000	MATTISON, DONNA J &	GC	0.38
360521CC00010000	MAUBACH REV LIV TRU	GC	0.29
360508CD00450000	MAXEY, JOE G &	GC	0.23
360508CD00460000	MAXEY, JOE G &	GC	0.24
360508CD00470000	MAXEY, JOE G &	GC	0.11
360519DA00020000	MCCARTER, JAMES W	GC	0.26
360518DA00130000	MCCOURTNEY, T JUNE	CBD	0.23
360520DB00150000	MCGINNIS, JOHN &	GC	1.84
360519AA00120000	MCGRATH, ANTONY RAM	GC	0.08
360519AD00050100	MCKINNEY PARK LTD	GC	0.77
360519AD00060000	MCKINNEY PARK, LTD	GC	0.24
360508CD00790000	MEHRABIAN, ALBERT &	GC	0.19
360519DC00060000	MERTZ, DENNIS J &	GC	0.12
360519DC00050100	MERTZ, DENNIS J &	GC	0.15
360517CA00400000	MILLER FAMILY TRUST	GC	0.75
360517CA00390000	MILLER FAMILY TRUST	GC	0.25
360519AD00200000	MILLS FAMILY TRUST	GC	0.26
360519AD00210000	MILLS FAMILY TRUST	GC	0.54
360508CA00150000	MONNOT, FRANK D &	GC	0.30
360518DA01350000	MOORE, NEIL TRUST	GC	0.12
360518DA01340000	MOORE, NEILA	GC	0.12
360624DC00040000	MOREY, EDWARD P	GC	2.25
360519CC00050000	MORGAN, JAMES P & B	GC	0.24
360519CC00040100	MORGAN, JAMES P & B	GC	0.71
360518DD00370000	MORRISON FAMILY PRO	GC	0.23
360517BC01400000	MORRISON TRUST, C A	GC	0.11
360516CD00020000	MORRISON TRUST, C A	GC	2.03
360516CA00200000	MORRISON TRUST, MIR	GC	2.59
360519CA00130100	MORRISON TRUST, MIR	GC	0.56
360519CA00100000	MORRISON TRUST, MIR	GC	0.41
360519CA00110000	MORRISON TRUST, MIR	GC	0.86
360508BD00100000	MORRISON, C A TRUST	GC	0.41

Grants Pass Commercial Parking- Removed from Inventory

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Map and Tax Lot	Name of Owner	Zoning	Acres
360508BD00110100	MORRISON, C A TRUST	GC	1.48
360508BD00090100	MORRISON, C A TRUST	GC	0.29
360517BC00830000	MORRISON, C A TRUST	CBD	0.23
360518DD00390000	MORRISON, GARY & MI	GC	0.12
360518AD01040000	MUMFORD, ROBERT L &	GC	0.10
360520DB00130300	NAUMES EQUIPMENT &	GC	0.86
360519DC00080200	NEWKIRK JLE WAY LP	GC	3.14
360517BC00190000	NEWMAN UNITED METHO	GC	0.23
360519AA00220000	NOW INVESTMENT INC	GC	0.38
360519AA00240000	NOW INVESTMENT INC	GC	0.61
360624CA00150000	NUNN, DENNIS &	GC	0.51
360624DB00220000	NUNN, RONALD C &	GC	0.96
360518DA00380000	ODEN, WILLIAM RUSSE	CBD	0.17
360624CD00060000	OREGON CREWE CUTTER	GC	0.69
360624CD00120000	OREGON PROPERTY HOL	GC	0.66
360508BA00110200	ORTEGA, LINDA M	GC	0.32
360518DD00710000	OWEN, WAYNE W &	GC	0.18
360519DC00010000	PAPAAUI RANCH PART	GC	0.36
360519DC00030100	PAPAAUI RANCH PART	GC	0.54
360519DA00110000	PARKER, THOMAS S &	GC	0.38
360519DA00130000	PARKER, THOMAS S &	GC	0.29
360519DA00140000	PARKER, THOMAS S &	GC	0.08
360517CB00160100	PARKWAY PROFESSIONA	GC	0.11
360517CB00170000	PARKWAY PROFESSIONA	GC	0.09
360517CB00180000	PARKWAY PROFESSIONA	GC	0.08
360508CD00390000	PATEL, BHARAT B &	GC	0.59
360518DD00910000	PATMGT 761GP LLC	GC	0.24
360518DD00920100	PATMGT 768GP, LLC	GC	0.09
360518DD00980000	PATMGT 901GP LLC	GC	0.17
360520DD00010400	PATTON, HOYT D JR	GC	0.42
360517BC01060000	PAVTAK PARTNERS	CBD	0.11
360519DC00080000	PAY LESS DRUG STORE	GC	4.33
360517BA00270000	PAYNE, RONALD G & D	GC	0.14
360520CA00460000	PENTECOSTAL CHURCH	GC	0.40
360517BC01080000	PIERCE, KENNETH W J	CBD	0.18
360517CB00220200	PIKE, LEONARD F CRE	CBD	0.89
360508BD00190000	POOLE, WILLIAM H &	GC	0.17
360519DA00360000	PROW, DAVID & MARIL	GC	0.27
360624DD00040000	QSR PROPERTIES LLC	GC	1.16
360517CB00360000	QUICK, JOANNE K	GC	0.17
360519DA00160000	QUICKER, ALLEN JOHN	GC	0.49
360517BC00090000	R W HAYS PROPERTIES	GC	0.29
360508BA00140100	RACHOR, JOHN V & SU	GC	2.25
360518BD00870000	RANDALL, NEIL B &	NC	0.29
360624CD00010100	REDWOOD BUSINESS PA	GC	0.31
360519DB00030000	REEDY LIVING TRUST,	GC	0.52
360517CB00060000	REEDY, CHRISTINE &	GC	0.15

Grants Pass Commercial Parking- Removed from Inventory

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Map and Tax Lot	Name of Owner	Zoning	Acres
360517CA00250000	REEDY, CHRISTINE E	GC	0.37
360520CB00640000	REESE, GLEN	GC	0.13
360520CB00650000	REESE, GLEN	GC	0.15
360519CA00200000	REINHART, MICHAEL C	GC	0.40
360520DA00340000	RICHARDS, IRMA &	GC	0.47
360517BA00220000	RIORDAN, JOHN J	GC	0.12
360519CA00120100	RISTAU, P D & DELYO	GC	1.52
360519CD00020000	ROBERTS JOINT TRUST	GC	0.69
360518DA00680000	ROBERTS JR TRUST, A	CBD	0.31
360517BC01300000	ROE, ROSS N &	CBD	0.12
360517BC01310000	ROE, ROSS N &	CBD	0.11
360517BC01480000	ROE, ROSS N &	GC,CBD	1.52
360517BC01380000	ROE, ROSS N &	GC	0.23
360517BC01290000	ROTUNNO, PETER J TR	CBD	0.12
360518DD00720000	RUBBER TREE INC	GC	0.36
360519DC00220000	RV JONES LLC	GC	1.91
360519DC00180000	RVI INC	GC	0.58
360517CB01200000	SAFEWAY, INC	GC	1.08
360519DA00370000	SAITO, DEL	GC	0.51
360517CA00350400	SAMMIS, SHIRLEY A	GC	0.72
360517BC01460000	SANFORD, MALLORY	GC	0.12
360517CA00170000	SAUER FAMILY TRUST,	GC	0.42
360519AA00070000	SCHWEIN FAMILY TRUS	GC	0.28
360518DB00020000	SCOTT, NORMAN E &	GC	0.19
360517CB00370000	SHIRLEY, TIMOTHY W	GC	0.17
360517BC01180000	SHREWSBURY PROPERTI	CBD	0.10
360508BD00070200	SIGEL FAMILY LLC	GC	0.58
360508BD00200100	SIXTH AND MIDLAND P	GC	0.55
360520DB00420000	SLAMA, KURT &	GC	0.26
360624DB00130000	SMITH, CARLIE W &	GC	0.33
360624DB00120000	SMITH, CARLIE W &	GC	0.72
360521CC00080000	SMITH, MAYNARD E &	GC	0.86
360521CC00070000	SMITH, MAYNARD E &	GC	0.20
360508CA00550000	SMITH, RALPH D & MA	GC	0.21
360508CA00560000	SMITH, TED &	GC	0.20
360508CA00520000	SOFCU COMMUNITY CRE	GC	0.16
360508CA00490000	SOFCU COMMUNITY CRE	GC	0.16
360517BB00130000	SPEARS FAMILY TRUST	GC	0.17
360517BB00050000	SPEARS, ALVIN K	GC	0.21
360517BB00170000	SPEARS, FAY C & ALV	GC	0.17
360517BB00160000	SPEARS, FAY C & ALV	GC	0.17
360517BB00020000	SPEARS, FAY C & ALV	GC	0.17
360517BB00150000	SPEARS, FAY C & ALV	GC	0.17
360517BB00030000	SPEARS, FAY C & ALV	GC	0.17
360517BB00040000	SPEARS, FAY C & ALV	GC	0.25
360508BB00100000	STEIN ENTERPRISES I	GC	1.33
360508BB00100000	STEIN ENTERPRISES I	GC	0.46

Grants Pass Commercial Parking- Removed from Inventory

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Map and Tax Lot	Name of Owner	Zoning	Acres
360508BB00100300	STEIN ENTERPRISES I	GC	0.95
360508BB00100300	STEIN ENTERPRISES I	GC	0.51
360518DD00620000	STEIN LIV TRUST	GC	0.39
360517CA00280000	STEPHENSON, THEODOR	GC	0.93
360518DD00610000	STEVENSON, GARY ORV	GC	0.23
360517BB00220000	STINEBAUGH, S J JR	GC	0.17
360517BB00220100	STINEBAUGH, S J JR	GC	0.33
360518DA00970040	STRINGER, JOYCE J &	CBD	0.23
360624CC00120000	STUTZMAN JOINT TRUS	GC	4.70
360530BA00100000	SVED, SAMUEL &	GC	0.14
360519CD00020200	SWANSON, JERRY S &	GC	0.83
360516CD00030400	TACO BELL CORP	GC	0.85
360519CD00029100	TEHAMA TIRE SERVICE	GC	0.12
360519CD00010000	TEHAMA TIRE SERVICE	GC	1.09
360508CA00390000	THOMAS, LOIS IONE	GC	0.15
360518DD00030000	THOMASON FAMILY TRU	GC	0.25
360518DD00040000	THOMASON FAMILY TRU	GC	0.51
360518DD00050000	THOMASON FAMILY TRU	GC	0.25
360519CC00060300	THREE RIVERS COMMUN	GC	1.36
360519CC00061100	THREE RIVERS COMMUN	GC	1.28
360520CA00400000	TILLERY REV LIV TRU	GC	1.09
360517BA00400000	TOMPKINS, AMY K TRU	GC	0.23
360517BA00390000	TOMPKINS, AMY K TRU	GC	0.21
360519DC00120000	UMPQUA HOLDING CORP	GC	0.50
360520CA00370000	VAN BRINK, LAURA	GC	0.12
360508CC01180000	VENUTI, TONY &	GC	0.17
360517BA00520000	VETSCH, DOUGLAS M &	GC	0.29
360517BA00550000	VON COELLN TRUST DT	GC	0.25
360520CA00470000	WADE'S RENTAL SALES	GC	0.59
360518DD00970000	WALDON FAMILY TRUST	GC	0.13
360521CD00380000	WALKER, LEE &	GC	0.92
360521CD00370000	WALKER, LEE &	GC	0.79
360521CC00440000	WALLACE LIVING TRUS	GC	0.30
360516CD00030100	WAL-MART REAL ESTAT	GC	18.43
360508CA00060200	WASHINGTON MUTUAL B	GC	0.29
360508CA00060000	WASHINGTON MUTUAL B	GC	0.53
360518DA00390100	WEBB, DARRELL R & J	CBD	0.23
360519DB00400000	WEINBERG REV TRUST,	GC	5.48
360517BC01580000	WELLS FARGO BANK, N	CBD	0.30
360517BC01150100	WESTERGARD, GORDON	CBD	0.11
360517BC01150000	WESTERGARD, GORDON	CBD	0.11
360517BC01140000	WESTERGARD, GORDON	CBD	0.24
360519DB00240000	WESTON, GERALD R &	GC	2.17
360519CD00099000	WFS MATERIALS INC	GC	0.13
360519CD00070000	WFS MATERIALS INC	GC	0.28
360517CB00140000	WHALEY, LARRY A &	GC	0.14
360517CB00150000	WHALEY, LARRY A &	GC	0.09

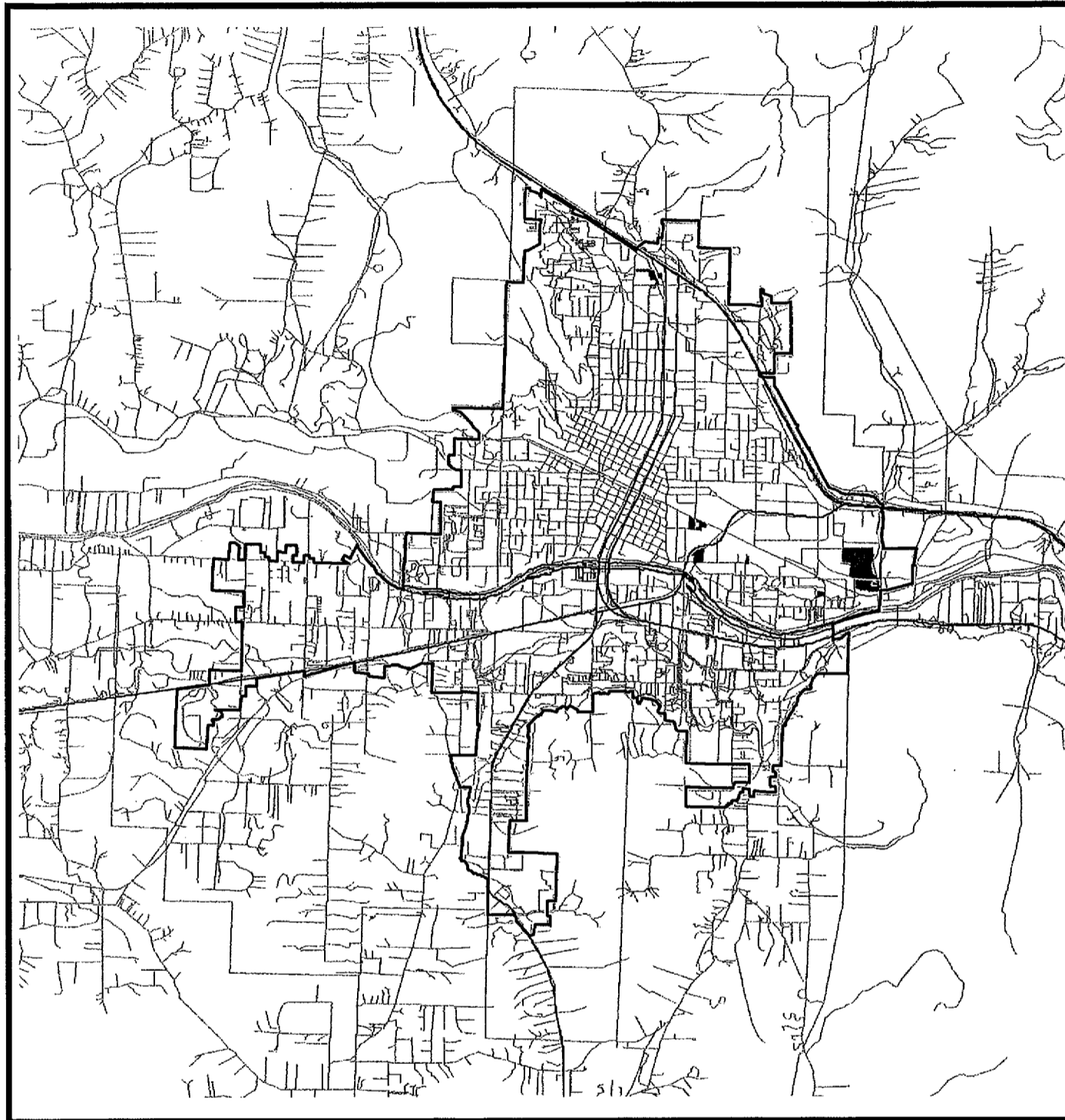
Grants Pass Commercial Parking- Removed from Inventory



Prepared by Craig Stone and Associates using Josephine County Tax Assessor's Data and Josephine County Aerial Photos from County GIS

Map and Tax Lot	Name of Owner	Zoning	Acres
360516CB00270000	WHALEY, LARRY A &	GC	0.47
360518DD00460000	WHEELER, CLIFFORD T	GC	0.66
360520DD00099000	WHETSTONE HOLDINGS	GC	0.45
360505CD00030200	WILD RIVER INN INC	GC	3.62
360519CC00040300	WILLIAMS TRUST, MAC	GC	0.52
360519CC00040400	WILLIAMS TRUST, MAC	GC	0.50
360519CD00030000	WINETEER, EDWIN L &	GC	0.78
360508CA00480000	WOOD, KENNETH M & M	GC	0.16
360624DC00050300	WOODRUFF, DALE R &	GC	0.41
360519CC00060000	WOODRUFF, DANIEL L	GC	3.51
360517BB00350000	ZHU, YUAN C &	GC	0.16
360517BB00340000	ZHU, YUAN C &	GC	0.25

Appendix F

Industrial Lands Part of Going Concerns



-  Industrial Non-Building Use
-  Grants Pass UGB

Industrial Property with Non-Building Uses

Source: Josephine County Assessor

September 30, 2006

Craig Stone and Associates



2000 0 2000 4000 6000 8000 Feet



Industrial Properties with non-Building Uses in Grants

Prepared by Craig Stone and Associates based on Josephine County Tax Assessor's Data and J

Map and Tax Lot	Owner Name	Zoning
360505CC00070500	BEACHAM, FRANK A &	BP
360505CC00080000	CHIERICHETTI, PAUL	BP
360505CC00100000	COLEMAN PROPERTIES	BP
360505CC00050000	COLEMAN, JOSEPH E &	BP
360517CD00010000	DAVISON'S READYMIX	BP
360517D000120000	HVALL, RANDY E	I
360520AA00020000	INDIAN CREEK MANAGE	BP
360505CC00060000	LEONARD, LONNIE	BP
360521AC00070000	MARTIN, WILLIAM M J	BP
360520AB00020000	PETERSON, GARY L &	I
360521A000030000	SPALDING & SON INC	I
360521A000030000	SPALDING & SON INC	I
360517D000110000	STEVENSON, GARY ORV	I

Appendix G
National, Regional and Statewide Trends

Oregon Economic and Revenue Forecast

September 2006

Volume XXVI, No. 3



Theodore R. Kulongoski
Governor

State of Oregon
Department of Administrative Services
Lindsay Ball, Director

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SUBSCRIPTIONS

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September 2006

Department of Administrative Services

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FOREWORD

This document contains the Oregon economic and revenue forecasts. The Oregon economic forecast is published to provide information to planners and policy makers in state agencies and private organizations for use in their decision making processes. The Oregon revenue forecast is published to open the revenue forecasting process to public review. It is the basis for much of the budgeting in state government.

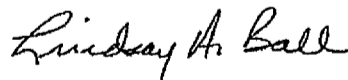
The report is issued four times a year; in March, June, September, and December. During legislative sessions, the June forecast is released on May 15.

The economic model assumptions and results are reviewed by the Department of Administrative Services Economic Advisory Committee and by the Governor's Council of Economic Advisors. The Department of Administrative Services Economic Advisory Committee consists of 15 economists employed by state agencies, while the Governor's Council of Economic Advisors is a group of 12 economists from academia, finance, utilities, and industry.

Members of the Economic Advisory Committee and the Governor's Council of Economic Advisors provide a two-way flow of information. The Department of Administrative Services makes preliminary forecasts and receives feedback on the reasonableness of such forecasts and assumptions employed. After the discussion of the preliminary forecast, the Department of Administrative Services makes a final forecast using the suggestions and comments made by the two reviewing committees.

The results from the economic model are in turn used to provide a preliminary forecast for state tax revenues. The preliminary results are reviewed by the Council of Revenue Forecast Advisors. The Council of Revenue Forecast Advisors consists of 15 specialists with backgrounds in accounting, financial planning, and economics. Members bring specific specialties in tax issues and represent private practices, accounting firms, corporations, government (Oregon Department of Revenue and Legislative Revenue Office), and the Governor's Council of Economic Advisors. After discussion of the preliminary revenue forecast, the Department of Administrative Services makes a final revenue forecast using the suggestions and comments made by the reviewing committee.

Readers who have questions or wish to submit suggestions may contact the Office of Economic Analysis 503-378-3405.



Lindsay Ball, Director
Department of Administrative Service

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EXECUTIVE SUMMARY

September 2006

Oregon Economic Forecast

The second quarter initial estimate of job growth was an increase of 1.4 percent at an annual rate. This is the twelfth consecutive quarterly growth in jobs but breaks a string of eight quarters of growth above 2.0 percent. On a year-over-year (Y/Y) basis, jobs increased in the second quarter by 3.6 percent. Y/Y growth has been above 2.0 percent since the second quarter of 2004.

The second quarter of 2006 marks the third year of job growth. The last three months (April to June) show a markedly slow pace for job creation. The Oregon Employment Department reports that recent job growth is running a little better than one percent compared to the 3.5 percent annual growth rate of the prior two-year period. The outlook for the national economy is for positive growth but at a slower rate. Given the prospects for a slowing of the housing market and the negative impacts from high energy prices, the prognosis is for slower growth in the Oregon economy. As the economy slows, it is more vulnerable to other risks, be they geopolitical or hurricane season.

The Office of Economic Analysis (OEA) forecasts employment to rise by 3.2 percent for 2006, the strongest yearly growth since 1997. This annual job growth is pushed up by the strong first quarter growth of 6.3 percent. The job growths of the remaining two quarters of 2006 are projected to average 1.0 percent. Job growth in 2007 is projected to be 1.3 percent, reflecting the slowing growth projected for the national economy. The economy continues to expand with 1.6 percent job growth in 2008.

Manufacturing will increase by 2.9 percent in 2006 and then reflect mild declines of 0.5 percent in 2007 and 0.3 percent in 2008. Job levels will still be below the average job levels of 2000.

Wood product manufacturing is projected to be down 0.5 percent in 2006 and then decline by 1.5 percent in 2007 and 2008.

The sector that contains semiconductors, computer and electronic products, will show gains of 3.0 percent for 2006. The job outlook is more uncertain with declines of 0.8 percent in 2007 and 0.1 percent in 2008. The outer years are projected to keep this sector in a no growth pattern.

Transportation equipment will increase by 6.2 percent in 2006. Job gains will give way to a slight decline in 2007 with a decrease of 0.5 percent. Employment will slightly decline with a loss of 0.8 percent in 2008.

Private non-manufacturing jobs will increase by 4.0 percent in 2006 and 1.7 percent in 2007 and 2.0 percent in 2008.

Construction will increase jobs at a strong 9.7 percent in 2006. Job growth will decline with a 1.0 percent drop in 2007 before a milder job growth of 0.8 percent in 2008.

Trade job growth will have similar growth this year compared to 2005. Retail trade job growth will be stronger in 2006 at 3.5 percent and grow 1.4 percent in 2007 and 1.9 percent in 2008. Wholesale trade will be positive in 2006 with an annual job growth of 2.5 percent followed by job gains of 1.0 percent in 2007 and 0.8 percent in 2008.

Professional and business services and health services will see some of the strongest growth. Professional and business services will grow 4.9 percent in 2006 followed by 3.5 percent growth in 2007 and 3.8 percent in 2008. Health services will increase 3.6 percent, 2.0 percent, and 2.6 percent on average for the same years.

Leisure and hospitality, which includes accommodations and food services, is expected to grow by 3.4 percent in 2006, and 1.8 percent in 2007, and 2.0 percent in 2008.

Government employment is expected to increase by 0.2 percent in 2006 followed by growth of 1.1 percent in 2007 and 2008. State and local government jobs will continue mild growth as tax revenues have improved with the stronger economy.

Population growth is expected to be higher than the U.S. average, but slower than the growth experienced in the mid-1990s. Growth will be slightly higher than during the recession over the next three years, with increases of 1.4 percent for each year.

Forecast Risks

The housing market in Oregon shows all signs of slowing with building inventories, declines in sales of new and existing homes, and lower building permits. The last item to join this group is price. So far, house price appreciation has continued but at a slightly slower pace. The expectation is for house prices to drift to single digit increases and decline in some markets.

Oil prices continue to be bounced around by geopolitical events, the most recent being the Israeli-Hezbollah conflict. Refineries in the Gulf region are almost completely back to capacity operation and have helped mute some of the oil price increases from translating to much higher prices at the gas pump. But hurricane season is rapidly coming up and the risk of a repeat of last year is still in our memories. (For a more thorough review of oil market risk to the economy, please see this section in the June 2006 Economic and Revenue Forecast publication – “Economic Impact from Oil Prices”.)

We will continue to monitor and recognize the potential disruptions of these two risks factors on the Oregon economy.

The major risks now facing the Oregon economy are:

- Geopolitical risks. Uncertainty still surrounds the transition in Iraq, tensions with North Korea, Iran, Israel and Lebanon, and heightened security risks all weigh heavily on businesses and consumers. Disruptions in travel, oil supplies, and consumer confidence could be severe. The drop in business activity could be deeper if this uncertainty persists or

if the transition out of war goes badly for the U.S. The winding down of military expenses will not greatly impact Oregon. There is also an upside risk that transition issues go more smoothly than anticipated and stability in the Mid East provide a stimulus to the economy that is stronger than forecast.

- Inflation and Federal Reserve Bank reactions. A growing economy with surging energy costs is a recipe for inflation. Faster inflation than forecasted may force the Federal Reserve to raise interest rates more quickly and to higher levels. This action could slow the U.S. economy and in turn slowdown the Oregon economy.
- Falling U.S. Dollar. As the dollar depreciates against other foreign currencies, U.S. exports are promoted. Oregon's manufacturing sector has a large dependency on international markets. If the U.S. dollar falls too quickly, this could harm Oregon's trading partners, weakening their economies and lowering their demand for Oregon products. For the moment, the dollar has crept up against other currencies and the revaluation of the Yuan may be too small to greatly assist Oregon exports. In the end, a controlled lowering of the U.S. dollar is most beneficial to the Oregon economy.
- A sharp and major stock market correction. This would slow consumer spending. Lower stock prices could also limit the ability of businesses to raise necessary capital in the equity markets.
- A possible collapse of the housing market. The extremely low interest rates have caused a boom in home refinancing. As this activity matures and interest rates begin to raise, the added boost to consumer spending may also slow. Any drop in home price appreciations coupled with a large drop in mortgage refinancing could slow down consumer spending. The Oregon housing market could be adversely impacted by a major housing correction in California. Continued gains in personal income will be needed to keep consumer spending from falling.
- Rising regional energy prices. More businesses may slow production and lay off workers. Natural gas prices have risen the past year but appear to be leveling off, at least for this year. Oil prices have crossed above \$70 per barrel with fears it could go higher. A Goldman Sachs report suggests the possibility of a 'super-spike', sending the price of oil over \$100 per barrel. A geopolitical incident could dramatically disrupt gasoline and natural gas prices, with the Goldman Sachs report a more probable outcome. Regionally, electricity generation has been helped by a deeper snow pack but is still subject to weather patterns and natural gas prices. As demand surpasses the available capacity of hydro generation, electric generation may move towards natural gas powered turbine engines. Higher electricity prices could result from being pegged to natural gas prices.
- PERS and possible state and local government budget shortfalls. The Oregon Supreme Court overturned two major reforms but upheld the Settlement Agreement. The Court did not rule out future Legislative reforms to PERS. Although the 2005-2007 biennium appears to need only small additional expenditures, state and local governments may need to increase taxes, reduce services, and/or increase bond financing in the future to cover potential unfunded

liabilities for PERS. If increases in unfunded liabilities leads to increased tax rates, this could lead to a substantial negative impact on Oregon's economy. To the extent that spending cutbacks hit education and public infrastructure, the state could suffer longer-term impacts.

- Initiatives, referendums, and referrals. The ballot box brings a number of unknowns that could have wide-sweeping impacts on the Oregon economy. The Oregon Supreme Court has upheld the land use Measure 37. This measure could bring dramatic changes to land use regulation. Claims that were on hold will start moving through the hearing process. At this time, it is uncertain as to the impacts from compensation or lifting of land use restrictions.
- The recovery for semiconductors, software, and communications could be much slower than anticipated. Continued outsourcing of manufacturing could slow growth in this region. Recent commitments to move research out of the country would be very harmful to Oregon's high technology sector.

The major upside opportunities now facing the Oregon economy are:

- Sharp reduction of oil prices. Oil prices are being pushed above market equilibriums by disruptions stemming from political turmoil to extreme weather. Once these factors settle down and supplies increase, oil prices could fall much further than currently anticipated.
- Recovering business and consumer confidence. The transition out of the war in Iraq could accelerate. Rising confidence can help boost spending and hiring. Spillover effects to the stock market would reinforce the economic recovery.
- Controlled growth of China and India. China and India may successfully manage their economies to be more stable and still strong. This should stabilize commodity price volatility while promoting Oregon exports.

The September 2006 forecast for the next few years is a balanced look at prospects for the future. It is our "base scenario" or most likely outcome of the future. Nevertheless the risk factors described above can push economic activity stronger or weaker. At this point, OEA deems that the risks are not balanced; they are tilted toward more downside than upside, at least in the near term. In other words, risks are biased toward a milder growth scenario compared to our baseline forecast. The risks, of course, could change going forward as conditions change and certain risk factors would have been resolved, becoming part of the baseline assumptions.

Demographic Forecast

The Census 2000 enumerated 3,421,399 persons in Oregon on April 1, 2000. This is an increase of 579,000 persons or 20.4 percent from the 1990 Census. Oregon's rate of growth between the two censuses was eleventh highest in the nation. In the past few years, however, the population growth rate was slow due to the struggling economy. Oregon's July 1, 2005 estimated population was 3.631 million, an increase of 1.36 percent over the 2004 population, up from the nearly 1.14 percent annual growth rate since 2000. This is a strong indicator that Oregon's

economy is picking up. Yet this annual growth rate is far from the well over 2 percent annual rate of growth a decade ago. The state's population is expected to reach 4.061 million in the year 2013, with an annual rate of growth around 1.4 percent.

During the 2005-2013 period, growth in all age groups will show the effects of the baby-boom generation, migration of the working age population and elderly retirees, and demographics impacted by the depression era birth cohort. After a period of slow growth in the past, the elderly population (65+) growth will pick up speed as the baby-boom generation start to enter this age group. The annual growth of the elderly population will reach 5 percent in 2012 when the boomers start to enter the retirement age. The youngest elderly (aged 65-74) will grow at an extremely fast pace due to the direct impact of baby-boom generation entering the retirement age. The elderly aged 75-84 will shrink in number until 2010 as this group will be dominated by the depression era birth cohort. The oldest elderly (85+) will continue to grow at a moderately high rate due to the combination of cohort change, continued positive net migration, and improving longevity.

As the baby-boom generation matures, once fast paced growth of population aged 45-64 will gradually taper to well below 1 percent rate by 2013. The young adult population, the 18-24 age group, will grow at an average of below 1 percent annually, considerably slower than the rate averaging 1.4 percent between 2000 and 2004. This will ease the pressure on public spending on college education. Children under the age of 5 will grow moderately at 0.6 to 1.4 percent rate. The K-12 population, the 5-17 age group, will show very slow growth which will translate into slow growth in school enrollments. The 25-44 age group population has shown a sign of reversing the trend after several years of decline due to exiting baby-boom cohort. This age group has seen a positive growth starting in the year 2003 and will exceed 1.4 percent annual growth by the year 2013.

Revenue Forecast

The forecast for General Fund revenues in the 2005-07 biennium equals \$12,607.4 million, an increase of \$199.0 million from the June 2006 forecast. Unlike the prior forecast's revision, the increase for this update is spread across the majority of revenue sources. Available resources of \$12,915.9 million exceed appropriations by \$1,272.0 million.

The forecast for General Fund revenues excluding corporate income tax, the basis for the "personal" kicker calculation, exceeds the Close of Session forecast for these revenue sources by 9.6 percent. If, when these revenues are tabulated following the end of the biennium, actual revenues exceed the COS forecast by 2.0 or more, all surplus revenues will be refunded to 2006 taxpayers per Oregon's kicker law. As of the September 2006 forecast, the value of the personal kicker is \$1,042.7 million.

Projected corporate income tax collections for the 2005-07 biennium equal \$738.0 million, an increase of \$39.6 million from the June 2006 forecast. The forecast exceeds the Close of 2005 Session forecast by \$238.0 million, which is well above the kicker threshold. The current forecast would result in a 61.3 percent tax credit for 2007 corporate taxpayers.

Structural General Fund revenues (excluding kicker refunds and credits) are projected to grow 8.3 percent to \$13,797.7 million for the 2007-09 biennium, an increase of \$99.2 million from the June forecast. Beyond the deceleration in general economic growth, the mild growth in revenues is primarily the product of two factors: growth in personal income taxes will slow as the drivers behind recent, rapid increases, namely the housing market and one-time capital gains realizations, fail to serve as primary growth factors in the next two years. In addition, corporate income taxes are expected to decline due to tax law changes and normal business cycle patterns. Excluding kicker refunds and credits totaling \$1,280.7 million, General Fund resources available for appropriation will equal \$13,789.0 million in 2007-09.

The long-term outlook is driven primarily by anticipated growth in personal income taxes. Project growth for other revenue sources is quite mild. General Fund revenues will reach \$15,369.9 million in 2009-11, a 22.8 percent increase that is exaggerated by impact of sizable kicker refunds in the prior biennium. For 2011-13, General Fund revenues increase 12.5 percent to \$17,296.4 million.

Projected lottery resources for the 2005-07 biennium will total \$1,068.3 million, an increase of \$39.7 million from the June forecast. Following each fiscal year, the Oregon State Lottery transfers administrative savings, the difference between actual and budgeted expenses, if any, to the Economic Development Fund. The transfer for fiscal year 2006 is \$26.7 million, accounting for the majority of the forecast revision. Excluding constitutionally dedicated and other legislatively-adopted allocations, the projected ending balance for the Economic Development Fund is \$47.2 million.

The extended outlook for lottery earnings reflects anticipated video lottery sales growth, as earnings from traditional games are expected to decline slightly. For the 2007-09 biennium, projected earnings and resources will equal \$1,185.3 million and \$1,236.5 million, respectively. In 2009-11, earnings will reach \$1,311.7 million while resources will total \$1,316.2 million. Finally, earnings equal \$1,456.3 million and resources equal \$1,462.3 million for the 2011-13 biennium.

I. ECONOMIC FORECAST

September 2006

This edition of the National Economic Review and Forecast contains excerpts from Nigel Gault, Global Insight, "U.S. Economy: Current Situation: Forecast Flash" July 2006. This publication summarizes Global Insight's baseline national forecast that OEA incorporates into the Oregon economic and revenue models. Text in [] is editorial comments written by OEA staff. In addition, Table N.1 provides a quick look at the annual rates. Table N.2 provides a look at the forecast change from the last forecast. Graph N.1 provides a graphic U.S. history and forecast. A full version of the National section can be found at our website.

www.oea.state.or.us/DAS/OEA/docs/economic/nationalfull.pdf

A. National Economic Review and Forecast

The Slowdown Is Here

The fourth-quarter slowdown in GDP growth proved to be a head-fake, as the economy came roaring back in the first quarter. But growth has slowed again in the second quarter, and this time we think it's for real. The housing market is cooling, and already-stretched consumers are facing high gasoline bills. With core inflation edging higher, the Federal Reserve is in no position to provide relief, and will have to push interest rates a bit higher still.

Growth Slowed in the Second Quarter. Signs of slower growth have become clearer. We have revised down our estimate of second-quarter growth to 2.3% (from 2.7% last month). Our consumer spending growth projection is unchanged at 2.0%, down from 5.1% in the first quarter. The increased cost of filling gasoline tanks has squeezed spending in other areas, particularly for lower-income consumers who have less room for maneuver. However, based on monthly construction data, we now expect a larger drag from residential investment than before—the first negative in more than four years. And monthly capital goods shipments data suggest that business equipment spending growth has slowed unexpectedly. For residential investment, the second-quarter decline foreshadows a more severe drag in the second half of the year. For business equipment spending, though, the fundamentals (especially cash flow) still look good, and we anticipate that the second half will see a pickup in growth.

Second Half Better than the Second Quarter. We do not expect GDP growth in the second half of the year to be as soft as in the second quarter, although we still see it running below trend, at a 2.8% average. While housing should continue to decline, we expect some improvement in consumer spending growth, especially if oil and gasoline prices stabilize and then retreat, as we assume. Strong business investment demand and export growth should support GDP growth, but we do not see them fully canceling out the housing drag. Will sub-par growth allow the Fed to stop hiking interest rates? All will depend on inflation.

Core Inflation Rising. Three bad core CPI figures in a row (0.3% in March, April, and May) fanned fears of inflation, and scotched any notion that the Fed could take a break from rate hikes

in June. Core consumption price (PCE) inflation now stands at 2.1% year-on-year, above the upper limit of the Fed's informal 1-2% tolerance band. This tolerance band is not a "hard" target zone, so the Fed can tolerate some slippage—as long as it is confident that inflation will fall back later. Unfortunately, even if monthly price increases ease back, unfavorable comparisons with a year ago are likely to take core PCE inflation up to 2.4% in the third quarter, even as growth slows. Despite the downside risks to economic growth, we think that the Fed will need to react, since it cannot afford to appear to be "behind the curve" on inflation.

Financial Markets Have Calmed Down. Although important risks remain, financial markets have calmed down in recent weeks. The Fed's statement of June 29, accompanying its rate hike to 5.25%, was interpreted by some as hinting that interest rates have peaked, or that at least a pause is in the offing. Since we see upside risks to inflation in the immediate future, concern that the Fed might be "behind the curve" could easily resurface and lead to renewed volatility in financial markets.

At Least One More Move from the Fed. FOMC members are clearly worried about the risk of over-tightening, and thus sending the housing market into a tailspin. But the June rate hike showed that the Fed is determined above all to keep a lid on inflationary expectations. We believe that the inflation threat will trump the growth slowdown, and expect the Fed to hike the federal funds rate by another 25 basis points (to 5.50%) on August 8. [The Fed left the federal funds rate unchanged at 5.25 percent] The risk for the remainder of 2006 is that the Fed might have to hike more than once. In 2007, with GDP growth running below trend and inflation edging lower, we see some modest rate reductions beginning in the second quarter.

Table N. 2

U.S. Forecast Change - Current (July 2006) vs. Last Forecast (April 2005)

	Quarterly				Annual									
	2006:2	2006:3	2006:4		2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
GDP (Bil of 2000 \$) Chain Weight	11,470	11,549	11,628		10,756	11,135	11,513	11,808	12,179	12,565	12,939	13,310	13,668	14,042
% Change From Last Forecast	(0.0)	0.0	0.1		0.0	0.0	0.1	0.1	0.1	(0.1)	(0.1)	(0.1)	(0.1)	(0.1)
Personal Income (Bil of \$)	10,737	10,875	11,011		9,713	10,238	10,801	11,403	12,068	12,773	13,489	14,212	14,934	15,681
% Change From Last Forecast	(0.5)	(0.6)	(0.7)		0.0	(0.1)	(0.6)	(0.4)	(0.1)	(0.1)	0.1	0.4	0.7	0.8
Nonagricultural Employment (Millions)	135.1	135.6	136.0		131.4	133.5	135.4	137.2	139.1	140.8	142.0	143.0	143.8	144.5
% Change From Last Forecast	(0.1)	(0.1)	(0.1)		(0.0)	0.0	(0.1)	(0.1)	0.0	0.0	0.0	0.0	0.0	(0.0)
Unemployment Rate	4.6	4.6	4.7		5.5	5.1	4.7	4.8	4.8	4.7	4.7	4.8	4.8	5.0
% Change From Last Forecast	(1.9)	(1.7)	(1.7)		0.0	0.0	(1.5)	(1.6)	(1.8)	(1.2)	(1.0)	(1.3)	(1.1)	(0.5)
Industrial Production Index (2002=100)	112.4	113.3	113.8		104.7	108.1	112.6	115.2	117.6	120.1	123.0	126.5	130.1	134.0
% Change From Last Forecast	0.3	0.3	0.2		0.0	(0.0)	0.2	(0.0)	(0.3)	(0.8)	(1.1)	(1.3)	(1.4)	(1.5)
Corporate Profits (Bil of \$)	1,751	1,724	1,737		1,059	1,438	1,730	1,740	1,766	1,789	1,822	1,882	1,963	2,081
% Change From Last Forecast	5.6	6.8	7.0		0.0	0.0	6.0	8.8	10.7	12.6	14.2	14.8	15.3	15.1
Money Supply (M2) (Bil of \$)	6,797	6,854	6,906		6,398	6,650	6,906	7,168	7,484	7,813	8,167	8,540	8,927	9,334
% Change From Last Forecast	(0.2)	0.1	0.3		0.0	0.0	0.3	1.0	0.9	0.9	1.0	1.2	1.3	1.4
Prime Rate	7.89	8.40	8.50		4.34	6.19	8.06	8.20	7.75	7.94	8.00	8.00	8.00	8.00
% Change From Last Forecast	0.1	1.8	3.0		0.0	(0.0)	1.2	2.8	0.0	0.0	0.0	(0.0)	(0.0)	(0.0)
Consumer Price Index (1982-84=1)	2,018	2,027	2,028		1,889	1,953	2,017	2,058	2,093	2,126	2,167	2,210	2,256	2,303
% Change From Last Forecast	0.8	1.1	0.7		(0.0)	(0.0)	0.7	1.2	1.0	0.9	1.0	1.1	1.2	1.3
Federal Budget (unified) (Bil of \$, Fed FY)	91.9	(78.2)	(96.5)		(400.7)	(319.7)	(266.5)	(287.4)	(328.9)	(285.8)	(242.9)	(205.3)	(172.4)	(189.5)
Current Account Balance (Bil of \$)	(882.0)	(915.1)	(902.6)		(665.3)	(791.5)	(883.6)	(893.6)	(873.3)	(850.3)	(857.6)	(864.2)	(844.8)	(819.3)
% Change From Last Forecast	(5.2)	(2.8)	(4.4)		(0.4)	(1.7)	(5.0)	(4.8)	(5.1)	(6.4)	(5.5)	(4.7)	(4.3)	(4.3)
Population (Millions)	299.3	300.0	300.6		294.2	296.9	299.6	302.3	304.9	307.6	310.3	312.9	315.6	318.3
% Change From Last Forecast	(0.0)	(0.0)	(0.0)		(0.0)	0.0	(0.0)	(0.0)	(0.0)	0.0	(0.0)	0.0	0.0	(0.0)

B. International Review and Outlook

Introduction

The U.S. economy has already seen a substantial slowdown in its growth rate. In its August 2006 forecast, Global Insight expects that the rest of the world economy will follow suit, with perhaps a short lag. It is generally expected that inflation will continue to drift upward over the next year. While global inflation rates have been slightly above the comfort levels perceived by the central banks, it is also believed that the inflation rate will not go on an upward spiral, partly thanks to quite stable inflation expectations across the world.

While the Fed stopped raising interest rates for now, both the European Central Bank and the Bank of England raised key interest rates by 25 basis points (0.25 percentage points) in early August. In July, the Bank of Japan ended its zero-interest-rate policy by raising rates 25 basis points. The global monetary tightening cycle will probably continue for a while as inflation remains a concern and the economy enjoys strong growth.

Global Insight believes that an expected further weakening of the U.S. dollar will create an additional headwind for many regions of the world, which have enjoyed strong export growth in the past few years. Although the global economy will experience a largely U.S.-led "mid-cycle correction" over the next year, the risks of a more serious downturn are still low, according to Global Insight.

In the first half of 2006, U.S. exports to the rest of the world increased 13.8 percent from a year ago to \$506.2 billion in current prices. During the same period, Oregon's export growth outpaced the nation, increasing 29.7 percent to reach \$7.4 billion.

Recent Developments and Outlook for Oregon Export Markets

The global economy continued to grow strongly in the first half of 2006. Global Insight expects it to cool off in the second half of 2006 and then land at near trend growth of 3 percent in the first half of 2007.

The U.S. economy has already decelerated from its very rapid growth rate in the first quarter. Cooling housing markets and restrained consumer spending contributed to this deceleration. The U.S. slowdown is expected to have ripple effects across the world. According to scenarios run with Global Insight's Global Scenario Model, the U.S. cyclical downturn alone will shave 0.4 to 0.5 percentage points off world growth. Global Insight lists other factors that will also constrain world growth, including higher energy prices, tightening monetary conditions in the Eurozone and Japan, and a falling U.S. dollar.

The Eurozone economy posted second-quarter growth of 0.9 percent, or 3.6 percent seasonally adjusted annual growth. It was the best performance in six years. Global Insight expects Eurozone growth to decelerate between this year and next, from 2.1 percent to 1.7 percent. Global Insight also forecasts that the Japanese economy will expand 2.6 percent this year, followed by 2.5 percent in 2007. Even though China's growth accelerated to 11.3 percent in the

Table I. 1

Projected Growth Rates of Real GDP (Percent)				
As of 07/12/2006	(Average)			
	2005	2006	2007	2008-11
United States	3.2	3.3	2.4	3.1
Canada	2.9	3.2	2.7	2.8
Japan	2.6	2.6	2.5	1.5
Eurozone	1.4	2.1	1.7	1.9
Mexico	3.0	3.8	3.7	3.5
South America	4.9	4.8	4.4	4.0
Asia except Japan	6.9	7.0	6.5	6.1
China	9.9	10.6	9.2	7.9
World	3.5	3.8	3.3	3.4

Source: *Global Insight, August 16, 2006*

second quarter (compared with 10.3 percent in the first), Global Insight predicts that the Chinese government will have some success in slowing growth from more than 10 percent this year to around 9 percent next year. Table I.1 shows Global Insight's global economic forecast.

Canada's economy has been adjusting well to the higher value of the Canadian dollar. It has appreciated about 40 percent against U.S. dollar since 2002. Rising business investment, especially in energy projects, will support continued growth. But the headwinds of a strong domestic currency and the slowing U.S. economy will hurt Canadian growth

down the road. Construction is robust in the western provinces, but slowing has started in Ontario and Quebec. The new conservative government is cutting taxes, which will stimulate demand. Countering this stimulus is the expected interest rate increase by the Bank of Canada to fend off inflation risk.

Mexico is enjoying strong economic growth in 2006, but the slowing U.S. economy will dampen the growth momentum. Mexico's growth rate is expected to average 3 to 4 percent in the next few years. This is better than the first half of this decade, but much lower than 4 to 6 percent growth in the late 1990s.

In South America, a robust global economy and high commodity prices are supporting growth. Global Insight expects that a retreat from market reforms of the 1990s dims prospects for long-term investment and growth.

Eurozone economic growth has picked up, led by exports and investment. The Eurozone economy posted second-quarter growth of 0.9 percent, or 3.6 percent seasonally adjusted annual growth. It was the best performance in six years. Business confidence is high. Healthy profits and better growth prospects will encourage firms to upgrade capacity and increase hiring. Economic confidence reached 5-year high in July, while the unemployment rate fell to a record low of 7.8 percent in June.

However, the appreciation of the euro and increasingly tight monetary and fiscal policies will slow growth in coming months. The European Central Bank raised its key interest rate by 25 basis points to 3 percent in early August, saying that the risk of inflation was persistent. The slowing U.S. economy is another concern. In addition, key obstacles to growth remain: an aging population, inflexible labor markets, costly pensions, and high tax rates.

The U.K. economy is returning to its trend growth after a sharp slowdown in 2005. Business investment and exports will lead the economy, but consumer spending remains weak. Increased spending on health and education will lead to budget deficit, but it will be a fiscal stimulus to the economy. As the country prepares for the 2012 Summer Olympics in London, a large investment in the hospitality and recreation industries will begin in the near future.

Japan has shown that its growth is sustainable for now. An improving business outlook revealed in the Tankan survey is another indication that the growth momentum will remain. In July, the Bank of Japan hiked interest rates from virtually zero to 0.25 percent. This is the first increase in almost six years. The Bank is confident that the Japanese economy is pulling out of economy-wide deflation (price decrease) that has plagued the country for almost a decade. The increase also signals that the rate hike is not going to hurt the current growth momentum.

Challenges remain. The Japanese yen is expected to appreciate, restraining export growth that provided the initial stimulus to the current expansion. Japan's population is declining and is expected to decline further. Japan has the highest government debt among the most advanced economies. Its debt is over 180 percent of the value of current economic production (Gross Domestic Product, or GDP), about three times higher than the U.S. as a ratio of GDP. Fiscal policy will have to tighten, resulting in less stimulus coming from the public sector.

Asia remains a world economic growth leader as a group. Many Asian countries are export-oriented economies, but the benefits from trade are now spilling over to the domestic side, resulting in a more balanced growth. On top of high growth, these economies have high saving rates. That means they will also be capital exporters to the rest of the world, including the U.S. Still, they remain very much vulnerable to fluctuations in global markets. Asia, China, India, and South Korea are expected to post very strong growth in the next few years. Hong Kong and Singapore are also expected to do very well.

In 2005, China surpassed France and the U.K. to become the fourth-largest economy in the world. Global Insight expects that it will overtake Germany as the third-largest by 2008. China has continued its red-hot economic growth and it does not seem to slow down on its own. However, the government is taking actions to curb excessive investment, and its currency renminbi is expected to further appreciate. Combined, they may put a little dent in economic growth, but the forces are strong for a continuous high economic growth. A transition to a more open political system in the future is a challenge, which may come at the expense of an economic slowdown.

India will continue its high economic growth. Its growth will be in the 7 to 8 percent range in the next three years. The export sector is very strong thanks to information technology services, pharmaceuticals, business outsourcing, and financial services. A surge in consumer spending and home-building is backed by the growth of the urban middle class and increased credit availability. Still, for long term sustained growth India needs vast improvement in infrastructure and a move toward a more open economy with less trade restrictions.

Table I. 2

Projected Growth for Top U.S. Export Markets						
Goods Exported	Ranked by \$ Value of U.S. Exports 2005	Oregon		Projected Change in real GDP		
		Exports 2005	Exports 2005	2004	2005	2006
		Rank (\$ mil.)	2004	2005	2006	2007
Canada	1	2,237	3.3	2.9	3.2	2.9
Mexico	5	811	4.2	3.0	3.9	3.4
Japan	3	1,210	2.3	2.6	3.0	2.3
United Kingdom	15	221	3.3	1.9	2.5	2.4
China	6	805	10.1	9.9	10.0	8.9
Germany	11	320	1.6	1.0	1.9	1.3
South Korea	2	1,308	4.6	4.0	5.2	4.9
Netherlands	16	173	1.7	1.1	2.4	2.1
Taiwan	7	640	6.1	4.1	4.0	4.0
France	14	223	2.0	1.2	2.0	1.9
Singapore	9	357	8.7	6.4	6.3	5.4
Belgium	21	74	2.4	1.5	2.5	2.0
Hong Kong	13	230	8.6	7.3	5.7	4.6
Australia	10	350	3.5	2.5	3.0	2.7
Brazil	33	40	4.9	2.3	3.6	3.7
U.S.			3.9	3.2	3.4	2.7

Source: Blue Chip Economic Indicators, August 10, 2006
Oregon Export Data: WISER, May 2006

Graph I. 1

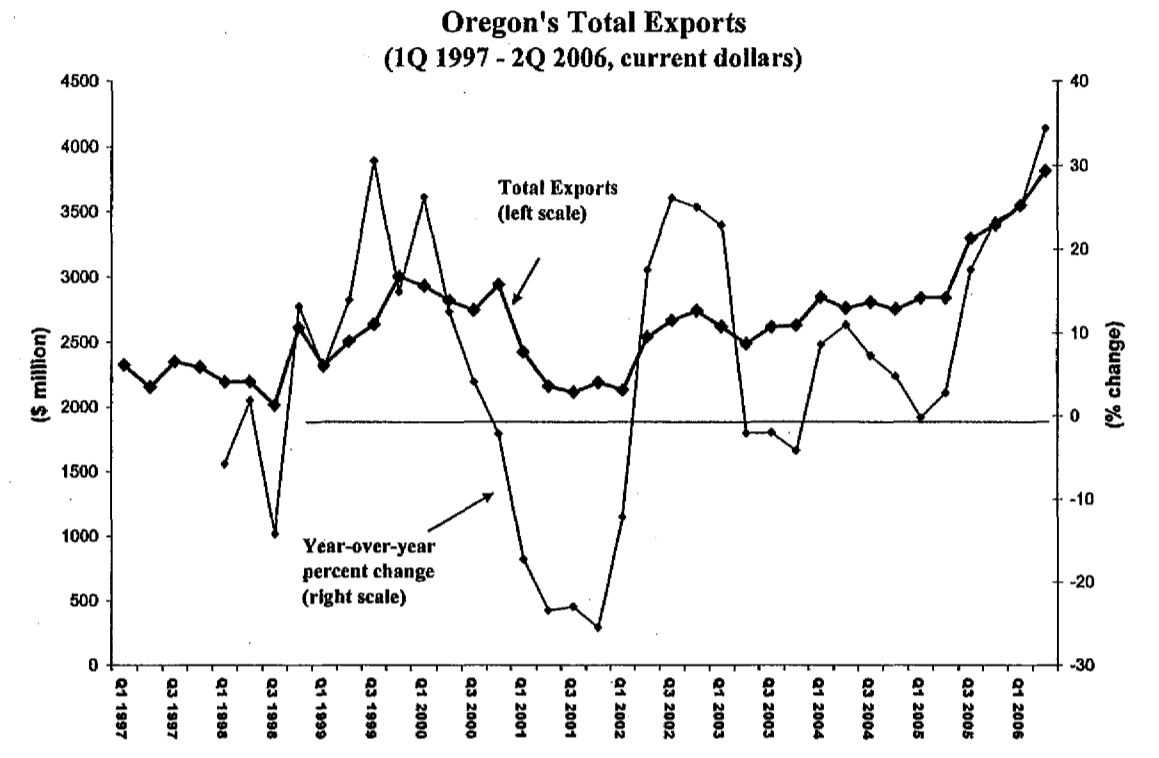


Table I.2 summarizes the Blue Chip Consensus forecast (August 2006) for Oregon's major export markets. It is consistent with the Global Insight forecast shown in Table I.1. The global economy has been expanding very rapidly in the past three years. However, 2007 forecast clearly indicates that almost all the countries will experience substantial slowdown. Still, no recession is expected in 2007.

Table I. 3

Oregon Exports by Industry (\$ millions, current prices)			
	2Q 2005 YTD	2Q 2006 YTD	y/y % change
Total All Industries	5,680.9	7,367.9	29.7%
COMPUTER AND ELECTRONIC PRODUCTS	1,857.9	3,178.0	71.1%
TRANSPORTATION EQUIPMENT	830.3	955.1	15.0%
AGRICULTURAL PRODUCTS	671.6	711.4	5.9%
MACHINERY, EXCEPT ELECTRICAL	671.3	706.9	5.3%
PRIMARY METAL MANUFACTURING	183.7	251.4	36.8%
CHEMICALS	301.7	248.0	-17.8%
WOOD PRODUCTS	179.0	182.4	1.9%
PAPER	173.8	166.7	-4.1%
WASTE AND SCRAP	67.2	152.6	127.0%
FOOD AND KINDRED PRODUCTS	142.3	145.1	2.0%

Source: WISER, August 2006

Oregon Exports

WISER (World Institute of Social and Economic Research) data show that Oregon's exports increased 29.7 percent (\$7.4 billion in total) in the first half of 2006 from a year ago. The nation as a whole experienced an increase of 13.8 percent during the same period. After a flat first half of 2005, Oregon saw a substantial increase in exports, starting in the second half of 2005. The strong first half of 2006 follows an equally strong second half 2005 export growth.

Graph I.1 illustrates Oregon's total exports.

A close examination reveals that the most growth came from exports of computer and electronics products. In fact, this sector saw its exports grow 71.1 percent from a year ago, totaling \$3,178.0 million. This sector alone explains 43.1 percent of total Oregon exports. Malaysia (\$547.3 million) now ranks first as this sector's export destination, followed by China, the Philippines, South Korea, and Costa Rica. Table I.3 shows Oregon's exports and growth rates by industry for year-to-date in 2006. These are the top ten industries by export volume (in value).

Out of these major sectors, exports of transportation equipment, agricultural products, and non-electrical machinery also increased. Exports of primary metals increased sharply.

Graph I.2 illustrates quarterly exports by major industry since 1997. The graph demonstrates a rapid increase since the third quarter of 2005. It reflects a major rebound in exports to South Korea, China, Malaysia and other Southeast Asian countries. The graph also shows a steady increasing trend in transportation equipment and non-electrical machinery. Despite occasional ups and downs, a slightly increasing trend is observed for the exports of agricultural products.

Table I.4 charts exports to major destinations for Oregon products. Through the second quarter of 2006 exports to Canada increased 13.5 percent from a year ago to \$1,328.4 million, thanks to continued growth in Canada. The strong gains in exports of transportation equipment and non-electrical machinery products explain most of the gains. In 2005, the top three exports to Canada were transportation equipment, primary metal products and computer and electronic products.

Graph I. 2

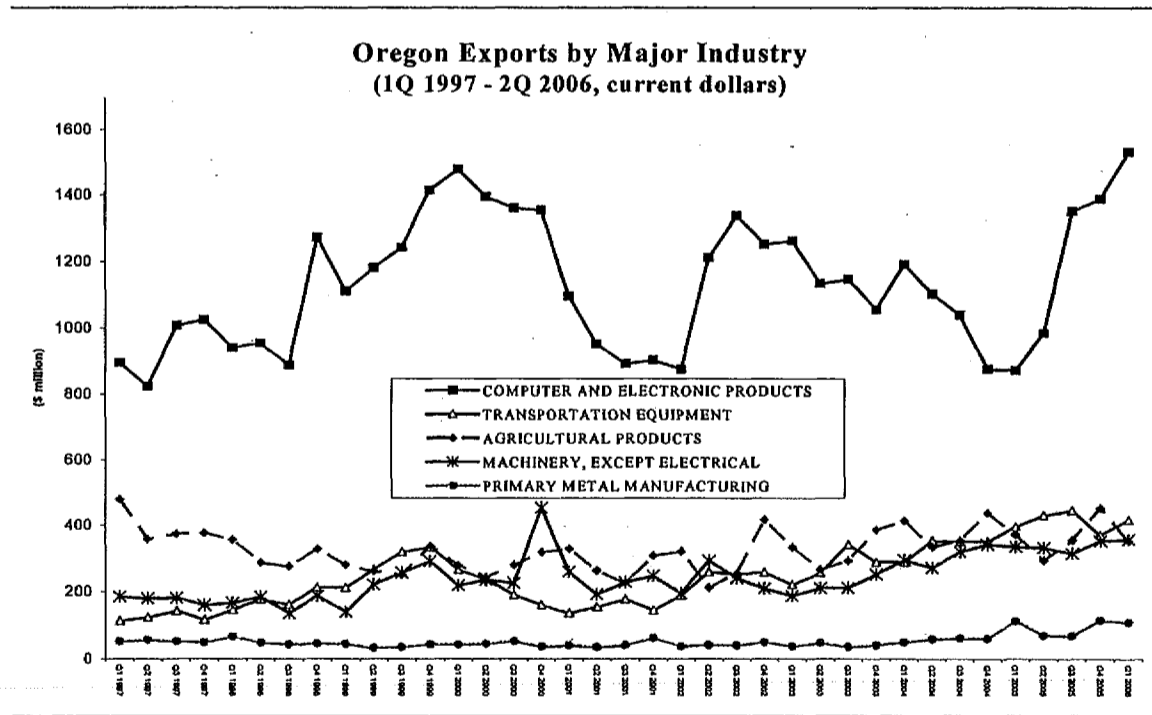


Table I. 4

Oregon Exports to Major Trading Partners (\$ millions, current prices)			
	2Q 2005	2Q 2006	y/y %
	YTD	YTD	change
Total All Countries	5,680.9	7,367.9	29.7%
CANADA	1,169.9	1,328.4	13.5%
KOREA, REPUBLIC OF	632.2	651.4	3.0%
CHINA (MAINLAND)	299.3	644.2	115.2%
JAPAN	611.4	598.1	-2.2%
MALAYSIA	268.7	572.2	112.9%
PHILIPPINES	248.0	488.1	96.8%
CHINA (TAIWAN)	293.7	426.1	45.1%
MEXICO	410.2	408.3	-0.5%
COSTA RICA	74.6	263.2	252.7%
SINGAPORE	151.5	221.5	46.2%
GERMANY	151.7	174.5	15.1%
AUSTRALIA	195.7	160.9	-17.8%
UNITED KINGDOM	111.7	149.9	34.2%
ITALY	55.0	126.0	129.2%
HONG KONG	97.8	116.0	18.6%

Source: WISER, August 2006

of \$572.2 million).

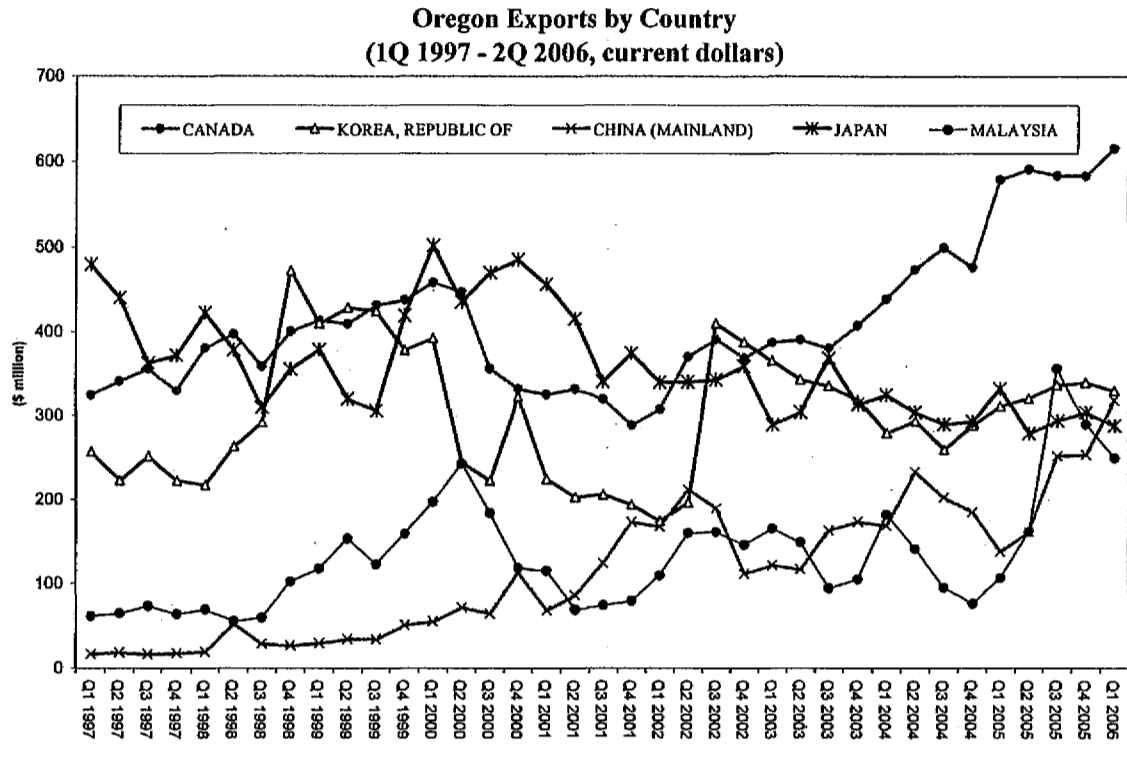
A decline in exports to Japan is a big disappointment considering the steady expansion in the country. Exports of agricultural and computer and electronics products posted double digit gains but other sectors did not do as well. In particular, exports of non-electrical machinery, wood products, and chemicals declined. Still, more consumer and business spending should increase Japan's demand for Oregon products as Japan continues its sustainable growth.

Graph I.3 shows the quarterly export trend for Oregon's major markets since 1997. Exports to Canada have accelerated again in the second quarter of 2006 while the rate of growth of exports to South Korea declined a little bit. It had been expected for quite some time that exports to China would increase, but there had been some false starts. The recent rapid growth is mostly led by computer and electronics products. Unless there is diversification of exports to China, it may be hard to achieve consistent export growth. Exports to Malaysia are strong on a y/y basis. Exports to Japan show a slight downward trend.

Exports to South Korea increased 3.0 percent during the first half of 2006, following a 16.6 percent in 2005. An ongoing economic expansion in Korea and the growing demand for information technology products are behind this increase. Solid growth in Korea demanded more of Oregon's computer and electronics products, chemicals, and non-electrical machinery. Exports of agricultural products declined slightly.

Exports to China and Malaysia increased sharply in the first half of 2006. The bulk of exports to China come from computer and electronic products (\$436.4 million out of \$644.2 in the first half of 2006). Even more concentration is seen in Malaysia (\$547.3 million out

Graph I. 3



C. Western Region Demographic Review

Introduction

This section presents population and race/ethnic trends in the western states that encompass Arizona, California, Idaho, Nevada, Oregon, Utah, and Washington. A fast rate of population growth in a state is an indicator of strong economic, environmental, and social health. The western states have traditionally been a region of high growth made possible by retaining resident population and attracting migrants from other states and from abroad. Several western states have been leaders in high technology related industries attracting highly educated workers from all over the world.

Population Growth

Table W.1 shows the population in 2000 and 2005 in the U.S. and the western states. The Census 2000 enumerated 53,843,179 persons in the western region which has grown to 58,313,742 persons in 2005. The region was home for 19.7 percent of the U.S. population. However, the region accounted for nearly 30 percent of the U.S. population change between 2000 and 2005. The above average growth is the proof of overall attractiveness of the region. Four of the seven western states ranked in the top ten fastest growing states in the nation. In terms of percent change between 2000 and 2005, Nevada (20.8 percent) and Arizona (15.8 percent) ranked 1st and 2nd, respectively, in the nation. Similarly, Utah (10.6 percent) and Idaho (10.4 percent) ranked 5th and 6th respectively. All seven states ranked in the top 15 in the nation in population growth rate during the same period. By comparison, the U. S. population changed by 5.3 percent during the 2000-2005 period. Oregon, one of the fast growing states during the 1990s, had the slowest growth rate (6.4 percent) among the western states. California's numeric population increase (2,260,499) was the highest in the nation for the period.

Table W. 1

Population change in the United States and the Western States April 1, 2000 - July 1, 2005				
Geographic Area	July 1, 2005	April 1, 2000	% change	National ranking in growth rate
United States	296,410,404	281,421,906	5.3%	---
Western states	58,313,742	53,843,179	8.3%	---
Arizona	5,939,292	5,130,632	15.8%	2
California	36,132,147	33,871,648	6.7%	13
Idaho	1,429,096	1,293,953	10.4%	6
Nevada	2,414,807	1,998,257	20.8%	1
Oregon	3,641,056	3,421,399	6.4%	14
Utah	2,469,585	2,233,169	10.6%	5
Washington	6,287,759	5,894,121	6.7%	12

Source: Population Division, U.S. Census Bureau

Table W. 2

Cumulative Estimates of the Components of Population Change: April 1, 2000 to July 1, 2005

Geographic Area	Total Population Change*	Natural Increase			Net Migration		
		Total	Births	Deaths	Total	Net International Migration	Net Internal Migration
United States	14,985,802	8,651,861	21,329,804	12,677,943	6,333,941	6,333,941	---
Western states	4,503,124	2,381,156	4,434,905	2,053,749	2,121,968	1,921,077	200,891
Arizona	817,970	241,732	462,739	221,007	576,238	168,078	408,160
California	2,308,531	1,557,112	2,781,539	1,224,427	751,419	1,415,879	-664,460
Idaho	134,679	58,884	111,131	52,247	75,795	14,522	61,273
Nevada	418,704	81,661	170,451	88,790	337,043	66,098	270,945
Oregon	225,280	75,196	236,557	161,361	150,084	72,263	77,821
Utah	202,584	186,411	254,433	68,022	16,173	49,995	-33,822
Washington	395,376	180,160	418,055	237,895	215,216	134,242	80,974

*Total population change includes residual - see "State and County Terms & Definitions"

Note: Western states migration includes movement between states within the region.

Source: Population Division, U.S. Census Bureau

Table W.2 shows the components of the population change in the U.S. and western states between the years 2000 and 2005. Overall, 53.3 percent of the change in the western states came from natural increase (births minus deaths) and migration accounted for 47.5 percent. Majority of the change due to migration in the west came from international migration which was nearly 10 times higher than the domestic migration.

There is a wide variation by state in the role of each component of change. The fastest growing state in the nation had 19.5 percent of the change due to natural increase and 80.5 percent coming from migration, most of which was domestic migration. Utah, the fifth fastest growing state in the nation, only 8 percent of the population change was due to migration and 92 percent was attributed to natural increase due to a very high birth rate. Both the rate of natural increase and birth rate in Utah were the highest in the nation. The majority of the migration related change in Arizona, Idaho, Nevada, and Oregon came from the domestic component of migration. California and Utah, however, lost their population to other states, yet total migration remained positive because of relatively high international migration.

According to the American Community Survey of the U.S. Census Bureau, Utah residents are least mobile in the Western region. In 2005, all the western states, except Utah (62.8 percent) and California (51.9 percent), had majority of their populations were born outside of the state of residence. Only 21.8 percent of the Nevada residents were native born.

Age Structure

Age composition of any population, simply put, is the function of births, deaths, and migration patterns over a long period of time. Age structure affects state's employment, economy, its potential and public spending needs. Children require public support for education and elderly require support in financial and health care areas. As major budget drivers, higher percentage of either or both of these groups seriously affects public spending.

Table W. 3

Children and elderly populations, dependency ratio, and median age: July 1, 2005

Geographic Area	under age 18	age 65+	age 85+	Dependency ratio	Median age
United States	24.8%	12.4%	1.7%	52.4%	36.2
Arizona	26.6%	12.8%	1.5%	57.7%	34.4
California	26.9%	10.7%	1.5%	53.0%	34.3
Idaho	26.2%	11.5%	1.6%	52.9%	34.5
Nevada	25.7%	11.3%	1.1%	52.4%	35.1
Oregon	23.3%	12.9%	2.0%	50.4%	37.0
Utah	30.1%	8.7%	1.1%	55.6%	28.5
Washington	23.6%	11.5%	1.8%	47.6%	36.5

Dependency ratio = ratio of <16 and 65+ populations to the working-age (16-64) population.

Source: Population Division, U.S. Census Bureau

Table W.3 shows the percentage of children and elderly, and the median age of the population. With the highest birth rate in the nation, Utah had the highest percentage of children and lowest percentage of elderly population in the region. This combination has resulted in the youngest population, median age 28.5, of the seven western states. Oregon, on the other hand, has the highest median age (37.0) due to the combination of lowest percentage of children (23.1 percent) and highest percentages of overall elderly (12.9 percent) and oldest elderly (2.0 percent). The oldest elderly require serious medical and nursing home services.

Dependency ratio is the ratio of children and elderly, who are supposed to be financial dependent, to working-age population. A combination of lower percentage of children and higher percentage of elderly population has resulted in lower dependency ratio in Washington and Oregon. Dependency ratio was highest in Arizona due to higher percentages of both children and elderly.

Race and Ethnicity

Table W.4 shows population by race and Hispanic or Latino origin in 2005. The western states together have percentage of white non-Hispanic (54.9 percent) was lower than the U.S. (66.9 percent). This indicates more racial/ethnic diversity in the western states. However, looking at the state data individually, only Arizona, California, and Nevada had fewer percentage of non-Hispanic whites than the U.S. The lower percentage of white non-Hispanic was not accompanied by a better mix of different racial groups; rather it was characterized by a higher percentage of the Hispanic or Latino group. California is only one of four majority-minority states in the country where the majority white non-Hispanic population has fallen below 50 percent mark.

All the states in the western region had percentage of African-American population lower than the national average. Arizona had relatively high concentration of American Indian and California has higher percentage of Asian and Pacific Islander population. California had the highest share of Hispanic population in the nation. More than one in three persons in California is of Hispanic or Latino origin.

Table W. 4

Population by race and Hispanic or Latino origin, July 1, 2005								
State	Total population	Non-Hispanic					Two or more races	Hispanic (of any race)
		One race						
		White	Black	Am. Indian	Asian & Pacific Islander			
United States	296,410,404	66.9%	12.3%	0.8%	4.3%	1.3%	14.4%	
Western states	58,313,742	54.9%	5.0%	1.1%	9.2%	2.0%	27.9%	
Arizona	5,939,292	60.4%	3.2%	4.5%	2.2%	1.2%	28.5%	
California	36,132,147	43.8%	6.2%	0.5%	12.3%	2.0%	35.2%	
Idaho	1,429,096	87.0%	0.5%	1.2%	1.1%	1.2%	9.1%	
Nevada	2,414,807	60.0%	7.2%	1.1%	6.0%	2.2%	23.5%	
Oregon	3,641,056	81.6%	1.6%	1.1%	3.6%	2.1%	9.9%	
Utah	2,469,585	83.5%	0.8%	1.1%	2.5%	1.2%	10.9%	
Washington	6,287,759	77.1%	3.3%	1.5%	6.7%	2.7%	8.8%	

Source: Population Division, U.S. Census Bureau

As mentioned earlier, western states rank highly in the U.S. in terms of overall population growth. The population growths nationally and in the western states have been fueled by minority population growth. Of the total population change between 2000 and 2005, the majority white non-Hispanic population increase accounted for merely 18.6 percent in the U.S. and by 16.1 percent in the western states. Hispanic population growth in the recent years has been remarkable. Between 2000 and 2005, Hispanic population increased by 20.9 percent in the U.S. In the western states, the growth ranged from 16 percent in California to 44.3 percent in Nevada. Overall, the Hispanic population change accounted for 58.5 percent of the total population change in the western states. Nearly 78 percent of the population change in California involved increased Hispanic population.

A faster growth of minority population groups has given rise to a more diverse racial and ethnic landscape. Growth in a minority population group requires racial tolerance by the majority and other race-ethnic groups. Increase in a minority population provides new business opportunities

Table W.5

Population change by race and Hispanic origin, April 1, 2000 - July 1, 2005						
State	Total population change		White non-Hispanic alone		Hispanic (any race)	
	Number	Percent	Number	Percent	Number	Percent
United States	14,988,498	5.3%	2,790,952	1.4%	7,381,406	20.9%
Arizona	808,660	15.8%	296,793	9.0%	397,313	30.7%
California	2,260,499	6.7%	-229,660	-1.4%	1,756,406	16.0%
Idaho	135,143	10.4%	99,554	8.7%	28,190	27.7%
Nevada	416,550	20.8%	137,488	10.5%	174,386	44.3%
Oregon	219,657	6.4%	98,405	3.4%	84,471	30.7%
Utah	236,416	10.6%	152,725	8.0%	66,675	33.1%
Washington	393,638	6.7%	165,315	3.5%	109,862	24.9%

Source: Population Division, U.S. Census Bureau

as well as challenges to provide services to the minority groups. In general, the fast growing

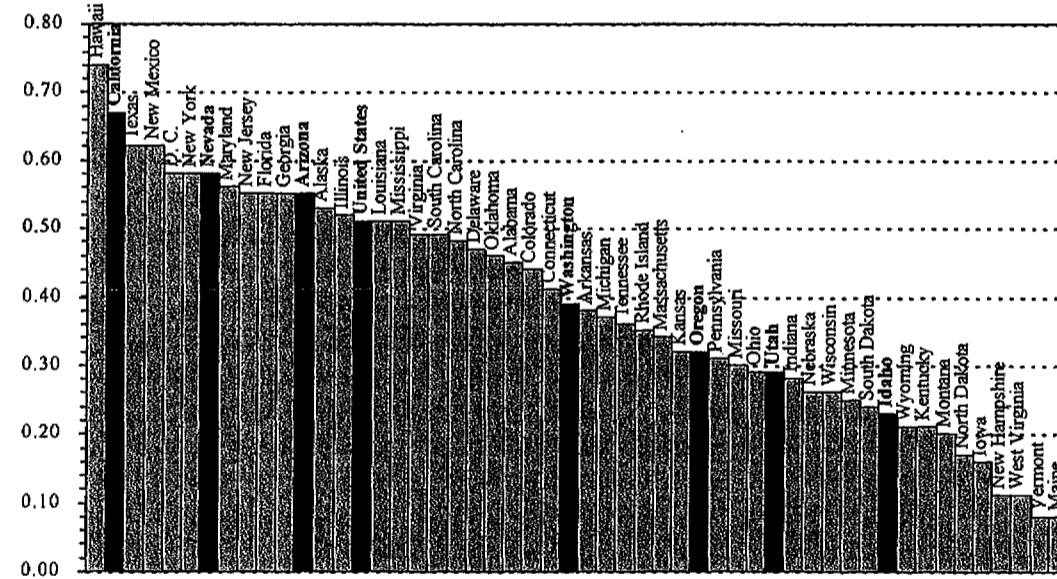
Hispanic population tends to be younger, have more children, have a higher poverty rate, lower homeownership rate, lower education attainment, etc. These involve challenges that need to be addressed, and housing needs and overall business opportunities to be tapped. Minority owned and minority centered businesses have been booming all over the country. At the same time, minority purchasing power has been growing very rapidly. Civilian labor force projections prepared by the Bureau of Labor Statistics indicate that between 2005 and 2014, U.S. labor force will increase from 149.132 million to 162.100 million – an increase of 12.968 million. Of this increase labor force, 80.3 percent will come from minority populations and 19.7 percent from White non-Hispanic group. Therefore, the nation will heavily depend upon minority labor force in the future.

Graph W.1 shows the Index of Diversity for the states, District of Columbia, and the U.S. The index is computed taking each non-Hispanic race category individually and a Hispanic group that includes people of any race sharing a common ethnic thread. The index ranges from 0, which means complete homogeneous, to 1 which represents a perfectly heterogeneous population. Hawaii is the most diverse state and Maine is the least diverse state in the U.S. In the western region, California, Nevada, and Arizona are more diverse than the national average, whereas Washington, Oregon, Utah, and Idaho are subsequently less diverse states.

Graph W. 1

Index of Diversity, 2005

1 = heterogenous, 0 = homogenous



Index of Diversity: $D = 1 - \sum p^2$, where p is proportion of individuals in a race category. For this calculation, each race group of non-Hispanic population and one Hispanic category of all race groups were used.

Source: Census Bureau

D. Oregon Economic Review and Forecast

Summary of Recent Trends

The second quarter initial estimate of job growth was an increase of 1.4 percent at an annual rate. This is the twelfth consecutive quarterly growth in jobs but breaks a string of eight quarters of growth above 2.0 percent. On a Y/Y basis, jobs increased in the second quarter by 3.6 percent. Y/Y growth has been above 2.0 percent since the second quarter of 2004.

The slower pace of job growth for the second quarter was spread across a number of sectors. Volatile sectors such as wood products and food had seasonally adjusted job declines. But the last job losses for wholesale trade and leisure and hospitality occurred in the first quarter of 2004. Job losses in government also contributed to the slower growth. Construction, while registering a job growth of 2.6 percent for the second quarter, this is the first quarter in two years for growth to be below five percent. Retail trade job growth of 1.0 percent is the first quarter below three percent growth since the first quarter of 2004.

Other sectors still pushed forward with strong growth in the second quarter. Computer and electronic products, transportation equipment, information, financial activities, professional and business services all kept their relative job growth numbers of the past two years.

The most recent Blue Chip Job Growth rankings place Oregon 5th in the nation. For Y/Y job growth, between June 2005 and June 2006, jobs increased by 59,300 or 3.59 percent. A year ago, Oregon ranked 8th. The relative performance of the fifty states is shown in Figure O.1.

Nevada ranked 1st. California rose from 26th place to 22nd, while Idaho moved up from 5th to 2nd. Washington job gains place it 7th among the 50 states.

OEA's forecast for the second quarter annualized job growth was a positive 1.0 percent compared to the reported positive 1.4 percent. Details of actual second quarter growth compared to the June 2006 forecast are shown in Table O.1. Table O.1 shows annualized growth comparisons and Y/Y growth. Unless noted otherwise, all percentage rates discussed below reflect annualized rates of change for the second quarter of 2006.

Total Private Employment increased by 6,240 jobs, a 1.8 percent rise from the first quarter. The Y/Y employment was up by 4.4 percent. Both manufacturing and private nonmanufacturing added

Figure O. 1

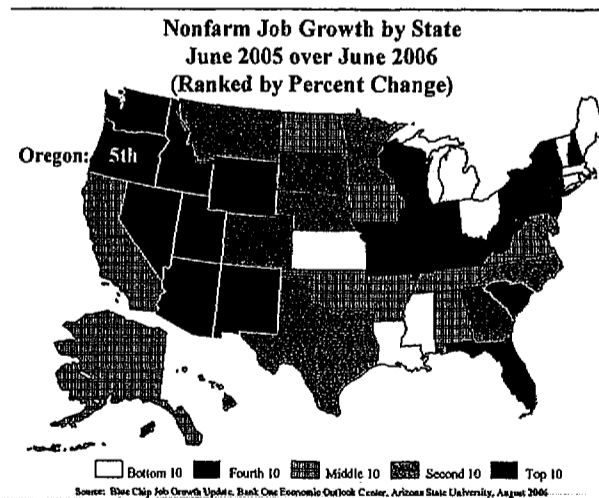


Table O. 1

Total Nonfarm Employment, 2nd quarter 2006
(Employment in thousands, Annualized Percent Change)

	Preliminary Estimate		Forecast		Forecast Error		Y/Y Change
	level	% ch	level	% ch	level	%	% ch
Total Nonfarm	1,710.2	1.4	1,708.0	1.0	2.2	0.1	3.6
Total Private	1,424.3	1.8	1,420.8	0.9	3.6	0.3	4.4
Natural Resources and Mining	9.3	19.6	8.8	(1.5)	0.5	5.5	(1.9)
Construction	100.4	2.6	99.5	(1.5)	0.9	0.9	12.0
Manufacturing	210.8	0.7	210.3	(0.5)	0.5	0.3	3.3
Durable Goods	156.1	0.8	156.2	0.8	(0.1)	(0.0)	2.5
Wood Product	32.4	(2.2)	32.9	2.6	(0.5)	(1.6)	(1.3)
Metals and Machinery	36.5	(1.1)	36.6	0.5	(0.2)	(0.4)	1.2
Computer and Electronic Product	43.0	2.7	42.8	0.5	0.2	0.5	3.8
Transportation Equipment	19.4	7.4	18.9	(2.0)	0.5	2.5	8.1
Other Durable Goods	24.8	(0.3)	24.9	1.0	(0.1)	(0.3)	3.3
Nondurable Goods	54.7	0.2	54.1	(3.7)	0.6	1.1	5.7
Food	23.0	(7.0)	22.8	(10.0)	0.1	0.6	6.1
Other Nondurable Goods	31.7	5.8	31.2	0.3	0.5	1.5	5.4
Trade, Transportation & Utilities	337.6	0.9	337.4	0.9	0.2	0.1	3.2
Retail Trade	200.2	1.0	199.8	0.5	0.4	0.2	4.1
Wholesale Trade	79.8	(0.8)	80.2	1.1	(0.3)	(0.4)	2.8
Transportation, Warehousing & Utilities	57.6	2.8	57.4	2.1	0.2	0.3	0.8
Information	33.9	2.6	33.8	2.0	0.1	0.3	1.5
Financial Activities	106.5	2.5	106.1	0.5	0.5	0.4	5.1
Professional & Business Services	193.6	4.1	192.3	1.5	1.3	0.7	5.0
Educational & Health Services	207.6	2.1	207.2	0.5	0.4	0.2	4.6
Educational Services	30.1	3.8	30.0	1.0	0.1	0.4	10.0
Health Services	177.5	1.8	177.2	0.7	0.3	0.2	3.7
Leisure and Hospitality	165.3	(0.1)	166.2	1.7	(0.9)	(0.5)	3.9
Other Services	59.3	2.4	59.2	1.4	0.1	0.1	3.4
Government	285.8	(0.5)	287.3	1.6	(1.4)	(0.5)	(0.1)
Federal	29.0	(3.7)	29.4	1.2	(0.4)	(1.3)	(2.7)
State	76.4	(2.2)	77.0	1.2	(0.7)	(0.9)	(0.9)
State Education	27.3	(0.7)	27.4	1.3	(0.1)	(0.3)	(1.5)
Local	180.5	0.8	180.9	1.6	(0.4)	(0.2)	0.6
Local Education	95.5	1.8	95.5	1.8	(0.0)	(0.0)	0.4

jobs at rates of 0.7 percent and 2.0 percent, respectively. The government sector slightly declined with a loss of 340 jobs for a 0.5 percent decrease.

Within manufacturing, transportation equipment had the highest growth. This sector added 400 jobs for a 7.4 percent increase. Despite high gasoline prices, low interest rates and a rebounding economy have helped this sector since the second quarter of 2003.

The computer and electrical product subsector, which includes semiconductors and electronic instrument manufacturing, added 290 jobs for a 2.7 percent increase. Although jobs increased by

3,200 since the first quarter of 2004, this sector has a long ways to go to replace the 11,200 jobs lost during the downturn.

Wood products employment shows some continued slowing from the strong growth of 2004 and early 2005 with job losses of 2.2 percent. Metals and machinery show a similar employment pattern with losses of 1.1 percent.

Non-durable manufacturing jobs increased by 0.2 percent. Food products jobs declined by 7.0 percent for the quarter. This subsector has been very volatile due to industry restructuring and seasonal factors. Although this quarter reports job losses for food products, the Y/Y growth rate is up 6.1 percent.

Private non-manufacturing employment increased by 2.0 percent. Major contributors to this increase were construction, professional and business services, educational services, information, and transportation, warehousing, and utilities.

Construction employment growth slowed to 2.6 percent with Y/Y growth a very strong 12.0 percent. Retail and wholesale trade reflect the slower pace with job gains of 1.0 percent and a decline of 0.8 percent, respectively. Transportation, warehousing, and utilities posted job growth at 2.8 percent.

Information, which includes publishers of software along with more traditional publishers such as newspapers, bounced back from the past two quarters with a 2.6 percent increase in jobs. Financial activities added 2.5 percent more jobs while professional and business services reported a strong job growth of 4.1 percent.

Educational services have been quite volatile with wide seasonal swings. The job growth in the second quarter was 3.8 percent with Y/Y growth of 10.0 percent. Health services continued to add jobs at the rate of 1.8 percent.

Leisure and hospitality was essentially flat with a loss of 50 jobs for a 0.1 percent decline. This is the first decline in jobs since the second quarter of 2003.

The government sector marginally declined by 0.5 percent, lead by a decrease of 3.7 percent in federal government employment. As tax revenues slowly improve, state and local government employment is starting to firm up. State government employment is still down by 0.9 percent Y/Y while local government employment is up 0.6 percent Y/Y.

Short-Term Outlook

Overview

The second quarter of 2006 marks the third year of job growth. The last three months (April to June) show a markedly slow pace for job creation. The Oregon Employment Department reports that recent job growth is running a little better than one percent compared to the 3.5 percent annual growth rate of the prior two-year period. The outlook for the national economy is for

Table O. 2

Oregon Total Nonfarm Employment and Personal Income Growth							
Forecaster	Date of Forecast	Employment			Personal Income		
		2006	2007	2008	2006	2007	2008
Moody's Economy.com	April 2006	3.0	1.5	1.5	6.1	5.0	4.9
Global Insight	Summer 2006	3.1	1.7	1.5	5.5	5.6	5.7
Wells Fargo & Co.	June 2006	2.4	2.0	NA	5.4	5.4	NA
U.S. Bank	June 2006	3.0	2.3	NA	6.2	5.8	NA
Conerly Consulting	June 2006	3.3	1.9	NA	6.7	5.3	NA
Portland General Electric	June 2006	2.3	1.9	NA	6.3	5.7	NA
OEA	July 2006	3.2	1.3	1.6	5.9	5.7	5.8
Consensus	June 2006	2.7	2.0	NA	6.1	5.6	NA
Western Blue Chip							

positive growth but at a slower rate. Given the prospects for a slowing of the housing market and the negative impacts from high energy prices, the prognosis is for slower growth in the Oregon economy. As the economy slows, it is more vulnerable to other risks, be they geopolitical or hurricane season.

OEA forecasts employment to rise by 3.2 percent for 2006, the strongest yearly growth since 1997. This annual job growth is pushed up by the strong first quarter growth of 6.3 percent. The job growths of the remaining two quarters of 2006 are projected to average 1.0 percent. Job growth in 2007 is projected to be 1.3 percent, reflecting the slowing growth projected for the national economy. The economy continues to expand with 1.6 percent job growth in 2008.

Table O.2 shown above compares OEA's forecast to other published forecasts. All forecasts project job gains and income growth. All forecasts follow a similar outlook for employment, with the strongest growth in 2006 and lower growth in 2007 and 2008. Personal income projections follow a similar pattern. OEA's outlook follows the same pattern as Global Insight into 2007, but OEA projects employment and income growth to pick up in 2008. Overall, Conerly Consulting and U.S. Bank have the most optimistic outlook while Moody's Economy.com and Wells Fargo have the mildest outlook.

Total private nonfarm employment will increase in 2006, growing by 3.9 percent. The sector will continue to improve through 2008. Total private nonfarm employment will grow 1.3 percent in 2007 and 1.7 percent in 2008. Manufacturing will increase by 2.9 percent in 2006 and then reflect mild declines of 0.5 percent in 2007 and 0.3 percent in 2008. Job levels will still be below average job levels of 2000. Private non-manufacturing jobs will increase by 4.0 percent in 2006, and 1.6 percent in 2007 and 2.0 percent in 2008. Table O.3 provides a summary of the forecast.

Wood product manufacturing is projected to be down 0.5 percent in 2006 and then decline by 2.6 percent in 2007 and 2008.

Table O. 3

Oregon Forecast Summary

	Quarterly			Annual								
	2006:2	2006:3	2006:4	2005	2006	2007	2008	2009	2010	2011	2012	2013
Personal Income (\$ billions)												
Nominal Personal Income	122.4	124.4	126.2	116.5	123.3	130.3	137.9	146.3	155.0	163.9	173.1	182.9
% change	6.8	6.8	6.1	6.1	5.9	5.7	5.8	6.1	6.0	5.7	5.6	5.6
Real Personal Income (base year=2000)	107.0	108.2	109.7	104.7	107.8	111.8	116.2	121.2	126.0	130.6	135.1	139.8
% change	2.5	4.8	5.3	3.2	3.0	3.7	4.0	4.3	4.0	3.6	3.5	3.5
Other Indicators												
Per Capita Income (\$1,000)	33.3	33.7	34.1	32.1	33.5	34.9	36.4	38.1	39.8	41.5	43.2	45.0
% change	5.3	5.3	4.6	4.7	4.4	4.2	4.3	4.6	4.5	4.3	4.2	4.2
Average Wage rate (\$1,000)	38.8	39.3	39.8	38.0	39.1	40.6	42.2	43.9	45.7	47.5	49.3	51.0
% change	4.6	5.5	5.2	4.0	2.8	3.9	3.9	4.1	4.0	3.9	3.8	3.6
Population (Millions)	3,677	3,690	3,703	3,631	3,683	3,735	3,789	3,843	3,898	3,952	4,007	4,061
% change	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4
Housing Starts (Thousands)	30.0	29.4	28.8	30.9	29.6	28.1	28.2	28.4	28.8	29.1	29.0	29.0
% change	(2.3)	(7.6)	(8.8)	12.6	(4.1)	(5.2)	0.5	0.6	1.5	1.0	(0.4)	0.3
Employment (Thousands)												
Total Nonfarm	1,710.2	1,714.5	1,718.7	1,658.2	1,711.9	1,733.3	1,760.7	1,787.1	1,810.0	1,830.6	1,849.4	1,868.0
% change	1.4	1.0	1.0	3.1	3.2	1.3	1.6	1.5	1.3	1.1	1.0	1.0
Construction	100.4	99.8	99.2	90.9	99.8	98.8	99.5	100.9	102.3	103.6	104.7	105.6
% change	2.6	(2.5)	(2.0)	10.0	9.7	(1.0)	0.8	1.4	1.4	1.3	1.0	0.9
Durable Manufacturing	156.1	156.1	155.9	152.5	156.0	155.1	154.6	154.6	154.7	154.5	154.0	153.4
% change	0.8	(0.0)	(0.5)	3.4	2.3	(0.6)	(0.4)	(0.0)	0.1	(0.2)	(0.3)	(0.4)
Wood Product	32.4	32.3	32.1	32.5	32.4	31.5	30.7	30.3	30.3	30.3	29.8	29.4
% change	(2.2)	(1.2)	(2.0)	1.3	(0.5)	(2.6)	(2.6)	(1.2)	(0.0)	(0.2)	(1.5)	(1.3)
High Tech Manufacturing	43.0	42.9	42.8	41.6	42.9	42.6	42.5	42.4	42.2	41.8	41.9	42.0
% change	2.7	(1.0)	(1.5)	1.5	3.0	(0.8)	(0.1)	(0.3)	(0.6)	(0.8)	0.2	0.2
Nondurable Manufacturing	54.7	54.5	54.3	52.0	54.5	54.4	54.3	54.0	53.8	53.7	53.4	53.2
% change	0.2	(1.2)	(1.7)	(0.7)	4.9	(0.3)	(0.2)	(0.5)	(0.4)	(0.3)	(0.4)	(0.5)
Private Nonmanufacturing	1,213.5	1,217.2	1,221.0	1,167.7	1,214.8	1,234.1	1,258.8	1,282.4	1,301.5	1,320.4	1,336.7	1,352.9
% change	2.0	1.2	1.3	3.9	4.0	1.6	2.0	1.9	1.5	1.5	1.2	1.2
Information	33.9	34.0	34.1	33.4	33.9	34.6	34.6	35.2	35.8	36.3	36.9	37.4
% change	2.6	1.6	1.3	1.5	1.5	1.9	0.2	1.6	1.6	1.4	1.7	1.5
Retail Trade	200.2	200.5	201.0	193.6	200.4	203.1	206.9	210.0	212.7	215.7	218.1	220.6
% change	1.0	0.6	1.0	3.1	3.5	1.4	1.9	1.5	1.3	1.4	1.1	1.2
Leisure and Hospitality	165.3	166.1	166.6	160.4	165.8	168.8	172.1	174.7	176.4	177.6	177.7	177.5
% change	(0.1)	2.0	1.1	3.4	3.4	1.8	2.0	1.5	1.0	0.7	0.1	(0.1)
Government	285.8	286.7	287.5	286.0	286.6	289.8	293.1	296.2	300.0	302.0	305.3	308.6
% change	(0.5)	1.1	1.2	0.8	0.2	1.1	1.1	1.1	1.3	0.7	1.1	1.1

The sector that contains semiconductors, computer and electronic products, will show gains of 3.0 percent for 2006. The job outlook is more uncertain with declines of 0.8 percent in 2007 and 0.1 percent in 2008. The outer years are projected to keep this sector in a no growth pattern.

Transportation equipment will increase by 6.2 percent in 2006. Job gains will give way to a slight decline in 2007 with a decrease of 0.5 percent. Employment will slightly decline with a loss of 0.8 percent in 2008.

Construction will increase jobs at a strong 9.7 percent in 2006. Job growth will decline with a 1.0 percent drop in 2007 before a milder job growth of 0.8 percent in 2008.

Trade job growth will have similar growth this year compared to 2005. Retail trade job growth will be stronger in 2006 at 3.5 percent and grow 1.4 percent in 2007 and 1.9 percent in 2008. Wholesale trade will be positive in 2006 with an annual job growth of 2.5 percent followed by job gains of 1.0 percent in 2007 and 0.8 percent in 2008.

Professional and business services and health services will see some of the strongest growth. Professional and business services will grow 4.9 percent in 2006 followed by 3.5 percent growth in 2007 and 3.8 percent in 2008. Health services will increase 3.6 percent, 2.0 percent, and 2.6 percent on average for the same years.

Leisure and hospitality, which includes accommodations and food services, is expected to grow by 3.4 percent in 2006, and 1.8 percent in 2007, and 2.0 percent in 2008.

Government employment is expected to increase by 0.2 percent in 2006 followed by growth of 1.1 percent in 2007 and 2008. State and local government jobs will continue mild growth as tax revenues have improved with the stronger economy.

Population growth is expected to be higher than the U.S. average, but slower than the growth experienced in the mid-1990s. Growth will be slightly higher than during the recession over the next three years, with increases of 1.4 percent for each year.

Forecast Changes Relative to the June 2006 Forecast

OEA's September 2006 Oregon economic forecast reflects minor changes to employment levels. Second quarter employment numbers were slightly stronger than forecast and this level shift is reflected through the outer years. Personal income was revised down by the Bureau of Economic Analysis for 2005. Combined with a slower estimated growth than forecasted for the first quarter of 2006 and a lower national forecast, the personal income forecast is shifted down and lowered throughout most of the forecast horizon. The revisions are 1.0 percent down in 2006 and 2007. Revisions are very small out to 2012 with a marginal up revision in 2013.

Table O.4 provides a summary of the forecast changes. Graph O.1 compares Oregon and U.S. forecasts. A comparison of the current Oregon forecast with the last two quarters is shown in Graph O.2.

The forecast for total non-farm jobs has been revised up 0.1 percent in 2006, and minimal downward revision in 2007 and 2008. Second quarter growth was stronger than expected and virtually no change to the national economic job growth outlook.

Table O. 4

Oregon Forecast Change (Current vs. Last)

	Quarterly			Annual								
	2006:2	2006:3	2006:4	2005	2006	2007	2008	2009	2010	2011	2012	2013
Personal Income (\$ billions)												
Nominal Personal Income	122.4	124.4	126.2	116.5	123.3	130.3	137.9	146.3	155.0	163.9	173.1	182.9
% change	(1.2)	(1.0)	(0.9)	(0.3)	(1.0)	(1.0)	(0.8)	(0.6)	(0.4)	(0.2)	(0.0)	0.2
Real Personal Income (base year=2000)	107.0	108.2	109.7	104.7	107.8	111.8	116.2	121.2	126.0	130.6	135.1	139.8
% change	(1.9)	(1.8)	(1.4)	(0.3)	(1.5)	(1.8)	(1.5)	(1.3)	(1.3)	(1.3)	(1.3)	(1.2)
Other Indicators												
Per Capita Income (\$1,000)	33.3	33.7	34.1	32.1	33.5	34.9	36.4	38.1	39.8	41.5	43.2	45.0
% change	(1.3)	(1.1)	(1.0)	(0.3)	(1.0)	(1.1)	(1.0)	(0.9)	(0.8)	(0.6)	(0.5)	(0.4)
Average Wage rate (\$1,000)	38.8	39.3	39.8	38.0	39.1	40.6	42.2	43.9	45.7	47.5	49.3	51.0
% change	(1.9)	(1.4)	(1.0)	(0.7)	(1.7)	(1.3)	(1.2)	(1.0)	(0.8)	(0.7)	(0.5)	(0.3)
Population (Millions)	3.677	3.690	3.703	3.631	3.683	3.735	3.789	3.843	3.898	3.952	4.007	4.061
% change	0.1	0.1	0.1	0.0	0.1	0.1	0.2	0.3	0.4	0.4	0.5	0.5
Housing Starts (Thousands)	30.0	29.4	28.8	30.9	29.6	28.1	28.2	28.4	28.8	29.1	29.0	29.0
% change	6.7	7.1	4.8	0.0	4.5	2.0	1.4	1.5	1.4	0.9	0.4	(0.0)
Employment (Thousands)												
Total Nonfarm	1,710.2	1,714.5	1,718.7	1,658.2	1,711.9	1,733.3	1,760.7	1,787.1	1,810.0	1,830.6	1,849.4	1,868.0
% change	0.1	0.1	0.1	0.0	0.1	(0.0)	(0.1)	(0.0)	0.0	0.0	0.0	(0.0)
Construction	100.4	99.8	99.2	90.9	99.8	98.8	99.5	100.9	102.3	103.6	104.7	105.6
% change	0.9	0.6	0.1	0.0	0.4	(1.2)	(1.9)	(1.9)	(2.0)	(2.2)	(2.3)	(2.5)
Durable Manufacturing	156.1	156.1	155.9	152.5	156.0	155.1	154.6	154.6	154.7	154.5	154.0	153.4
% change	(0.0)	(0.1)	(0.1)	0.0	(0.1)	(0.2)	(0.3)	(0.1)	0.1	0.3	0.3	0.2
Wood Product	32.4	32.3	32.1	32.5	32.4	31.5	30.7	30.3	30.3	30.3	29.8	29.4
% change	(1.6)	(1.8)	(1.6)	0.0	(1.4)	(1.7)	(1.4)	(0.3)	0.4	0.3	0.0	(0.4)
High Tech Manufacturing	43.0	42.9	42.8	41.6	42.9	42.6	42.5	42.4	42.2	41.8	41.9	42.0
% change	0.5	0.1	(0.3)	(0.0)	0.1	0.1	0.3	0.4	0.2	0.5	0.5	0.5
Nondurable Manufacturing	54.7	54.5	54.3	52.0	54.5	54.4	54.3	54.0	53.8	53.7	53.4	53.2
% change	1.1	1.0	0.5	0.0	0.7	0.4	0.3	0.0	0.0	0.0	(0.0)	(0.1)
Private Nonmanufacturing	1,213.5	1,217.2	1,221.0	1,167.7	1,214.8	1,234.1	1,258.8	1,282.4	1,301.5	1,320.4	1,336.7	1,352.9
% change	0.3	0.3	0.2	0.0	0.2	0.1	0.1	0.1	0.1	0.2	0.2	0.2
Information	33.9	34.0	34.1	33.4	33.9	34.6	34.6	35.2	35.8	36.3	36.9	37.4
% change	0.3	0.4	0.5	(0.0)	0.3	0.8	(0.4)	(0.5)	(0.4)	(0.6)	(0.7)	(0.9)
Retail Trade	200.2	200.5	201.0	193.6	200.4	203.1	206.9	210.0	212.7	215.7	218.1	220.6
% change	0.2	0.1	(0.1)	0.0	0.1	(0.3)	(0.2)	(0.2)	(0.1)	(0.1)	(0.1)	(0.1)
Leisure and Hospitality	165.3	166.1	166.6	160.4	165.8	168.8	172.1	174.7	176.4	177.6	177.7	177.5
% change	(0.5)	(0.5)	(0.8)	0.0	(0.5)	(0.7)	(0.8)	(0.4)	(0.3)	(0.2)	(0.2)	(0.1)
Government	285.8	286.7	287.5	286.0	286.6	289.8	293.1	296.2	300.0	302.0	305.3	308.6
% change	(0.5)	(0.5)	(0.5)	0.0	(0.4)	(0.5)	(0.5)	(0.6)	(0.6)	(0.7)	(0.7)	(0.8)

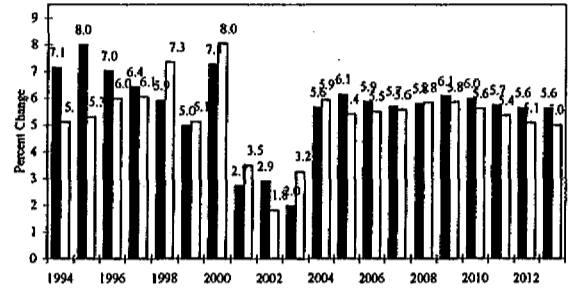
Manufacturing is raised slightly for 2006 with further slight upward revisions for the other forecast years. Both durable and nondurable manufacturing reflect the same pattern of change. Durable manufacturing forecast changes are slightly down through 2009 and then mild upward revisions in the outer years. The national outlooks for wood products and high tech manufacturing offset each other through 2008. Wood product second quarter estimates were weaker than forecast and high tech manufacturing was stronger than forecast.

Graph O. 1

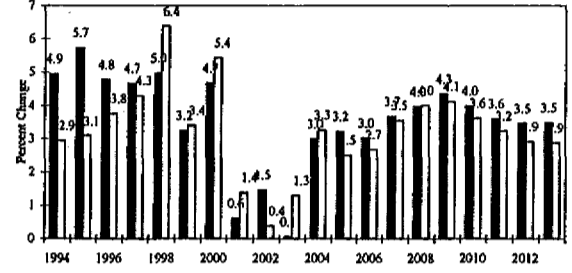
OREGON AND U.S. ECONOMIC FORECASTS

OREGON U.S.

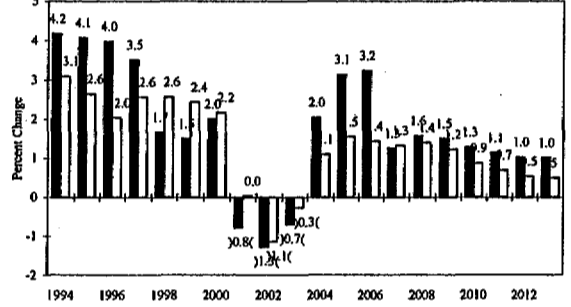
PERSONAL INCOME



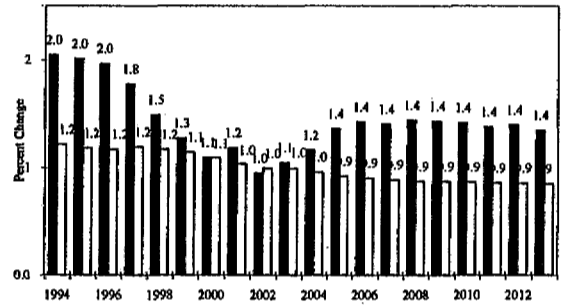
REAL PERSONAL INCOME
1996 CHAIN WEIGHTED DOLLARS



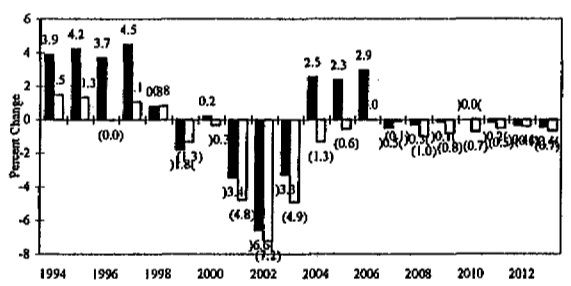
NON FARM EMPLOYMENT



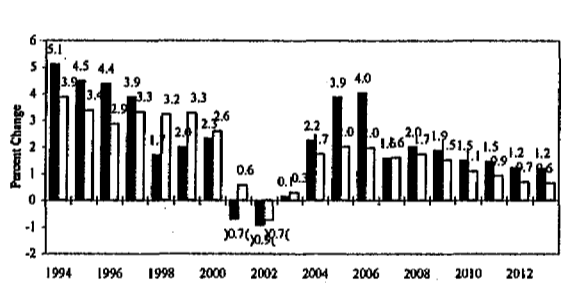
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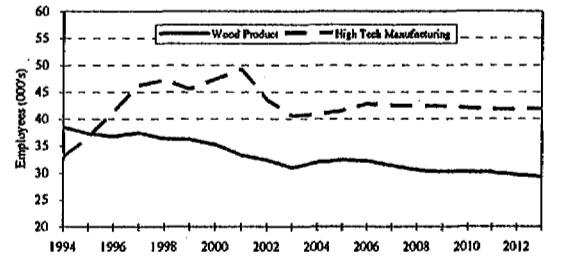
MANUFACTURING EMPLOYMENT



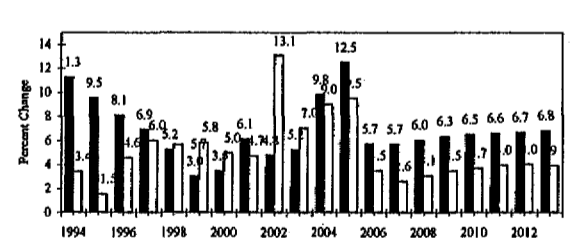
PRIVATE NON MANUFACTURING EMPLOYMENT



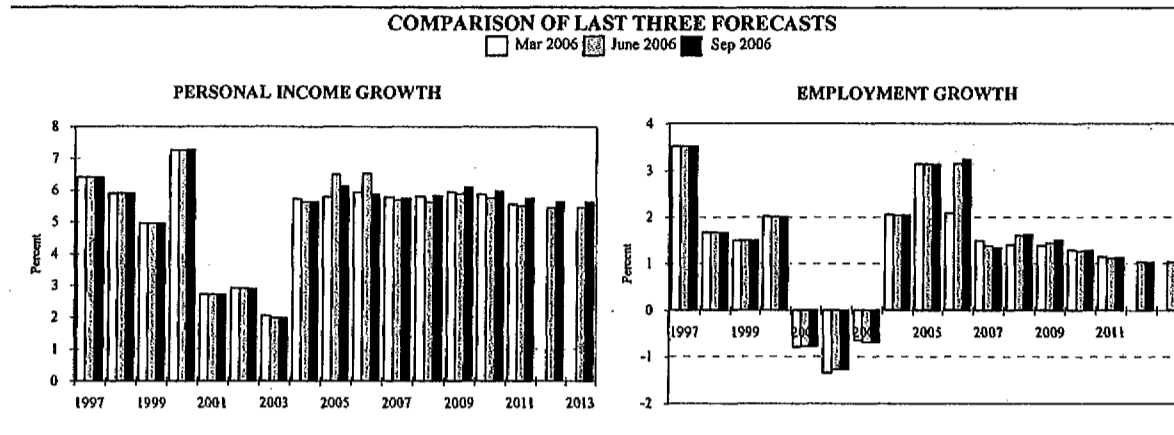
WOOD PRODUCT MANUFACTURING & HIGH TECH MANUFACTURING EMPLOYMENT



HOUSING PRICES
OREGON REPEAT PURCHASE INDEX VS. U.S. AVERAGE SALES PRICE OF EXISTING SINGLE FAMILY HOMES



Graph O. 2



After 2008, the national outlook for wood products has mildly improved with little change to the national outlook for high tech manufacturing. Nondurable manufacturing revisions are mainly due to other nondurable goods which includes paper, printing and related support activities (printing does not include publishing, which is part of the information sector) which came in stronger than estimated for the second quarter.

Private nonmanufacturing is raised to reflect better second quarter numbers. The increase holds through the outer years reflecting the level shift.

Information is raised to reflect the stronger second quarter numbers compared to forecast and the slight downward revisions in the outer years is due to a slightly lower national outlook for this sector.

Retail trade is essentially unchanged in 2006. The outer years are lowered to reflect the marginally lower national forecast for those years.

Leisure and hospitality is lowered by 0.4 percent in 2006 and 0.5 percent in 2007. The weaker than expected second quarter lowers this forecast through the forecast horizon.

The government sector is revised down 0.4 percent in 2006 and 0.5 percent in 2006. The revisions are due mainly to the weaker numbers compared to estimate for the second quarter and a lower national forecast in the outer years.

Personal Income Components

Personal income is forecast to grow by 5.9 percent in 2006, followed by growth of 5.7 percent in 2007 and 5.8 percent in 2008. Wage and salary income will grow 6.1 percent in 2006, 5.4 percent in 2007, and 5.7 percent in 2008.

Non-farm proprietors' income will grow 7.9 percent in 2006. Growth in this income component will slow to 5.4 percent in 2007 and 5.5 percent in 2008.

Per capita income in Oregon will stay below the U.S. average over the next 8 years. Oregon's population and economy is expected to grow faster than the U.S. With both components of the ratio measure growing, per capita income in Oregon will not appreciatively gain or loose ground compared to the U.S. average.

[The following two sections, Goods-Producing Sectors and Service-Producing Sectors, use information from publicly produced sources, such as newspapers, magazines, and web sites. A number of the news items used were compiled by the Oregon Employment Department and published in "Around the State".]

Goods-Producing Sectors

The rapid price appreciation along with rising mortgage rates is lowering housing affordability. The index reported by the National Association of Realtors (NAR) is down to around 104.5 for May 2006 from a high of 136.4 in February 2003. An index above 100 represents less than 25 percent of a family's income is being used to pay principle and interest payments on a mortgage. A cooling trend is moving across the housing markets throughout the U.S. NAR is also forecasting a drop in housing starts in the U.S. of 6.2 percent in 2006 and further declines of 6.3 percent in 2007. The Random Lengths Composite Price (Random Lengths Publications, June 2006) for lumber are down to \$326 per thousand feet compared to \$367 per thousand feet in April. Prices averaged \$401 per thousand feet in June 2005. As of the week of August 11, 2006, prices averaged \$291 per thousand feet, considerable below the July 2004 average of \$426 per thousand feet.

In early July, U.S. and Canada signed a trade agreement on the long debated softwood lumber market. Quotas and tariffs are to be lifted and \$4 billion of the \$5 billion collected in fees are to be returned to Canadian producers. As market prices fall below a set market value (roughly set at around \$355 per thousand board feet), a 5.0 percent tax would be imposed on Canadian imports, going as high as 15.0 percent depending on the drop in market prices. The agreement is to be binding in September but strong concerns, especially from British Columbia wood producers, could delay implementation. The intent of the agreement is to prevent a further rise in the U.S. market share of softwood lumber by Canadian imports. Oregon mills may also be impacted by the opening of new mills in Washington. The increased demand for logs in Washington could cause a shortage of logs for Oregon mills.

A number of recent company news items details changes in the wood products industry. Stimson Lumber in St. Helens laid off 45 workers in May of this year. Roseburg Forest Products has retooled its plant in Coquille, laying off 17 employees with another 25 to 35 workers losing their jobs next year. Roseburg Forest Products also announced an expansion of its engineered wood products plant in Riddle with plans to add 100 workers. Reports indicate that Georgia-Pacific plans to lay off 130 workers by mid September at its Wauna Mill in eastern Clatsop County. It was just two years ago that Georgia-Pacific completed expansion of the mill and added around

110 workers. We expect this sector to reverse the previous two years of jobs gains and mildly contract as rising mortgage rates curtails housing starts.

The computer and electronic equipment sector should see positive gains in the second half of 2006 based on improved sales projections. The three month moving average of worldwide sales of semiconductors in May grew by 9.4 percent over May 2005. The Semiconductor Industry Association (SIA) raised their chips sales growth forecast for 2006 to 9.8 percent from 7.9 percent (EETimes On-Line). The semiconductor equipment book-to-bill for June stood at 1.06, the fifth consecutive month above 1.0, which last occurred in August 2004. The competition between Intel and AMD is heating up with Intel lowering prices to regain market share and further efforts to contain costs. Intel announced 1,000 layoffs across the company but no definite statements about Oregon operations, though reports circulate that larger layoffs may occur.

In Eugene, PSC bar code scanner maker has laid off 21 workers. In the Gresham area, ON Semi announces plans to remain at the former LSI Logic factory for 20 years. Wacker Chemie AG plans to expand polysilicon production to meet demands from the solar cell industry, possibly impacting their Portland operations. At the same time, Sitronic AG has decided to expand their Singapore operation rather than its existing plant in Portland. Included in this sector are producers of aviation navigation and communication equipment, such as Garmin AT who plans to expand at the Salem Airport and add 90 workers over a four year period. Any improvement in hiring for this sector is expected to be modest and employment levels in our forecast horizon (out to 2013) to not reach previous employment levels set in early 2001. Intel's actions may also be impacting Credence Systems Corp. which announced it will lay off 14.0 percent of its global workforce, possibly impacting the 430 employees at the Hillsboro plant.

The transportation equipment sector, representing trucking, RV's, boats, air planes, railroad cars, and others, continue to do well. Western Trailer of Boise, Idaho, will open a new facility in Ontario with initial employment set between 10 and 20 employees. Transportation equipment jobs may finally feel the impact of rising interest rates and high gasoline prices. As the Environmental Protection Agency's (EPA) "2007 Heavy-Duty Highway Rule" is phased in starting with the 2007 truck model year, the pace of truck orders is expected to slow. As the U.S. economy is expected to slow in the second half of this year and 2007, the same factors of rising interest rates and uncertain gasoline prices will temper the growth of this sector. Monaco Coach Corp. in Coburg, a RV manufacturer, reports orders for motor homes are down 12.0 percent for the second quarter of this year.

Metals and machinery manufacturing has rebounded nicely with the economy. American Bridge received a large contract to work on the San Francisco-Oakland Bridge and will add workers to its Reedsport plant. Overall, we expect this industry to follow the U.S. sector with mild growth through 2008.

The growth in the economy has extended to smaller firms in manufacturing. In the other durables sector, Mutual Materials Inc. will open a new brick manufacturing plant in December and employ 50 workers at this Gresham facility. Micro Power of Beaverton has moved to a larger facility and will add 40 positions by the end of the year. The other non-durable sector of manufacturing news is dominated by ethanol production plants. The locations with the most

promise appear to be Clatskanie, Port of Vancouver, Boardman, and Stanfield. Also in this sector, IMEX America will expand its toner for printer cartridges plant in Salem and add 21 workers. As the economy slows into 2007, this sector will see slower but still positive growth. Employment in food processing is forecast to have a strong 2006 with growth of 6.6 percent. Job declines are projected at 1.0 percent for 2007 followed by job increases of 0.9 percent in 2008. This industry continues to face increased competition and consolidation. In Salem, Truitt Bros. is expanding their west side plant while Trans-Ocean Products will lay off 38 workers by the end of July. The rising cost of inputs such as energy, fertilizer and labor continue to add production costs. Recovering global markets and a declining U.S. dollar should assist this industry.

Construction employment is projected to increase by 9.7 percent in 2006, decline by 1.0 percent in 2007, and increase by 0.8 percent in 2008. Mortgage rates have finally moved up, with rates for 30-year conventional mortgages more than a full percentage point above year ago levels. The U.S. Census reports that year-to-date June 2006 single unit housing starts are down 8.3 percent compared to the similar period a year ago. The strong 2006 job numbers are due to the extraordinary growth of 21.0 percent in the first quarter of this year. The outlook is for continued slowing in 2006 and into 2007. While the single-family residential market is cooling off, demand has picked up in the office space and industrial markets. In the Portland metro, Grubb & Ellis report vacancy rates continue to drop for office space. The industrial market vacancy rates are down by over two percent compared to two years ago with new construction deliveries on the way. Tempering this strong demand is high construction costs which are starting to push up rents. Continued public work projects, such as the Oregon Department of Transportation's extensive bridge and road work, will help counter the dampening impact on jobs from the softening housing market. The strong growth experienced in this sector since mid-2003 is coming to an end.

Service-Producing Sectors

Trade, transportation, and utilities sector employment will increase by 2.8 percent in 2006 followed by 1.4 percent in 2007, and 1.7 percent in 2008. Portland International Airport reports passenger traffic was up 3.9 percent year-to-date through June 2006. The Port of Portland added a third container service company with the arrival of Zim Integrated Shipping Services Ltd. With high snow packs allowing for good water flows and better markets for selling surplus power, Bonneville Power plans to lower wholesale electricity rates by 3.0 percent for 2007. Wind farms generally have low employment associated with their operation to provide electricity, but the number of farms being built or planned is impressive. Areas near the Columbia River, mainly Sherman and Gilliam counties, will see a number of wind farms if plans are carried through.

The retail sector is still in an expansionary period but the pace is beginning to slow. There are still reports of Big-box retailers that are under construction, such as the Home Depot store in Corvallis that will employ 150 full- and part-time workers by this January. Expansions are still underway at Clackamas Town Center. The retail sector is projected to increase jobs by 3.5 percent in 2006 followed by slower growth of 1.4 percent in 2007 and 1.9 percent in 2008.

The information sector, which includes traditional publishers such as newspapers and publishers of software, has been adding jobs since the first half of 2005. Job growth should come in at 1.5 percent for 2006 followed by growth of 1.9 percent in 2007 and 0.2 percent in 2008. This sector has recently received both good and bad news. Laika Entertainment plans to build a 30-acre campus in Tualatin and add 400 people in the next two years. Qwest Communications International Inc. will close its downtown Portland call center, eliminating 175 jobs in October.

Long term interest rates are higher now than a year ago. Housing inventory is rising slightly and sales of existing homes (includes single-family, apartment condos, and co-ops) in Oregon are down 12.0 percent for the second quarter of 2006 compared to a year ago (National Association of Realtors). Median prices of homes are still rising but the pace is starting to slow, with expectations of declines in select parts of the state (possible price declines for previous strong price appreciation areas such as Bend, Medford, and along the coast).

The slowing housing market will also slow the real estate employment sector and the financial connections through mortgage originations and refinancing. Clear Choice Health Plans will build a new building in Bend and add 45 employees. Also in the insurance area, Country Insurance will add a call center to its Salem offices and could add 30 jobs. Netflix, an online DVD rental company, is moving its call center out of the Bay area to Hillsboro, adding about 100 workers over the next few months. Annual employment in the financial activities sector is expected to grow 4.4 percent in 2006 and then milder job growth of 0.7 percent in 2007 and 1.0 percent in 2008.

Professional and business services will finish 2006 with an average growth of 4.9 percent. Job growth is projected at 3.5 percent in 2007 and 3.8 percent in 2008. This sector has been one of the fastest growing job areas since mid-2003. Molecular Probes in Eugene, a biotech firm, is expanding facilities and expects to add 15 to 20 people by the end of the year. Associated Business Systems of Tigard, will create a new division and hire 80 to 100 new employees over the next year.

Education and health services will grow 4.0 percent in 2006, 1.8 percent in 2007, and 2.3 percent in 2008. Health services have been one of the few industries to add jobs through the recession. Along with several hospitals being built, a number of smaller health facilities are joining their ranks.

Leisure and hospitality is projected to grow 3.4 percent in 2006, 1.8 percent in 2007, and 2.0 percent in 2008. Although geopolitical concerns and high gasoline prices may dampen tourism, the evidence points to only a mild impact on the tourism in the first half of 2006. New resorts, hotels, and restaurants continue to open in established tourism sectors in the state. Escape Lodging Co. plans to build a resort in Cascade Locks. In Bend, the opening of Greg's Grill will employ 130 people.

The Government sector is expected to mildly increase 0.2 percent in 2006 then grow by 1.1 percent in 2007 and 2008. The Oregon Employment Department will be closing nine field offices with an unknown number of attritions and/or layoffs. The improving economy has helped local government tax receipts to improve. La Grande, Oregon Trail in Sandy, and Forest

Grove plan to add more teachers. Cuts in special education programs will result in layoffs at Willamette Education Service District in Salem and Portland Public Schools.

Alternative Scenarios

The baseline forecast is our projection of the most likely outcome for the Oregon economy. As with any forecast, other scenarios are possible. The economy could either under or over perform relative to our baseline forecast. We broadly call these forecasts the Optimistic and Pessimistic scenarios. While we attach the highest probability to the baseline forecast, these other outcomes are within the realm of possibilities.

The outlook for the U.S. economy has a direct influence on the outlook for the Oregon economy. Global Insight provides alternative forecasts to their baseline forecast that we label "Optimistic" and "Pessimistic". Essentially, the optimistic forecast has stronger growth in the next few years while the pessimistic forecast has weaker growth for the same period. The Governor's Oregon Council of Economic Advisors (OCEA) meets with OEA to discuss the outlook for the U.S. economy. Members were asked to compare their outlook with that of forecaster Global Insight, whose forecast forms the basis for OEA's Oregon economic model. Table O.5 compares the probability of occurrence for alternative forecasts.

OCEA believes the Baseline Scenario has a greater chance of occurrence, with dramatic deviations more likely on the Pessimistic Scenario compared to the Optimistic Scenario. This heightened view of risks in the next few years is reflected in OEA's forecast for the Oregon economy.

Table O. 5

Alternative Scenarios for Oregon Total Employment and Personal Income									
		Baseline	Compared to Baseline				Growth Rates		
			Pessimistic	Losses	Optimistic	Gains	Baseline	Pessimistic	Optimistic
Total Employment (thousands)	2006	1711.9	1698.3	-13.7	1717.7	5.8	3.2%	2.4%	3.6%
	2007	1733.3	1702.3	-31.1	1753.5	20.1	1.3%	0.2%	2.1%
	2008	1760.7	1719.4	-41.3	1788.8	28.1	1.6%	1.0%	2.0%
Personal Income (\$ billions)	2006	123.3	122.3	-1.0	124.1	0.7	5.9%	5.0%	6.5%
	2007	130.3	127.2	-3.2	132.6	2.3	5.7%	4.0%	6.9%
	2008	137.9	134.0	-3.8	140.8	2.9	5.8%	5.4%	6.2%

Table O. 6

Alternative Scenarios U.S. Outlook				
Forecaster	Optimistic	Baseline	Pessimistic	Recession
Global Insight	20 %	55%	25%	0%
OEA	10%	52%	27%	11%

Table O.6 compares the alternative scenarios for the Oregon economy and Figure O.2 shows the three scenarios for total employment, personal income, manufacturing employment and private non-manufacturing employment.

The alternative scenarios set boundaries around our baseline forecast that incorporate the risk assessment for the national economy by OEA. The boundaries are constructed to reflect Global Insight and OEA's views that the risks are not symmetrical and that they are relative higher in the low (pessimistic) than the high (optimistic) scenarios¹.

The alternative scenarios for the national economy and their possible impact on Oregon are described below:

Optimistic Scenario: The national economy performs better than anticipated. Seven areas are responsible for the stronger growth: Productivity strength, high foreign economic growth, a stronger dollar, stronger business investment, lower federal budget deficit, stronger housing starts, and a lower price for oil. Productivity strength is helped along through continued growth of business spending on information technology and other capital upgrading. Businesses are in a better position to still reap profits without having to appreciatively raise prices. Along with an abatement of rising oil prices, inflation stays in check allowing the Federal Reserve to ease off the raising of interest rates. The stronger dollar also helps on the inflation front by keeping import prices relatively low and constrains businesses in the U.S. from raising prices.

World economies grow faster than anticipated and boost stronger exports even in the face of a stronger dollar. Relatively lower interest rates with a stronger economy keeps construction activity higher. These national trends are especially beneficial to growth in the Oregon economy. Manufacturing employment increases more rapidly compared to the baseline forecast. The non-manufacturing sector is pulled along with the expanding economy. The impact builds into 2006. The Oregon economy continues with stronger growth until the end of 2006 and settles into a sustained growth period into 2007 and 2008, which is still higher than the baseline projection.

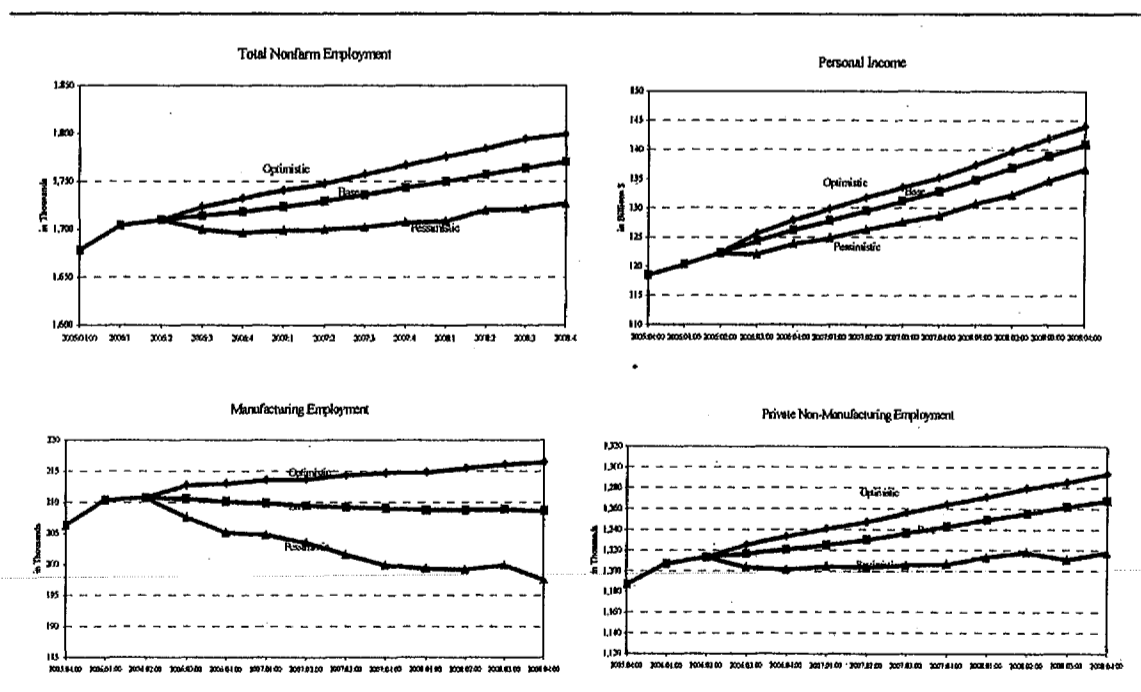
¹ The model is subjected to random errors using "stochastic" techniques. From this stochastic simulation, the resulting residuals of the model are matched to these random errors and constrained to fall within certain confidence levels. To reflect the greater risk associated with the Pessimistic scenario, OEA sets a "confidence" band of 98.0 percent, meaning that "pessimistic" (lower) outcomes occur only 2.0 percent of the time, a more stringent criteria. OEA sets a 90.0 percent "confidence" interval for the Optimistic scenario, implying that "optimistic" (higher) outcomes occur only 10 percent of the time, a less stringent criteria. The higher probability for the Pessimistic scenario (98.0 percent) allows for an outcome to deviate further from the baseline forecast than an outcome from the Optimistic scenario (90.0 percent).

Pessimistic Scenario: The national economy underperforms compared to the baseline forecast. The main culprit is accelerating inflation. At the root of the inflation is high demand for raw materials, doubling of oil prices, weak domestic capacity expansion, and continued fall in the dollar. Production capacity is tighter than measured and continued advances in technology make current idle capacity obsolete. Pressure is placed on prices to rise. Couple this situation with oil prices rising faster than baseline and a weaker dollar, inflation and interest rates rise sooner and faster than the baseline scenario.

The Federal Reserve moves to fight inflation and raise interest rates. At the same time, the housing market experiences a more severe correction with prices falling more than 20 percent by late 2007 and larger drops in housing starts and related residential consumption (construction, building materials, home furnishings, etc.). With foreign demand weaker, exports are also softer. Businesses react by slowing investments and consumers pull back spending. Both profits and the stock market soften in late 2006 and further in 2007. Oregon businesses follow suit and slow down hiring to reflect the slower economic activity. The scenario does not result in a recession. The expansion underway is put on hold through 2008. As Federal Reserve policies take hold in 2007, inflation should start to lessen and the economy marginally improves in late 2007 and early 2008.

The September 2006 forecast for the next few years is a balanced look at prospects for the future. It is our "base scenario" or most likely outcome of the future. Nevertheless, risk factors can push economic activity stronger or weaker. At this point, OEA deems that the risks are not balanced; they are tilted toward more downside than upside, at least in the near term. In other words, risks are biased toward a milder growth scenario compared to our baseline forecast. The risks, of course, could change going forward as conditions change and certain risk factors would have been resolved, becoming part of the baseline assumptions.

Figure O. 2



Forecast Risks

When a person is weak or is in a state of malnutrition, they are more susceptible to getting viruses and suffering from other diseases. With the national economy expected to slow down in the latter part of this year and into 2007, the risks are greater from any disturbances that could throw the economy off track. The same two major drags on the economy that is responsible for the slowdown, oil prices and a slowing housing market could hurt the economy further when it is most susceptible. Any geopolitical disruptions during this time would be more harmful than when the economy is stronger.

The housing market in Oregon shows all signs of slowing with building inventories, declines in sales of new and existing homes, and lower building permits. The last item to join this group is price. So far, house price appreciation has continued but at a slightly slower pace. The expectation is for house prices to drift to single digit increases and decline in some markets.

Oil prices continue to be bounced around by geopolitical events, the most recent being the Israeli-Hezbollah conflict. Refineries in the Gulf region are almost completely back to capacity operation and have helped mute some of the recent oil price increases from translating to much higher prices at the gas pump. But hurricane season is rapidly coming up and the risk of a repeat of last year is still in our memories. (For a more thorough review of oil market risk to the economy, please see this section in the June 2006 Economic and Revenue Forecast publication – “Economic Impact from Oil Prices”.)

We will continue to monitor and recognize the potential disruptions of these two risks factors on the Oregon economy.

The major risks now facing the Oregon economy are:

- Geopolitical risks. Uncertainty still surrounds the transition in Iraq, tensions with North Korea, Iran, Israel and Lebanon, and heightened security risks all weigh heavily on businesses and consumers. Disruptions in travel, oil supplies, and consumer confidence could be severe. The drop in business activity could be deeper if this uncertainty persists or if the transition out of war goes badly for the U.S. The winding down of military expenses will not greatly impact Oregon. There is also an upside risk that transition issues go more smoothly than anticipated and stability in the Mid East provide a stimulus to the economy that is stronger than forecast.
- Inflation and Federal Reserve Bank reactions. A growing economy with surging energy costs is a recipe for inflation. Faster inflation than forecasted may force the Federal Reserve to raise interest rates more quickly and to higher levels. This action could slow the U.S. economy and in turn slowdown the Oregon economy.
- Falling U.S. Dollar. As the dollar depreciates against other foreign currencies, U.S. exports are promoted. Oregon's manufacturing sector has a large dependency on international markets. If the U.S. dollar falls too quickly, this could harm Oregon's trading partners, weakening their economies and lowering their demand for Oregon products. For the

moment, the dollar has crept up against other currencies and the revaluation of the Yuan may be too small to greatly assist Oregon exports. In the end, a controlled lowering of the U.S. dollar is most beneficial to the Oregon economy.

- A sharp and major stock market correction. This would slow consumer spending. Lower stock prices could also limit the ability of businesses to raise necessary capital in the equity markets.
- A possible collapse of the housing market. The extremely low interest rates have caused a boom in home refinancing. As this activity matures and interest rates begin to raise, the added boost to consumer spending may also slow. Any drop in home price appreciations coupled with a large drop in mortgage refinancing could slow down consumer spending. The Oregon housing market could be adversely impacted by a major housing correction in California. Continued gains in personal income will be needed to keep consumer spending from falling.
- Rising regional energy prices. More businesses may slow production and lay off workers. Natural gas prices have risen the past year but appear to be leveling off, at least for this year. Oil prices have crossed above \$70 per barrel with fears it could go higher. A Goldman Sachs report suggests the possibility of a 'super-spike', sending the price of oil over \$100 per barrel. A geopolitical incident could dramatically disrupt gasoline and natural gas prices, with the Goldman Sachs report a more probable outcome. Regionally, electricity generation has been helped by a deeper snow pack but is still subject to weather patterns and natural gas prices. As demand surpasses the available capacity of hydro generation, electric generation may move towards natural gas powered turbine engines. Higher electricity prices could result from being pegged to natural gas prices.
- Avian flu. The possibility of a pandemic would be disruptive on the Oregon economy. Besides higher mortality rates than compared to other influenza outbreaks, absenteeism at work could be 20 to 30 percent. Past pandemics (such as the Spanish flu of 1918) erupt quickly and work through the population within 8 weeks.
- PERS and possible state and local government budget shortfalls. The Oregon Supreme Court overturned two major reforms but upheld the Settlement Agreement. The Court did not rule out future Legislative reforms to PERS. Although the 2005-2007 biennium appears to need only small additional expenditures, state and local governments may need to increase taxes, reduce services, and/or increase bond financing in the future to cover potential unfunded liabilities for PERS. If increases in unfunded liabilities leads to increased tax rates, this could lead to a substantial negative impact on Oregon's economy. To the extent that spending cutbacks hit education and public infrastructure, the state could suffer longer-term impacts.
- Initiatives, referendums, and referrals. The ballot box brings a number of unknowns that could have wide-sweeping impacts on the Oregon economy. The Oregon Supreme Court has upheld the land use Measure 37. This measure could bring dramatic changes to land use

regulation. Claims that were on hold will start moving through the hearing process. At this time, it is uncertain as to the impacts from compensation or lifting of land use restrictions.

- The recovery for semiconductors, software, and communications could be much slower than anticipated. Continued outsourcing of manufacturing could slow growth in this region. Recent commitments to move research out of the country would be very harmful to Oregon's high technology sector.

The major upside opportunities now facing the Oregon economy are:

- Sharp reduction of oil prices. Oil prices are being pushed above market equilibriums by disruptions stemming from political turmoil to extreme weather. Once these factors settle down and supplies increase, oil prices could fall much further than currently anticipated.
- Recovering business and consumer confidence. The transition out of the war in Iraq could accelerate. Rising confidence can help boost spending and hiring. Spillover effects to the stock market would reinforce the economic recovery.
- Controlled growth of China and India. China and India may successfully manage their economies to be more stable and still strong. This should stabilize commodity price volatility while promoting Oregon exports.

Extended Outlook

The Oregon economy grew slower than the U.S. economy in 1998 through 2003. This had not occurred since 1985. Between 2006 and 2013, the U.S. economy is expected to have even slower growth than the slow growth expected in Oregon. Employment growth in Oregon will be slower than the mid-1990s.

The slower economic growth of 1998 through 2003 also slowed the growth of Oregon per capita income and average wages. The devastating 1980-82 recession slowed the growth of incomes and wages until 1986. As the Oregon economy became more industrially diversified, per capita income and wages grew faster than the nation as a whole. Even though the Oregon economy is projected to grow faster than the nation after 2005, per capita income and average wages are not expected to keep up with the national average. Although the recent period of prosperity has raised these two measures, they have yet to reach their previous peaks of 1978.

The key factors that will fuel the state's long-term growth are:

- Recovery in the semiconductor industry: Increasing demand for computers and communications equipment, and a related increase in orders, will bring some relief to the excess capacity in the industry. The needs of the Internet should fuel greater demand. The strength in the industry will allow previously announced investment plans by major companies to be carried out in the 2006-2008 period.

- **Export growth and rising commodity prices:** Global recovery of economies will increase demand for Oregon commodities, finished and capital goods. Oregon is well positioned for trade with Asian countries. Rising commodity prices will benefit agricultural and timber producers in the state.
- **Rising Federal Deficit and Outstanding Debt:** Tax breaks to help the economy out of recession, defense spending, relief spending with hurricanes Katrina and Rita, and the under funded outlook for health care and social security, have created an imbalance between spending and tax revenues, creating a possible higher inflation environment with higher interest rates. Corrections of this imbalance include reduced federal services and/or higher taxes. This dampening effect on the national economy would in turn dampen the Oregon economy.
- **Continued strength in domestic markets:** Continued economic growth in California and other major domestic markets will fuel demand for Oregon products.
- **Business costs advantages:** The Oregon economy will benefit from a comprehensive energy plan. Efforts which have long been in place for electricity planning should extend to all energy sources. If the plan can assure businesses of an abundant, reliable, and relatively inexpensive supply of electricity and other sources of energy, the state (and Pacific Northwest) will continue to have a relative energy advantage over other regions. If recent price hikes for electricity and natural gas surpass those for other parts of the country, Oregon could lose this cost advantage. Oregon has other business cost advantages, such as lower workers' compensation rates and multi-modal transportation options compared to other states. Equally important is an educated work force that contributes to productivity.
- **Environmental issues:** Salmon protection measures, Portland Super Fund, and other issues could change the economic landscape.
- **Affordable housing:** If housing costs rise faster in Oregon than in the rest of the nation, companies will face increased difficulties recruiting workers. Over the last five years, California, Washington, and the nation as a whole when compared to Oregon have experienced faster rising housing costs. If Oregon can maintain a relative cost advantage in housing, this factor will be attractive for firm location.
- **Biotechnology and Nanotechnology:** These sectors are seen by many as the next growth industries. Portland and the state have launched funding plans to promote the biotechnology sector. The platform for the Oregon Business Plan includes nanotechnology as an emerging field for the state. It is too early to tell if these are the next growth industries and the returns that they may bring.
- **Sustainable development:** Centered in the Portland area, this movement in the building practices is spreading throughout the U.S. Uncertainty surrounds the number of new jobs associated with this movement, but it may allow gains in market share for construction and consulting firms in Oregon.

- Quality of life: Oregon will continue to attract financially secure retirees. Companies that place a high premium on quality of life will desire to locate in Oregon.

Oregon Index of Leading Economic Indicators (OILI)

Since November 2003, the Oregon Economic and Revenue Forecast report has included analysis based on the Oregon Index of Leading Economic Indicators (OILI). The OILI applies the Conference Board's methodology for the U.S. National Leading Index to Oregon-specific components². OEA anticipates potential changes in these index components over time as Oregon's economy evolves and new and better predictors of economic activity emerge. While it does not measure the magnitude of this economic activity, the Index can identify the direction of future trends. The OILI is therefore a useful supplement to Oregon's economic forecast.

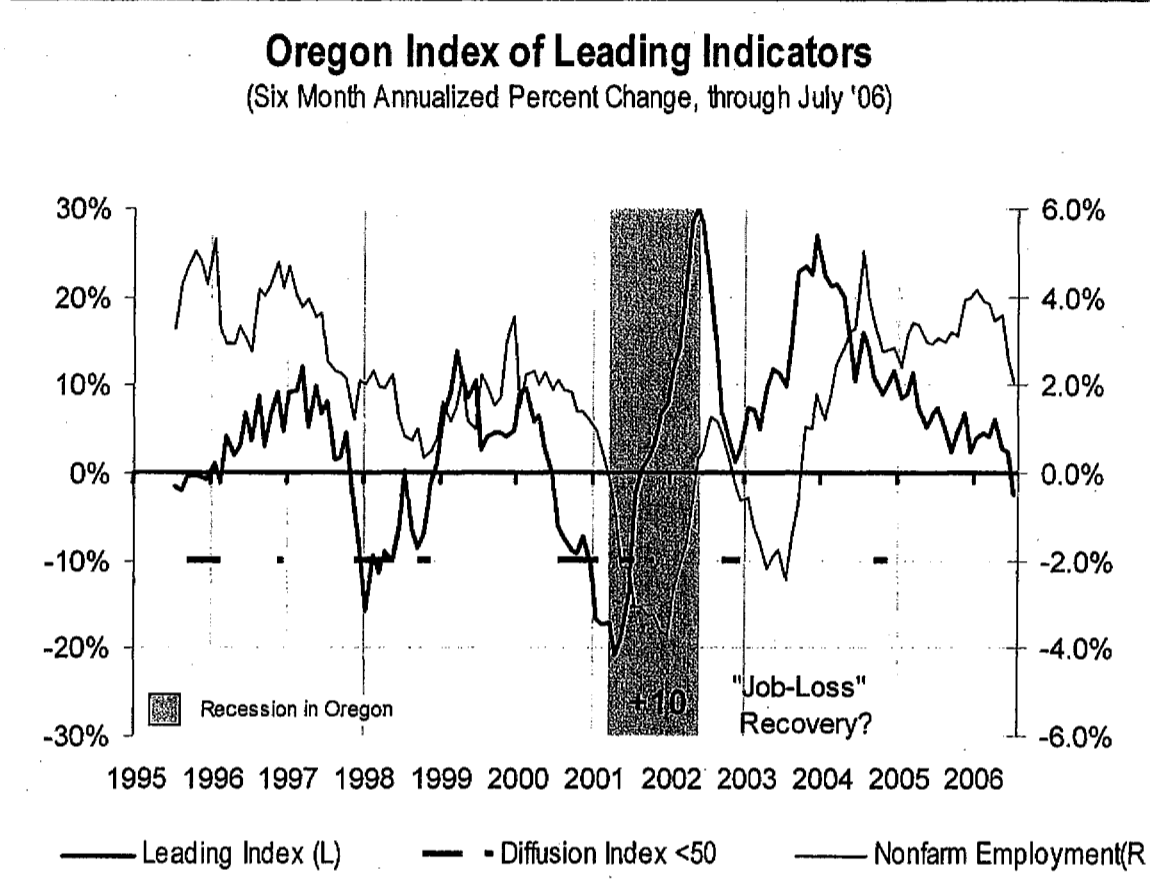
The OILI contains ten components related to business decisions and conditions that tend to trigger an expansion or contraction: 1) national Semiconductor Book-to-Bill Ratio, 2) Oregon residential building permits, 3) Institute for Supply Management's (ISM) national index, 4) interest rate spread (10-year treasury bond less Federal Funds Rate), 5) the University of Michigan (UM) Consumer Sentiment Index, 6) total withholding for Oregon employees, 7) the Federal Reserve Bank of Atlanta Dollar Index (Pacific Excluding Japan), 8) Oregon new business incorporations, 9) Oregonian help wanted index and 10) Oregon unemployment initial claims.

The OILI uses component data from January 1995 to July 2006, and Oregon nonfarm employment data for the same period is used as a proxy for general economic activity. According to the nonfarm data, the Oregon economy experienced two downturns over the index period: one occurred from mid-2001 to mid-2002, and the second occurred in late 2002 and continued through the end of June 2003. While a "double-dip" recession has not been officially recognized, the second period of Oregon employment contraction late in 2002 is consistent with the jobless recovery observed nationally.

Measured against these employment trends, OILI provides four signals in all: OILI signals the first Oregon recession with a considerable ten-month lead and gives a three-month leading signal on the second recession. The remaining two signals, one in 1995 and a second in 1998, give false indications of economic change that possibly reflect an unusual influence on individual components. The 1995 signal, for example, occurs at the start of the data set where outlying numbers are likely, and the 1998 signal roughly corresponds with the Asian Financial Crisis, not altogether an unexpected error given Oregon's ties to eastern trading partners.

² In 2005, the Conference Board changed the yield curve component from the one-month change in the spread to the spread itself. As a result, the yield curve component provides a negative signal only when the yield curve inverts, an occurrence that historically leads a recession. As of April 2006, the Oregon Leading Index is modified to include the spread as well.

Figure O. 3



For the six months ending in July 2006, the Oregon Index of Leading Indicators³ declined an annualized 2.4 percent, following a revised 2.5 percent rise in June. This marks the first decline in the index since July 2001. Annualized employment growth of 2.1 percent for the six months through July followed a revised 2.6 percent increase in the prior month.

Housing permits, consumer sentiment, and help wanted ads were the primary contributors to the index's decline. Withholding and new incorporations also exhibited negative growth for the six-month period ending in July. Major contrary indicators were the book-to-bill ratio, dollar, and the yield curve.

³ The OILI applies the Conference Board's methodology for the U.S. National Leading Index to Oregon-specific components. The ten components incorporated in the OILI include: Institute for Supply Management's purchasing managers index, spread between 10-year treasury bond and Federal Funds rates, University of Michigan consumer sentiment index, Oregon withholding, Federal Reserve Bank of Atlanta Dollar index (Pacific excluding Japan), new Oregon incorporations, Oregonian help-wanted index, and initial Oregon unemployment claims.

Oregon Regional Profile

The accompanied tables provide data on regional and county levels within the state. This section will be a regular feature following the Oregon Economic Review and Forecast. The tables (Table O.7 through O.10) highlight the social, economic, and demographic diversity in the state. Please review these tables in each quarterly issue as data is updated and new information is displayed.

Table O. 7

Geography	2005	2005	2004	2005
	Total Employment	Unemployment Rate	Per capita personal income	Average wage per job
OREGON	1,745,811	6.1%	\$30,561	\$35,621
Portland 5-County	841,393	5.7%	\$34,783	\$41,718
Clackamas	180,561	5.4%	\$37,094	\$37,779
Columbia	21,418	7.3%	\$27,745	\$31,956
Multnomah	344,576	6.2%	\$36,117	\$41,243
Washington	253,358	5.2%	\$33,347	\$46,784
Yamhill	41,480	6.1%	\$27,030	\$31,397
Willamette Valley	425,674	6.2%	\$27,700	\$32,497
Benton	40,138	4.8%	\$33,988	\$39,279
Lane	163,668	6.1%	\$27,788	\$32,302
Linn	48,609	7.4%	\$25,091	\$31,905
Marion	140,181	6.4%	\$27,128	\$31,821
Polk	33,078	5.5%	\$26,671	\$27,141
Coast	86,587	6.6%	\$26,789	\$27,421
Clatsop	17,945	5.7%	\$27,940	\$28,320
Coos	27,099	7.3%	\$26,031	\$27,420
Curry	9,064	6.5%	\$25,084	\$25,953
Lincoln	20,857	6.7%	\$27,605	\$26,814
Tillamook	11,622	6.0%	\$27,089	\$28,181
Southern	169,784	6.7%	\$26,637	\$30,098
Douglas	43,565	8.1%	\$25,623	\$30,759
Jackson	93,598	6.0%	\$28,531	\$30,502
Josephine	32,621	6.9%	\$23,367	\$27,708
Central	144,542	6.3%	\$26,837	\$29,830
Crook	8,684	6.7%	\$22,719	\$31,666
Deschutes	70,234	5.5%	\$29,853	\$31,482
Gilliam	957	5.8%	\$25,242	\$27,818
Hood River	11,500	6.4%	\$25,237	\$23,976
Jefferson	8,533	6.1%	\$22,735	\$28,412
Klamath	27,986	7.6%	\$24,917	\$29,797
Lake	3,301	8.5%	\$24,271	\$27,677
Sherman	828	7.2%	\$23,599	\$29,232
Wasco	11,894	7.1%	\$24,958	\$26,706
Wheeler	625	6.4%	\$22,832	\$23,294
Eastern	77,838	8.0%	\$24,099	\$28,291
Baker	6,625	7.5%	\$22,331	\$27,012
Grant	3,304	9.9%	\$26,163	\$27,151
Harney	3,141	9.1%	\$24,293	\$27,286
Malheur	11,729	8.8%	\$20,222	\$25,929
Morrow	5,122	7.5%	\$27,901	\$30,804
Umatilla	33,638	7.9%	\$24,484	\$29,667
Union	10,998	6.9%	\$26,179	\$28,350
Wallowa	3,281	7.6%	\$25,574	\$24,852

Sources: Total employment and unemployment rate: Oregon Employment Department;
per capita personal income: U.S. Bureau of Economic Analysis;
average wage per job: Oregon Employment Department.

Table O. 8

Oregon's Gross Farm & Ranch Sales By County and Region for 2004 and 2005

STATE/COUNTY	Year 2005			Year 2004			Change in total sales from 04 to 05
	All Crops	All Animal Products	Total Sales	All Crops	All Animal Products	Total Sales	
OREGON	2,915,305	1,149,163	4,064,468	2,775,316	1,081,080	3,856,396	5.4%
Portland PMSA	901,044	110,511	1,011,555	861,271	105,464	966,735	4.6%
Clackamas	312,329	49,589	361,918	308,280	47,076	355,356	1.8%
Columbia	28,749	4,221	32,970	26,809	4,005	30,814	7.0%
Multnomah	75,125	2,619	77,744	73,408	2,464	75,872	2.5%
Washington	257,626	17,259	274,885	244,458	17,573	262,031	4.9%
Yamhill	227,215	36,823	264,038	208,316	34,346	242,662	8.8%
Willamette Valley	910,198	230,912	1,141,110	893,932	214,824	1,108,756	2.9%
Benton	91,407	13,971	105,378	94,834	13,811	108,645	3.0%
Lane	89,624	27,615	117,239	87,165	27,531	114,696	2.2%
Linn	200,101	48,711	248,812	196,584	45,668	242,252	2.7%
Marion	432,725	106,904	539,629	421,787	96,941	518,728	4.0%
Polk	96,341	33,711	130,052	93,562	30,873	124,435	4.5%
Coast	80,428	128,951	209,379	81,177	121,765	202,942	3.2%
Clatsop	5,509	6,580	12,089	7,115	6,333	13,448	10.7%
Coos	31,795	14,051	45,846	32,995	12,944	45,939	0.2%
Curry	22,286	3,412	25,698	21,267	3,183	24,450	5.1%
Lincoln	16,250	1,779	18,029	15,401	1,727	17,128	5.3%
Tillamook	4,588	103,129	107,717	4,399	97,578	101,977	5.6%
Southern	123,478	61,720	185,198	117,204	57,083	174,287	6.3%
Douglas	52,134	24,814	76,948	47,809	23,615	71,424	7.7%
Jackson	52,271	23,970	76,241	54,300	20,771	75,071	1.6%
Josephine	19,073	12,936	32,009	15,095	12,697	27,792	15.2%
Central	348,590	207,175	555,765	342,522	202,980	545,502	1.9%
Crook	14,172	28,452	42,624	13,941	29,082	43,023	0.9%
Deschutes	10,383	12,875	23,258	9,551	15,698	25,249	7.9%
Gilliam	16,818	10,528	27,346	14,714	10,026	24,740	10.5%
Hood River	65,808	1,200	67,008	64,466	1,200	65,666	2.0%
Jefferson	29,152	13,833	42,985	35,580	14,925	50,505	14.9%
Klamath	108,303	92,446	200,749	93,337	89,441	182,778	9.8%
Lake	26,701	28,784	55,485	24,478	28,758	53,236	4.2%
Sherman	23,774	2,286	26,060	22,879	2,085	24,964	4.4%
Wasco	51,795	6,967	58,762	61,890	6,921	68,811	16.5%
Wheeler	1,684	9,804	11,488	1,686	4,844	6,530	75.9%
Eastern	551,567	409,894	961,461	479,210	378,964	858,174	12.0%
Baker	14,756	42,012	56,768	15,625	39,972	55,597	2.1%
Grant	9,490	20,739	30,229	9,406	19,478	28,884	4.7%
Harney	16,562	51,837	68,399	14,348	46,269	60,617	12.8%
Malheur	112,740	93,686	206,426	81,316	90,308	171,624	20.3%
Morrow	118,383	115,013	233,396	111,501	100,964	212,465	9.9%
Umatilla	221,143	53,620	274,763	188,485	48,407	236,892	16.0%
Union	34,309	13,652	47,961	34,585	13,568	48,153	0.1%
Wallowa	24,184	19,335	43,519	23,944	19,998	43,942	0.8%

Source: Oregon State University's Oregon Agricultural Information Network (OAIN),
Extension Economic Information Office.

Table O. 9

Oregon's Public Elementary and Secondary School Enrollment Statistics

STATE/COUNTY	Oct. 1, 2005 enrollment	Oct. 1, 2000 enrollment	2000-2005 % change	2004-2005 per student expenditure(*)	2004-2005 eligible for free lunch
OREGON	559,215	545,680	2.5%	\$7,680	33.4%
Portland PMSA	254,980	245,255	4.0%	\$7,619	29.5%
Clackamas	57,926	54,691	5.9%	\$7,023	20.1%
Columbia	8,703	8,600	1.2%	\$6,844	24.0%
Multnomah	91,569	93,296	-1.9%	\$8,606	40.7%
Washington	80,469	73,195	9.9%	\$7,078	23.6%
Yamhill	16,313	15,473	5.4%	\$7,211	32.0%
Willamette Valley	139,545	134,717	3.6%	\$7,539	35.9%
Benton	9,229	9,996	-7.7%	\$7,481	22.6%
Lane	47,709	48,144	-0.9%	\$7,567	32.8%
Linn	19,163	17,798	7.7%	\$6,984	38.2%
Marion	56,899	52,271	8.9%	\$7,751	40.3%
Polk	6,545	6,508	0.6%	\$7,138	32.8%
Coast	25,765	28,293	-8.9%	\$8,061	39.6%
Clatsop	5,162	5,555	-7.1%	\$7,797	27.4%
Coos	8,531	9,404	-9.3%	\$7,883	41.9%
Curry	2,819	3,072	-8.2%	\$7,996	37.9%
Lincoln	5,831	6,496	-10.2%	\$8,426	48.9%
Tillamook	3,422	3,766	-9.1%	\$8,356	38.4%
Southern	56,829	57,338	-0.9%	\$7,214	35.3%
Douglas	16,132	16,646	-3.1%	\$7,462	36.4%
Jackson	29,057	29,188	-0.4%	\$7,035	32.7%
Josephine	11,640	11,504	1.2%	\$7,318	39.9%
Central	49,727	47,645	4.4%	\$7,747	35.0%
Crook	3,295	3,198	3.0%	\$7,377	36.6%
Deschutes	22,668	19,867	14.1%	\$6,767	26.0%
Gilliam	275	353	-22.1%	\$14,670	20.6%
Hood River	4,015	3,777	6.3%	\$8,593	30.1%
Jefferson	3,636	3,722	-2.3%	\$9,684	62.3%
Klamath	10,696	11,048	-3.2%	\$8,277	41.0%
Lake	1,121	1,383	-18.9%	\$8,833	41.7%
Sherman	270	364	-25.8%	\$12,008	35.6%
Wasco	3,531	3,678	-4.0%	\$7,842	48.1%
Wheeler	220	255	-13.7%	\$17,326	42.8%
Eastern	30,801	31,716	-2.9%	\$9,254	43.1%
Baker	2,356	2,826	-16.6%	\$8,837	40.0%
Grant	1,106	1,352	-18.2%	\$10,948	35.1%
Harney	1,225	1,426	-14.1%	\$10,083	39.6%
Malheur	5,358	5,609	-4.5%	\$8,574	54.1%
Morrow	2,367	2,250	5.2%	\$8,736	54.2%
Umatilla	13,419	12,878	4.2%	\$9,856	43.1%
Union	4,063	4,177	-2.7%	\$8,131	30.3%
Wallowa	907	1,198	-24.3%	\$8,562	29.8%

(*) Includes only expenditures by school districts. Excludes expenditures by ESDs and state-run schools.
Source: Oregon Department of Education, Office of Analysis and Reporting

Table O. 10

2005 Annual Average Covered Employment by NAICS Division and by Region

Employment	Region						
	Oregon	Portland 5-County	Willamette Valley	Coast	Southern	Central	Eastern
Natural Resources & Mining	48,858	13,854	15,793	2,910	4,987	5,739	5,464
Construction	89,965	45,953	18,630	3,485	8,863	9,006	2,237
Manufacturing	203,328	108,996	48,863	6,958	16,304	13,525	8,599
Trade, Transportation, & Utilities	325,145	172,751	64,456	13,461	31,903	23,830	13,395
Information	33,583	20,024	6,289	846	2,519	2,258	750
Financial Activities	87,562	54,534	16,074	2,483	6,141	5,221	2,055
Professional & Business Services	186,437	114,659	34,881	5,371	12,169	10,303	3,614
Education & Health Services	192,914	99,103	45,820	6,738	19,459	14,328	6,420
Leisure & Hospitality	158,872	77,365	32,072	12,562	15,161	15,567	5,394
Other Services	60,329	31,772	13,396	2,608	5,307	3,904	1,878
Government	265,222	109,044	77,621	15,850	23,165	21,472	18,005
Total	1,652,874	848,350	373,988	73,303	146,010	125,195	67,815

Distribution	Region						
	Oregon	Portland PMSA	Willamette Valley	Coastal	Southern	Central	Eastern
Natural Resources & Mining	3.0%	1.6%	4.2%	4.0%	3.4%	4.6%	8.1%
Construction	5.4%	5.4%	5.0%	4.8%	6.1%	7.2%	3.3%
Manufacturing	12.3%	12.8%	13.1%	9.5%	11.2%	10.8%	12.7%
Trade, Transportation, & Utilities	19.7%	20.4%	17.2%	18.4%	21.8%	19.0%	19.8%
Information	2.0%	2.4%	1.7%	1.2%	1.7%	1.8%	1.1%
Financial Activities	5.3%	6.4%	4.3%	3.4%	4.2%	4.2%	3.0%
Professional & Business Services	11.3%	13.5%	9.3%	7.3%	8.3%	8.2%	5.3%
Education & Health Services	11.7%	11.7%	12.3%	9.2%	13.3%	11.4%	9.5%
Leisure & Hospitality	9.6%	9.1%	8.6%	17.1%	10.4%	12.4%	8.0%
Other Services	3.6%	3.7%	3.6%	3.6%	3.6%	3.1%	2.8%
Government	16.0%	12.9%	20.8%	21.6%	15.9%	17.2%	26.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Oregon Employment Department

Note: Employment includes only covered employment.

Oregon total includes multi-county employment not shown in individual regions.

Total includes a small number of non-classifiable jobs not shown in individual industries.

Definition of regions:

Portland 5-County: Clackamas, Columbia, Multnomah, Washington, and Yamhill counties.

Willamette Valley: Benton, Lane, Linn, Marion, and Polk counties.

Coast: Clatsop, Coos, Curry, Lincoln, and Tillamook counties.

Southern: Douglas, Jackson, and Josephine counties.

Central: Crook, Deschutes, Gilliam, Hood River, Jefferson, Klamath, Lake, Sherman, Wasco, and Wheeler counties.

Eastern: Baker, Grant, Harney, Malheur, Morrow, Union, Umatilla, and Wallowa counties.



*Regional Profile
Industry Employment
in Region 8*

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REGION 8 INDUSTRY EMPLOYMENT

In our economy, we measure, track and analyze employment data by occupations and industry. We'll focus here on the latter – the industries that comprise the economy of the Rogue Valley (Jackson and Josephine counties). Our most complete source of industry employment data are obtained through employer tax records. All new and existing businesses are assigned a six-digit code that helps us classify types of businesses. This allows us to monitor employment and payroll trends within those industries. Beginning in 2001, all of our industry employment data are published using the North American Industrial Classification System (NAICS). This represents a new industry coding system, the first entirely new way of measuring industry employment in more than 60 years. The economy has changed dramatically over that time, and this new system reflects the reality of our industry mix much better than the Standard Industrial Classification (SIC) system.

However, this change has had some drawbacks. It makes comparing industry trends over time, before 2001, difficult if not impossible. Many industries in the NAICS system did not exist according to the older SIC coding system (management of companies, or leisure and hospitality). Maybe in the 1930s there wasn't any time for leisure, with the depression and the world preparing for another world war. This new industry coding system also was adopted to make comparisons between the United States, Mexico and Canada easier. Our neighbors to the north and south also have adopted the NAICS system to measure industry employment and payroll.

Even with all of the comprehensive data we can analyze through employer tax records, using the "Quarterly Census of Employment and Wages" program, there are some segments of our economy where there are significant gaps in data collection and analysis. Two of those areas are self-employment and the agriculture industry. Our employer tax record data reports workers who are required to be covered by unemployment insurance. Self-employed workers and many agriculture employees are exempt from unemployment insurance coverage. Therefore, monthly and annual average data for these sectors of the economy are estimates based on Census or Current Population Survey information. The best measurement of farm proprietor data is published every five years by the Census of Agriculture. Self-employment numbers are tabulated from the decennial census.

According to the 2000 Census, 15.6 percent of the Jackson County labor force was self-employed in either an incorporated or nonincorporated business. Josephine County had an even higher percentage of self-employed, at 16.9 percent. Unlike our industry employment data from employer payroll records, self-employment data are based on where the population in the labor force lives. Our industry data for covered employment are based on where firms in those industries are located. Another missing piece of the employment puzzle for self-employment data is the type of business where these self-employed work.

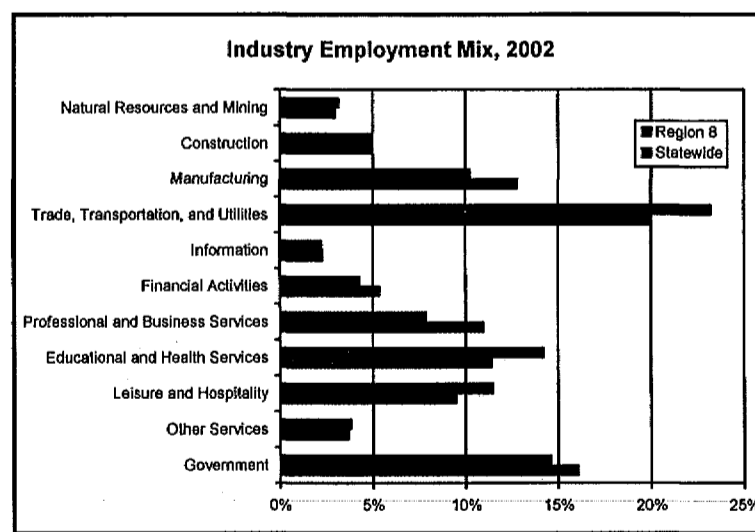
Our agricultural employment estimates show that, in 2003, there were 1,780 employed on an annual average basis in Jackson County. Peak employment months for agriculture are from August through October. These months are when most harvesting in the local fruit tree, mainly pear tree, crops occur. In Josephine County, there were 440 employed on an annual average basis in the agriculture industry. Agriculture and farm sales data from Oregon State University's Agricultural Extension Service show total agricultural sales in 2003 increased by 16.5 percent from the prior year, with sales

totaling over \$94 million in the two-county region. Cattle sales were up 40.9 percent over the prior year. Total livestock sales were up by 20.6 percent, while crop sales increased by 14.2 percent over 2002. While the total acreage in pear production has fallen over the past 20 years, many older trees are being removed, and young trees are being planted in those orchards. Southern Oregon also boasts an increasingly viable wine grape industry. In 2003, that area has been granted its own appellation, an important development in the region's viticulture. Threats to the long-term outlook of the area's agriculture sector include imports of lower cost products from overseas, more stringent pesticide use laws, and irrigation water availability from storage basins in neighboring counties. New efforts have recently begun to link smaller farms to the region's local restaurants. Farmer's markets have sprouted up during the spring and summer months in many local communities, giving growers additional channels of distribution. Data from the 2002 Census of Agriculture, which includes counts of farm proprietors by county, will be released later this year.

Industry Mix

The Rogue Valley economy has been undergoing structural change over the past few decades. Once an agriculture and wood products manufacturing-dominated economy, the economy of today represents a diverse mix of industries that provides goods and services for the local population and brings in dollars from out of the area. The area is increasingly becoming a retail and services hub that serves a population much larger than the 260,000 residents of the two-county region. A recent analysis used a tool called the "Hachman Index" to measure industry diversity among all Oregon counties. Jackson County was rated the seventh most diverse county, while Josephine County ranked as the fifth most diverse county. Jackson County's location on Interstate 5, which borders California, and lacks a sales tax, has created strong growth in wholesale and retail trade. Other Jackson County industries with a higher percentage of employment than statewide include art, entertainment and recreation, health care and social assistance, and accommodations and food services. An aging population, along with a steady stream of near and retirement-age residents from other locations, also has benefited the Rogue Valley's health services and residential care facilities industries.

Josephine County has a higher percentage of employment than Oregon in ambulatory health care services, wood product manufacturing, logging and forestry, furniture and related product manufacturing, general merchandise and food stores, nursing and residential care facilities, and accommodations. In the past year, the construction industry has experienced strong growth in both counties. Building permit data show an increase of more than 25 percent between 2002 and 2003 in the Rogue Valley. Graph 1 compares the percentage of employment by industry between Region 8



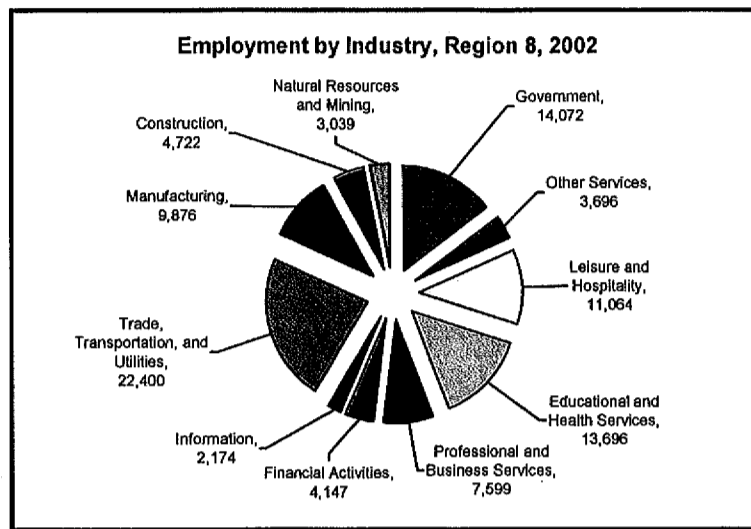
Graph 1

and statewide. Graph 2 shows industry employment numbers for Region 8. While the downturn in the economy between 2001 and 2003 was especially acute statewide, the recession in Southern Oregon was less severe. After experiencing two years of flat or slightly declining job growth in 2001 and 2002, job growth returned to the Rogue Valley in 2003. As Graph 3 shows, the latest downturn was slightly longer than the 1991 recession, but total employment loss was less. Compared with the recession of 1980 through 1982, the recent downturn was much more mild in Southern Oregon. The areas of Oregon, especially the Portland Primary Metropolitan Statistical Area, most affected had become much more reliant on the high-tech manufacturing sector over the past decade. The bursting of the dot-com bubble, along with a steep decline in business investments, were the main culprits in the most recent recession to hit Oregon.

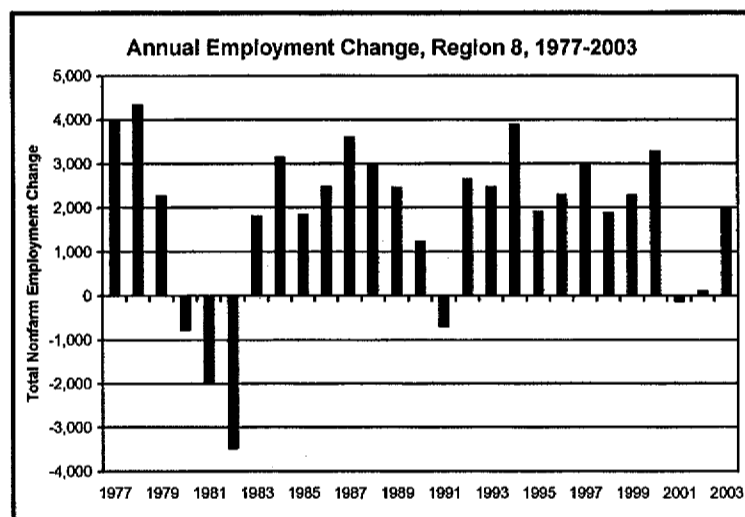
Employment Projections by Industry for Jackson and Josephine Counties: 2002-2012

A bit like a turkey at Thanksgiving, every two years Oregon Employment Department (OED) analysts stick our necks out and make projections of industry growth for the upcoming 10 years. Who would have expected the Rogue Valley to outpace Oregon's job growth over the past decade? We did, with 24 percent for Oregon versus 26 percent in Jackson and Josephine counties. Did anyone anticipate the depth of the recession in the early 1980s that caused the unemployment rate to soar far into double-digit territory in the Rogue Valley? In 1982, the annual average unemployment rate in Josephine County was 15.2 percent, while Jackson County wasn't far behind at 14.4.

Although predicting the future is perhaps best left to psychics, we do our best to come up with estimates of future employment growth trends for the upcoming decade. Remember, nothing in this world is certain except death and taxes. Our latest round of projections covers the period from 2002 through 2012. We don't know for sure that the Rogue Valley will add employment over the next 10



Graph 2



Graph 3

years. But based on history, the region most likely will. The difficult task is estimating how many jobs will be added, and in what industry sectors those jobs will be created.

The latest projections for the Rogue Valley have made headlines. The region is expected to add jobs faster than any region of the state. Jackson and Josephine counties' job growth over that time has been pegged at 15.6 percent, outpacing Oregon's 13.7 percent through 2012 (Figure 1). While that may sound impressive, it is a slower job growth rate than we experienced over the prior 10-year period. Figure 1 shows job growth forecast by workforce region.

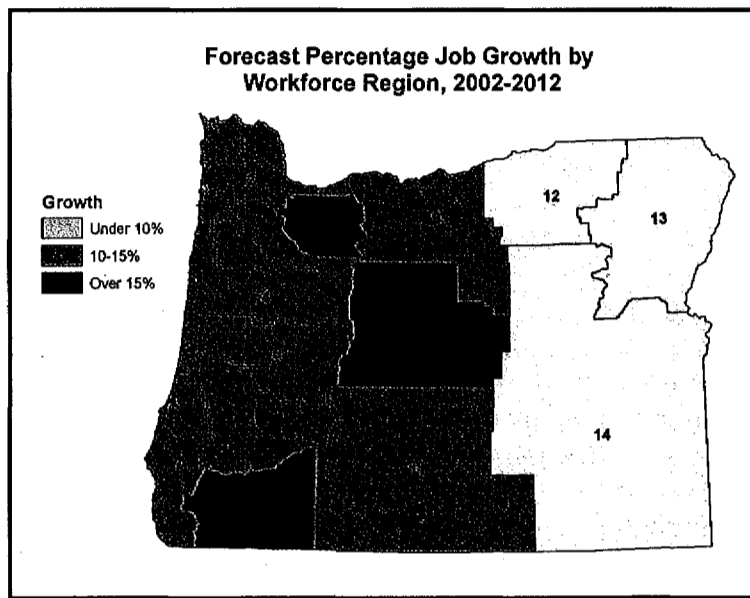


Figure 1

We develop our forecast at the detailed industry level, then sum those – in this case, a three-digit SIC industry forecast – to mostly two-digit published sectors. Why don't we forecast industry growth by the NAICS industry coding system since we now publish current and annual average data by NAICS industry codes? Good question. One reason is that we look at past trends to forecast future job growth. We just don't have reliable, statistically valid historical data by NAICS industry code on which to base our current round of projections. Over the next few years, as true time series data are collected by NAICS code, then we will revise our forecasting methodology to reflect the new industry coding structure.

What drives job increases, and why is overall growth expected to moderate in the coming decade? What about specific industry forecasts?

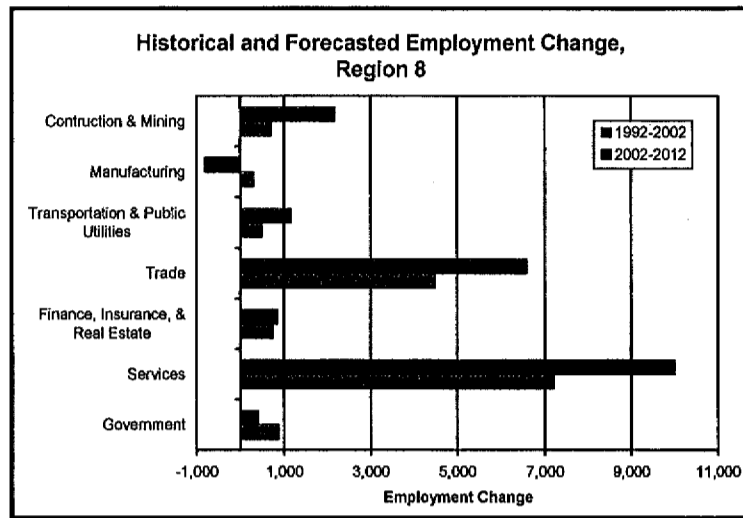
Southern Oregon has been an increasingly popular destination to travel to, retire to and in-migrate to in search of quality-of-life factors. But, as the area grows, some of those quality-of-life factors may become diluted. Air quality may degrade due to increased traffic volume. That traffic volume may lead to congested roadways, longer waits at traffic lights and slower commutes around town. Population growth will strain such local infrastructure as water supplies, water waste treatment, public services, classroom sizes, and potentially, more crime. While population growth typically leads to increased demand for goods and services, and greater employment prospects to meet those demands, it does not come without some challenges.

This area is expected to continue to have strong population growth over the next 10 years, and that growth is largely responsible for the increase in employment in the retail and service sectors of the local economy. The most recent projections by the Oregon Office of Economic Analysis, published in 1997, show that the population of the two-county region of the Rogue Valley would grow by about 12 percent between 2000 and 2010. But a more recent prediction published in the April 2003 issue of

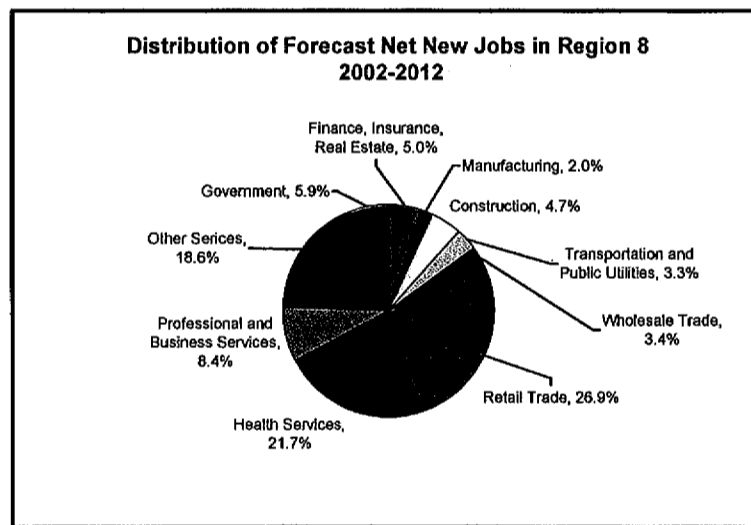
American Demographics picked the Medford-Ashland MSA (Jackson County) as one of 22 of the "magnet markets" in the United States, defined as having a high diversity quotient, or that have a large senior population and are expected to grow the fastest over the next 25 years. The research published in this issue predicts Jackson County's population would increase to 226,198 by 2010, a 10 year growth rate of 24 percent.

Other demographic trends also are expected to boost employment. For example, not only do we expect a growing population, but also one that is aging. This will increase demand for services to meet the needs of those age groups, particularly such health care and social services as assisted living and adult foster care facilities. An aging population also has implications for labor force growth. While population is expected to increase, without a substantial shift in labor force participation rates of older residents, the overall labor force is expected to grow more slowly over the next 10 years.

Next, we will examine in more detail what sectors of the region's economy are expected to add jobs over the next 10 years. Graph 4 shows historical and forecasted employment change by industry for Region 8. Graph 5 looks at the distribution of new jobs by broad industry category.



Graph 4



Graph 5

Services industries are expected to account for about one-half of the Rogue Valley's job growth between 2002 and 2012. Services employment is forecast to grow by 25.7 percent, adding 7,210 new jobs. Health services is expected to be the fastest growing of any sector in the Rogue Valley, increasing by 31.5 percent. To put this into perspective, over the previous decade, the Rogue Valley added more than 10,000 jobs in services, with health services accounting for 3,430 of that increase. Health services employment increased by more than 50 percent over the past decade.

Trade industries are expected to add nearly 4,500 new jobs to the region's employment base over the coming decade, or nearly one in three new jobs. Trade employment is expected to grow slightly

faster than the average for all industries, at 16.1 percent. Trade employment often tracks population growth. Depending on what population forecast you believe, the rate of growth in trade employment may even be faster than our published forecast for this industry. Wholesale trade is more affected by broader industry and economic trends and by the recent slowing of economic growth and the downturn in lumber and wood products industry. As the economy rebounds and the rate of job loss in lumber and wood products slows over the coming decade, wholesale trade employment is forecast to increase by 17 percent over the next 10 years.

Finance, insurance, and real estate industries also are expected to grow along with the region's population. This sector is affected by such economic forces as interest rates and housing markets. Employment in this sector may have more cyclical swings than other components of the Rogue Valley economy. Overall, however, it is expected to add 740 jobs over the coming decade for a growth rate of about 16 percent. Continuing mergers and consolidation in the banking industry, along with more technology-related changes like online banking, raises the risk for slowing job growth in that sector.

Transportation and public utilities are expected to grow more slowly in the coming decade. After surging by more than 30 percent during the past 10 years, employment is expected to climb by nearly 11 percent. Much of the growth in the 1990s was related to call center employment in the telecommunication sector. That activity appears to be leveling off in the Rogue Valley.

Construction and mining was the fastest growing industry segment in the Rogue Valley over the past 10 years, increasing by nearly 80 percent. This industry outpaced even the health services industry, which grew at a strong 51 percent in this region. In the coming 10 years, this sector is expected to grow more slowly, up by about 15 percent and adding about 700 new jobs. This projection may be a little conservative if more robust population growth forecasts hold true. Increase in this sector has been fueled by rapid population growth, a robust economy and low interest rates over the past few years. The construction industry tends to be cyclical, but low interest rates have helped bolster job counts despite slowing in many other industries.

Manufacturing employment fell by 9 percent over the past 10 years in the Rogue Valley. The biggest drag on overall manufacturing employment was a loss of nearly 2,000 jobs in the lumber and wood products industries. However, other durable goods manufacturing added more than 650 new jobs over the decade, and nondurable goods employment rose by nearly 200. The lack of high-tech-related manufacturing has been a mixed blessing for this region. We did not experience the rapid job growth that occurred in the northern half of Oregon during the 1990s, and the associated gains in average wages or property and other taxes paid to those counties. During the latest recession, we did not have those jobs to lose, so we looked comparatively better in some statistics than the Portland metro area. We also have had less reliance on such manufacturing industries as primary metals manufacturing and transportation equipment manufacturing.

We have a fairly diverse and resilient manufacturing mix in this area. We forecast that manufacturing will grow about 3 percent over the next 10 years, despite a reduction of 13.1 percent in lumber and wood products employment. Many factors will impact these trends; there is no clear outcome. Will logging increase on state and national forests as a result of the health forest initiative currently being debated in Congress? Will our region benefit from possible salvage logging of the Biscuit Fire? Will

Canadian and other imports continue to depress lumber prices and demand for locally produced lumber? There are so many unknowns that making these estimates is perilous.

Other durable goods employment is forecast to grow by about 20 percent, adding 750 new jobs to the Rogue Valley economy over the next 10 years. Key ingredients will help sustain local manufacturing employment (Table 1). These include the area's availability of industrial sites; small manufacturers that can react nimbly to changing products, technologies, and markets; a community college that is embarking on a technology center to provide manufacturing-related training programs; an airport that is planning for further expansion; and our nearly equidistant location on Interstate 5 between the major markets of Portland and San Francisco.

Table 1

Employment Projections by Industry				
Region 8: Jackson and Josephine Counties				
2002-2012				
	2002	2012	Change	Percent Change
TOTAL NONFARM PAYROLL EMPLOYMENT	94,810	109,620	14,810	15.6%
GOODS PRODUCING	16,120	17,130	1,010	6.3%
SERVICE PRODUCING	78,690	92,490	13,800	17.5%
MANUFACTURING, TOTAL	11,250	11,550	300	2.7%
Durable Goods	9,010	9,120	110	1.2%
Lumber & Wood Products	4,900	4,260	-640	-13.1%
Other Durable Goods	4,110	4,860	750	18.2%
Nondurable Goods	2,240	2,430	190	8.5%
Food & Kindred Products	610	690	80	13.1%
Printing & Publishing	950	1,010	60	6.3%
Other Nondurable Goods	680	730	50	7.4%
NONMANUFACTURING, TOTAL	83,560	98,070	14,510	17.4%
Mining & Quarrying	230	240	10	4.3%
Construction	4,640	5,340	700	15.1%
Transportation & Public Utilities	4,480	4,970	490	10.9%
Transportation	2,710	3,030	320	11.8%
Communications & Utilities	1,770	1,940	170	9.6%
Wholesale & Retail Trade	27,910	32,400	4,490	16.1%
Wholesale Trade	2,930	3,440	510	17.4%
Retail Trade	24,980	28,960	3,980	15.9%
General Merchandise & Food Stores	6,000	6,810	810	13.5%
Eating & Drinking Places	8,120	9,360	1,240	15.3%
Other Retail Trade	10,860	12,790	1,930	17.8%
Finance, Insurance, & Real Estate	4,610	5,350	740	16.1%
Services	28,040	35,250	7,210	25.7%
Business & Professional Services	5,200	6,450	1,250	24.0%
Health Services	10,200	13,410	3,210	31.5%
Other Services	12,640	15,390	2,750	21.8%
Government	13,650	14,520	870	6.4%
Federal Government	2,060	2,130	70	3.4%
State Government	2,100	2,250	150	7.1%
Education	850	900	50	5.9%
Other State	1,250	1,350	100	8.0%
Local Government	9,490	10,140	650	6.8%
Education	5,700	5,950	250	4.4%
Other Local	3,790	4,190	400	10.6%

Government employment is forecast to grow more slowly than the average of all industries in the coming decade, up by just 6.4 percent. Efforts at the national level to privatize some government jobs may slow growth in federal government employment. State budgets have been squeezed by declining revenue. Local government budgets likely will deal with declining Oregon and California timber receipt dollars. The sunseting of the safety net legislation designed to cushion the loss of those timber dollars will impact city, county and local education-related employment.

Census Bureau and State Cooperative Local Employment Dynamics Data

Local employment dynamics (LED) data for Oregon are based primarily on quarterly earnings reports submitted by Oregon employers covered by unemployment insurance (UI). These quarterly reports provide information on earnings of workers as well as employer characteristics. Roughly nine in 10 jobs in Oregon are covered by UI, with notable exceptions including the self-employed, small agricultural employers, elected officials, and many real estate and insurance-related occupations, which are paid solely by commission. The U.S. Census Bureau integrates information about individuals (e.g., place of residence, sex, age, earnings) with information about the employer (e.g., place of work, industry, and employment). These data are used to generate quarterly reports that provide a wealth of information regarding interactions between workers and employers over time.

In the Rogue Valley, the industries with the highest turnover were agriculture, retail trade, construction and services. Lower turnover industries include mining, manufacturing, transportation and utilities, wholesale trade, and finance, insurance, and real estate. Industries with lower turnover typically have higher pay, and more full-time and year-round employment. Construction pays above the average for all industries, but also exhibits a seasonal hiring pattern. Table 2 shows total employment, hires, separations and turnover by SIC industry group for 2002 in Region 8.

Table 2

Region 8: Full-Quarter Local Employment Dynamics Measures*, 2002				
Industry	Employment	Hires	Separations	Turnover
All Private Industries	70,999	8,386	7,837	12.2%
Agriculture	1,859	280	299	18.8%
Mining	185	17	15	9.5%
Construction	3,770	473	430	13.2%
Manufacturing	10,588	688	751	7.3%
Transportation and Utilities	4,036	341	325	8.7%
Wholesale Trade	2,792	243	191	8.2%
Retail Trade	21,379	3,142	2,675	14.5%
Finance, Insurance, and Real Estate	3,357	304	276	9.1%
Services	23,034	2,900	2,875	13.3%

**Average of quarterly values for full-quarter employees.
Source: Local Employment Dynamics; Quarterly Workforce Indicators*



*Regional Profile
Labor Force, Employment and
Unemployment in Region 8*

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INTRODUCTION

In this discussion of labor force, employment and unemployment trends in the Rogue Valley, it may be helpful to first dispel a couple of common myths. The total number of unemployed and the unemployment rate includes individuals who may not be receiving unemployment insurance (UI) benefits. People who exhaust their UI claim without returning to work are considered unemployed if they are still looking for work. If someone has quit looking for work, they are not considered in the labor force and not counted as unemployed in Local Area Unemployment Statistics (LAUS) data. There are estimates of these "discouraged workers" at the national level, but not for state and local areas. Someone may also be collecting UI benefits but not be counted as unemployed. They may be working part-time and receiving partial benefits.

The following analysis provides an overview of recent trends in the region's labor force. How has the labor force grown over time? Who is counted in the labor force? How has the age composition of the labor force changed over the past decade? Trends in the region's unemployment rate, types of unemployment, and trends in the state's labor force participation rate are examined. We'll also discuss how a person's education level is likely to affect the probability that they will be employed. All students and new entrants to the labor market should understand how educational attainment affects earnings and employment prospects. Seasonal trends in employment and unemployment in each county in the region also will be examined.

LABOR FORCE: EMPLOYMENT AND UNEMPLOYMENT

Labor Force

The labor force consists of all residents 16 and older who are either employed or unemployed and actively seeking work. Each person is counted only once in labor force statistics even if he or she holds more than one job. Institutionalized individuals are excluded from official labor force statistics, as are active-duty Armed Forces personnel, which is why the term "civilian" labor force is often used.

Employed: A labor force participant is employed if he or she:

- worked at least one hour as a paid employee; or
- worked in his or her own business, profession, or farm; or
- worked at least 15 hours as an unpaid worker in an enterprise operated by a family member; or
- was temporarily absent from work because of vacation, illness, bad weather, childcare problems, parental leave, labor-management dispute, job training or other family or personal reasons.

Unemployed: A labor force participant is unemployed if he or she:

- had no job,
- was available for work,
- made specific efforts to find work, or
- was waiting to be recalled to a job after a layoff, regardless of whether or not he or she was looking for other work.

The definition of unemployment excludes certain groups who are sometimes thought of as being unemployed or underemployed. Discouraged workers – those who would like to work but have stopped looking – are not counted because they are not actively seeking work. People who work part time but would prefer full time work also are not counted as unemployed because they are working. While neither of these groups is included in unemployment figures, national data for each are gathered and published separately.

There are five major “unemployed” categories:

- **Job losers**, who are on temporary or permanent layoff
- **Job leavers**, who voluntarily leave a job and immediately begin to look for another
- **Those who complete temporary jobs** and begin to look for new jobs.
- **Re-entrants**, who worked, left the labor force, and have begun a new job search
- **New entrants**, who have never worked before

Unemployment Rate: The unemployment rate is simply the number of unemployed people expressed as a percentage of the labor force.

To help distinguish the causes of rising or falling unemployment rates, economists often characterize unemployment as:

- **Seasonal unemployment**, which results from normal, repetitive fluctuations in business activity that occur as the seasons change, for example, post-holiday layoffs in the retail trade sector
- **Cyclical unemployment**, which results from a general downturn in business activity that is brought about by reduced demand for goods and services such as during a recession
- **Structural unemployment**, which refers to a mismatch between industry needs and the skills of the local workforce, typically caused by a change in the economic structure of an area or by technological change
- **Frictional unemployment**, which occurs due to inevitable delays between starting a job search and finding a suitable job.

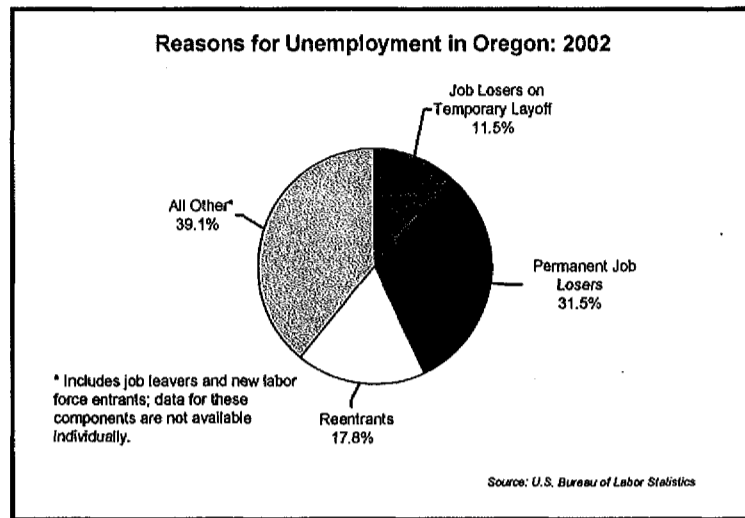
Reasons for Unemployment

“Job losers” make up the largest share of Oregon’s unemployed, accounting for 43 percent of the total in 2002. About 62 percent of the job losers have lost their jobs permanently, while the rest are on temporary layoff (Graph 1).

The share of the unemployed who are “job leavers” typically varies with the state of the economy. During recessions, fewer people voluntarily leave their jobs since opportunities elsewhere are diminished. However,

when the economy and labor demand are strong, more people are likely to quit their jobs, confident that they will soon find something better.

New entrants to the labor force have remained a relatively small and fairly constant fraction of the total unemployed (4% to 8%), primarily reflecting the size of the youth population. Unemployment among re-entrants to the labor force, however, is larger and more variable, following a pattern similar to that of job leavers. The number of re-entrants tends to fall when the economy is weak and rise when job growth is strong.



Graph 1

Unemployment Myths and Realities

A person does not have to be drawing UI benefits to be counted as unemployed for statistical purposes. Tallies of unemployment insurance recipients are, indeed, one factor used in the calculation of local area unemployment rates, but several other statistical inputs are considered, too. Fewer than half of the people counted as unemployed actually are receiving unemployment insurance payments. It's likely that job leavers, re-entrants, and new entrants, for example, would have a difficult time qualifying for unemployment benefits, even though they count among the jobless for statistical purposes. Unemployment insurance benefits vary by individual case; the preceding sentence is a generalization.

In fact, some people who draw unemployment insurance benefits are counted as employed. For example, a person who worked full time but has been involuntarily cut to part-time hours may qualify for partial unemployment insurance benefits. Another example would be a person who has been let go by one employer and works odd jobs for another employer or through self-employment. If the earnings from these odd jobs are small, partial unemployment benefits may be paid. However, since the individual works at least one hour per week, he or she is statistically employed under the labor force definitions.

UNEMPLOYMENT TRENDS: HISTORICAL AND RECENT

The recent recession that has given Oregon the distinction of having one of the highest unemployment rates in the nation for much of the past three years also has affected unemployment rates in Region 8 (Jackson and Josephine counties). During the 35 months between July 2001 and May 2004, Oregon's unemployment rate was either first or second highest of all 50 states. However, recent job growth has helped lower the state's unemployment rate by as much as two percentage points. This job growth, combined with the trend toward increasing net outflow of drivers' licenses to other states (excluding California), may work to reduce Oregon's national ranking in unemployment rate over the next year or two.

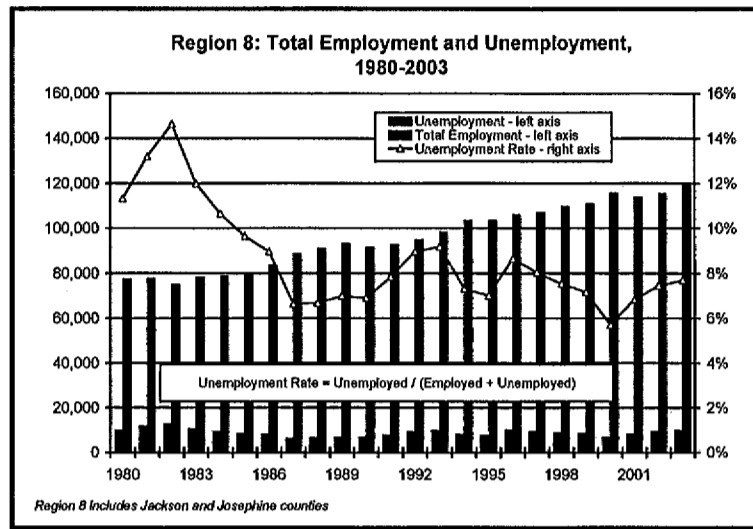
After generally trending downward from the peak of over 14 percent in 1982, the Rogue Valley's unemployment rate fell to 5.7 percent in 2000 (Graph 2). By 2003, the rate had risen to 7.7 percent. The number of people estimated as unemployed rose from its low point of 7,021 in 2000 to 9,969 in 2003.

During those three years both the civilian labor force and total employment in Region 8 increased. The Rogue Valley's civilian labor force totaled 122,876 in 2000. By 2003, the civilian labor force had risen to 129,304 for an increase of 5.2 percent. In comparison, Oregon's statewide civilian labor force increased by 1.8 percent between 2000 and 2003. Total employment in Region 8 grew from 115,855 in 2000 to 119,335 in 2003 for a growth of 3.0 percent. With the labor force growing faster than total employment, this helps explain the increase in the unemployment rate between 2000 and 2003 in the Rogue Valley.

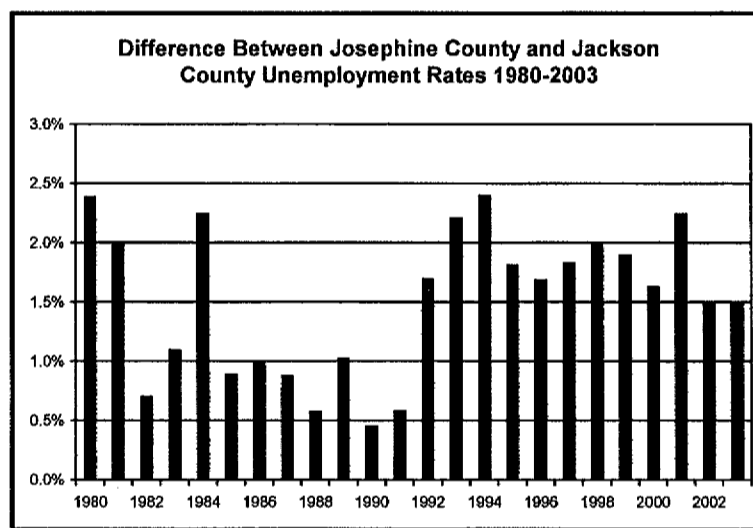
Jackson County's unemployment rate has historically been lower than Josephine County's. Since 1980, Josephine County's annual average unemployment rate has averaged 1.5 percentage points higher than Jackson County's. In 1990, the rate difference was 0.5 percent. During 1980 and 1994, Josephine County's rate was 2.4 percentage points higher than Jackson County's (Graph 3).

Josephine County's unemployment rate was 8.8 percent in 2003, very close to the average of 8.7 percent for the previous 10 years. While a rate of close to 9 percent indicates a rate higher than the national average, which is currently close to six percent, it is still much lower than during the 1980 through 1984 period when the rate ranged from 12.3 percent to 15.2 percent (Graph 4).

Jackson County also experienced very high unemployment rates during the 1980 to 1984 recessionary period. The unemployment rate during that time ranged from 10 percent to 14.4 percent. Jackson County's unemployment rate for 2003, at 7.3 percent, was slightly higher than the 6.9 percent average over the previous 10 years. For the first time, in year 2002, Jackson County's



Graph 2



Graph 3

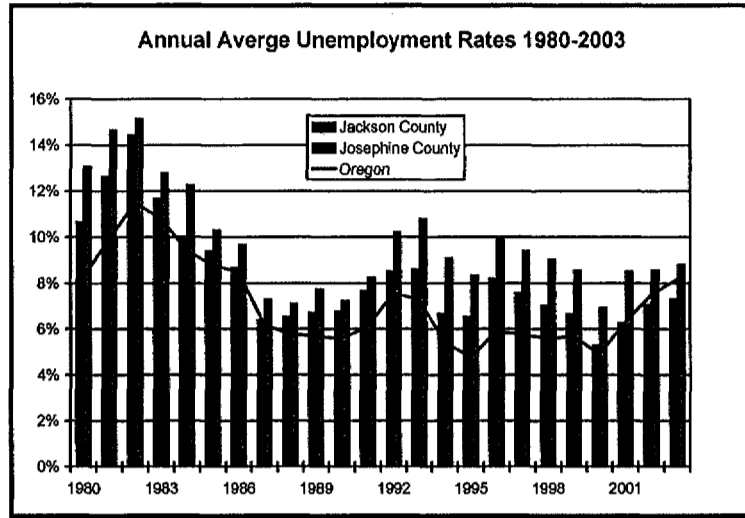
unemployment rate was lower than the statewide average. We equaled the state's rate in 2001, at 6.3 percent and also dipped below the statewide average in 2003, when the state's annual average unemployment rate was 8.2 percent. Recessionary clouds that rained hardest on the Portland area contributed to the hike in Oregon's statewide unemployment rate over the past few years.

Seasonal Trends in Region 8 Labor Force Statistics

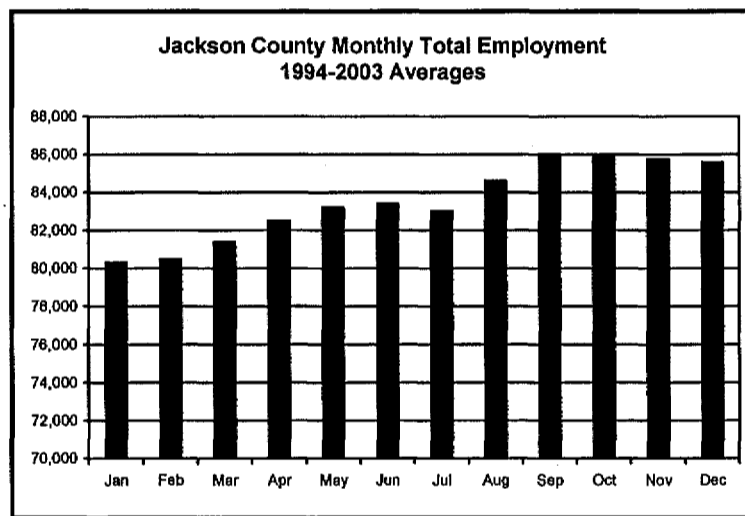
Many industries in the Rogue Valley have definite and predictable seasonal employment trends. This can be observed in overall employment and unemployment trends. For this analysis, we looked at the monthly average data over the past 10 years to examine trends in seasonality in the Rogue Valley's total employment and total unemployment data series. Jackson and Josephine counties are presented separately, to examine the similarities and differences in seasonal employment trends.

In Jackson County, average monthly total employment is highest during the last one-third of the year (Graph 5). Over the past 10 years, employment counts have been highest in September and October and dipped just slightly during November and December. In September, many school district employees are returning to work after summer hiatus. The tourism-dependent leisure and hospitality industry is just beginning to scale back seasonal employees, and the construction industry is still at its peak before winter rains arrive. Agriculture employment, which is included in this data series, reaches a peak in Jackson County during September and October when pears and other crops are being picked and packed. In November and December, seasonal hiring for the county's strong retail trade sector is ramping up for customer service, gift package assembly and holiday shopping sales. Employment counts are lowest in the first quarter of the year.

Total average monthly unemployment follows nearly a reverse trend as total employment, with the greatest number historically unemployed in January and February (Graph 6). There also is a slight spike in total unemployment in June and July, as it is likely that many youths and college students



Graph 4



Graph 5

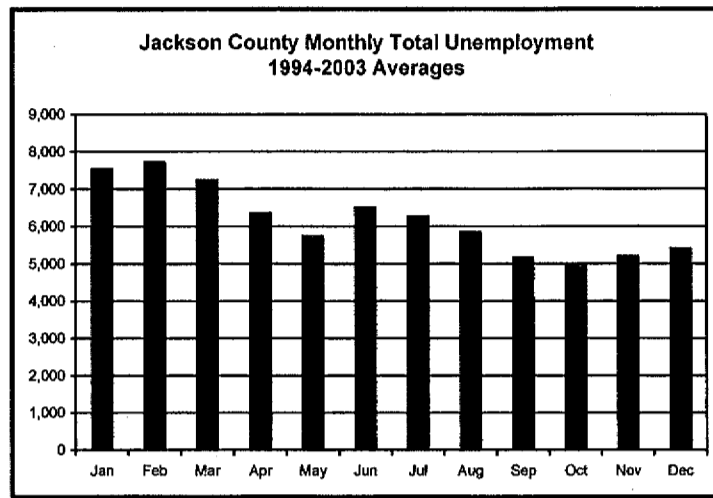
may re-enter the workforce for the summer, and those who are seeking work but not finding work are then counted as unemployed. Some school district employees may also be re-entering the workforce in search of summer employment.

Josephine County experiences a slightly different seasonal employment trend. Total employment peaks in June through October (Graph 7). Then total employment historically trends downward over the winter months, reaching a trough in January. Josephine County has less employment in agriculture, so the peak harvest months have a smaller effect on total employment than they do in Jackson County. Josephine County also does not have as much seasonal employment in the retail sector as its neighboring county.

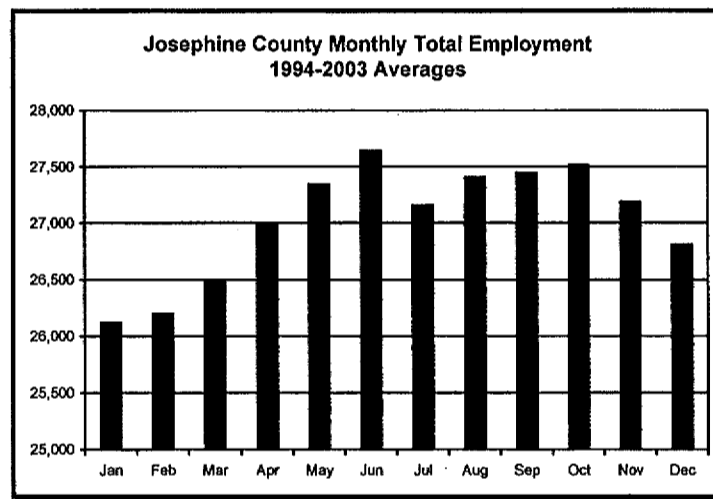
Similar to Jackson County, average monthly total unemployment reaches its peak in the first quarter of the year when tourism, construction, logging and other seasonal industries are at their low points (Graph 8). Total unemployment shows only slight variation between April and December in Josephine County.

Rogue Valley Workforce Growing Older Over Last Decade

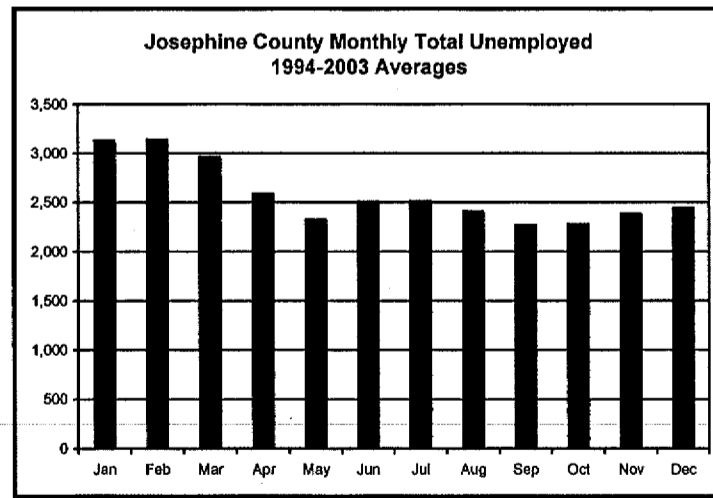
The Census Bureau has partnered with many states to create a longitudinal database containing labor force indicators. The Quarterly Workforce Indicators produced from the bureau's Local Employment Household Dynamics program were created to fill in the gaps for many labor market information needs. Some new data sets from this project included turnover, number of new hires, job creation and average monthly earnings. These data can be obtained by



Graph 6



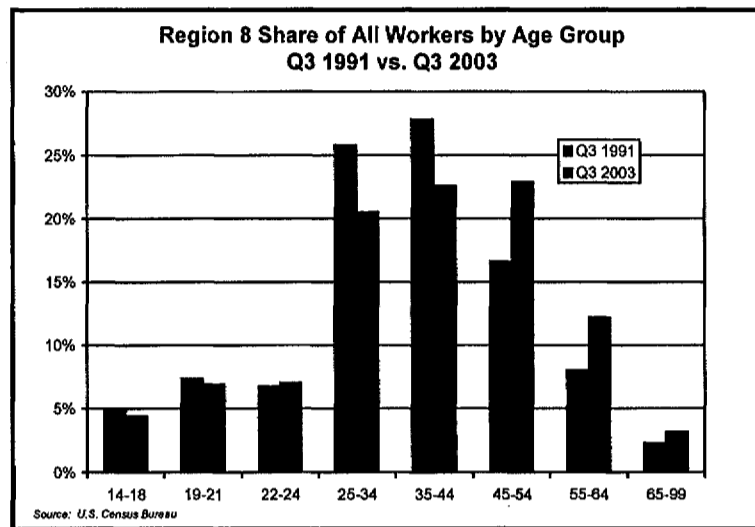
Graph 7



Graph 8

industry, sex and age to the county level. Quarterly data are available from 1991 through the third quarter of 2003. We now have a measurement that shows how the age of the workforce is changing over time.

In Region 8, the workforce has been aging during the past decade (Graph 9). In the third quarter of 1991, the percentage of 25- to 34-year-old workers exceeded the percentage of those ages 45 to 54 by a 26-percent to 17-percent margin. By the third quarter of 2003, the Rogue Valley had a higher percentage of the workforce between 45 and 54 than those 25 to 43, 23 percent versus 20.5 percent. In net numbers, the 25- to 34-year-old workers outnumbered the 45- to 54-year-old cohort by 5,517 in 1991. By the third quarter of 2003, there were 2,135 more workers ages 45 to 54 than those ages 25 to 34. This is a dramatic change in workforce composition for just over 10 year's time. More information can be found at <http://lehd.dsd.census.gov/led/00/>.



Graph 9

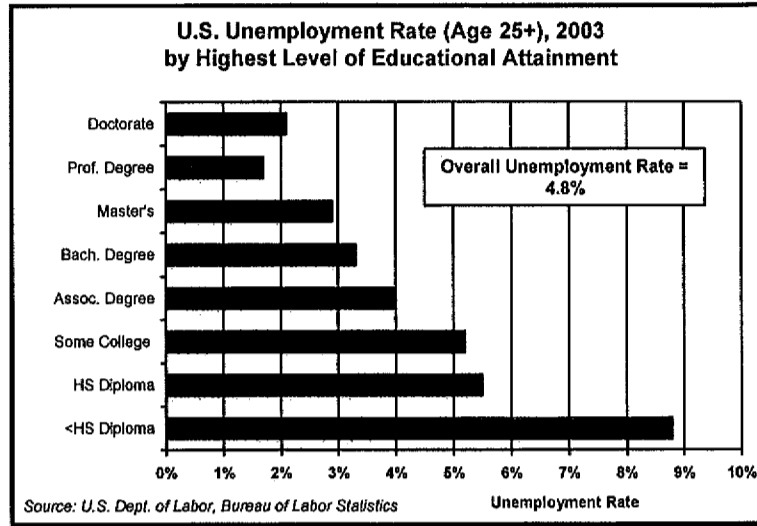
LABOR FORCE TRENDS AND CHARACTERISTICS

The nation's labor force participation rates – the percentage of the population age 16 or older working or looking for work – was about 59 percent in 1964. It climbed for many years as women increasingly entered the paid labor force and the baby-boom generation moved out of high school and college and into the workplace. Oregon's rate rose from about 62 percent in 1975 – about one point above the U.S. rate in that year – and hit a peak of about 69 percent in 1996. Since then, it has drifted down slightly, bouncing between 68 percent and 69 percent except in the recession year of 2002, when it dropped to 67.5 percent.

On average, workers with higher levels of formal education are less likely to be unemployed (Graph 10). National data for 2003 indicate that, as a group, workers 25 or older with a first professional degree (e.g., a law or medical degree) had an unemployment rate of only 1.7 percent, while those with a doctorate had an unemployment rate of 2.1 percent. At the other end of the scale, those who had not completed high school had an unemployment rate of 8.8 percent. The unemployment rates of groups between these two extremes were systematically related to the groups' educational attainment levels, with higher levels of education corresponding to lower unemployment rates. Although comparable Oregon data are not available, it is reasonable to assume this pattern occurs in Oregon just as it does in the nation as a whole.

Slightly more than one of five workers in Oregon works part time. Since at least 1978, the percentage of Oregonians working part time has varied from as low as 18.5 percent to as high as 24.4 percent,

but in most years it is very close to 22 percent. In 2002, about nine of 10 part-time workers in Oregon indicated they worked part time voluntarily (e.g., to accommodate their other activities such as school or family life) while one in 10 worked involuntarily (e.g., due to their inability to find full-time work). Over the past decade, as few as one in 20 said they worked part time involuntarily.



Graph 10

OREGON EMPLOYMENT DEPARTMENT
Workforce and Economic Research
Josephine County

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	1994-2005 % Change
Population 1:													
Civilian Labor Force 2:	69,390	71,290	72,300	73,410	74,430	75,210	76,050	76,850	77,850	78,350	78,600	79,645	15%
Unemployment	28,420	28,344	28,774	29,056	29,193	29,640	31,334	32,072	32,788	33,852	34,446	35,047	23%
Percent of Labor Force	41%	40%	40%	40%	40%	40%	41%	41%	42%	43%	44%	44%	-7%
Total Employment	25,913	25,944	25,046	26,426	26,516	27,190	28,175	29,456	29,965	30,863	31,662	32,621	26%
Nonfarm Payroll Employment 3:													
Total Nonfarm Payroll Employment	19,680	20,010	20,360	20,870	21,150	21,790	22,390	22,590	22,860	23,480	24,470	25,000	13%
Total Private	16,230	16,420	16,670	17,110	17,310	17,890	18,410	18,170	18,490	19,110	20,280	21,450	19%
Natural Resources and Mining	NA	NA	NA	NA	NA	NA	NA	250	290	310	360	380	44%
Construction	NA	NA	NA	NA	NA	NA	NA	2,940	2,870	2,800	3,000	3,300	84%
Manufacturing	NA	NA	NA	NA	NA	NA	NA	940	900	860	850	750	-20%
Wood Product Manufacturing	NA	NA	NA	NA	NA	NA	NA	4,630	4,630	4,840	5,050	5,320	15%
Trade, Transportation, and Utilities	NA	NA	NA	NA	NA	NA	NA	630	650	730	850	950	51%
Wholesale Trade	NA	NA	NA	NA	NA	NA	NA	3,490	3,510	3,700	3,780	3,920	12%
Retail Trade	NA	NA	NA	NA	NA	NA	NA	830	850	890	860	880	6%
Food and Beverage Stores	NA	NA	NA	NA	NA	NA	NA	510	470	420	460	450	-12%
Transportation, Warehousing, and Utilities	NA	NA	NA	NA	NA	NA	NA	420	360	350	340	350	-18%
Information	NA	NA	NA	NA	NA	NA	NA	1,210	1,290	1,320	1,360	1,440	19%
Financial Activities	NA	NA	NA	NA	NA	NA	NA	1,290	1,340	1,490	1,580	1,740	47%
Professional and Business Services	NA	NA	NA	NA	NA	NA	NA	3,220	3,380	3,410	3,580	3,740	47%
Educational and Health Services	NA	NA	NA	NA	NA	NA	NA	3,020	3,150	3,170	3,400	3,580	20%
Educational Services	NA	NA	NA	NA	NA	NA	NA	1,210	1,210	1,210	1,210	1,200	0%
Health Care and Social Assistance	NA	NA	NA	NA	NA	NA	NA	1,810	1,940	1,960	2,190	2,380	36%
Nursing and Residential Care Facilities	NA	NA	NA	NA	NA	NA	NA	1,250	1,250	1,250	1,250	1,250	0%
Ambulatory Health Care Services	NA	NA	NA	NA	NA	NA	NA	2,240	2,890	2,920	2,940	3,130	41%
Leisure and Hospitality	NA	NA	NA	NA	NA	NA	NA	840	860	860	860	840	0%
Other Services	NA	NA	NA	NA	NA	NA	NA	4,410	4,300	4,370	4,180	4,150	-6%
Government 4:	3,450	3,590	3,690	3,760	3,840	3,900	3,970	4,410	4,380	4,370	4,180	4,150	0%
Federal Government	NA	NA	NA	NA	NA	NA	NA	330	340	340	330	330	0%
State Government	NA	NA	NA	NA	NA	NA	NA	960	1,010	960	950	950	-5%
Local Government	NA	NA	NA	NA	NA	NA	NA	3,120	3,040	3,070	2,810	2,880	-7%
Local Education	NA	NA	NA	NA	NA	NA	NA	2,100	1,950	1,990	1,860	1,940	-8%
Local Government Excluding Educational Services	NA	NA	NA	NA	NA	NA	NA	1,020	1,090	1,080	1,050	950	-7%
Covered Payroll (millions) 5:													
Average Covered Wage	\$19,080	\$19,747	\$20,695	\$21,471	\$22,245	\$23,152	\$23,881	\$24,401	\$25,346	\$26,057	\$27,182	\$27,722	46%
Total Covered Wage (Oregon)	\$24,769	\$25,837	\$27,045	\$28,047	\$29,046	\$30,187	\$31,278	\$32,202	\$33,685	\$34,446	\$35,621	\$36,591	48%
Josephine County-Oregon Difference	-\$7,759	-\$6,090	-\$5,551	-\$6,556	-\$7,289	-\$7,711	-\$8,095	-\$8,101	-\$8,337	-\$8,389	-\$8,459	-\$8,869	54%
Gross Farm Sales (000's) 6:	\$31,920	\$34,102	\$36,491	\$38,187	\$39,495	\$41,979	\$21,889	\$21,934	\$19,856	\$22,758	\$27,794	\$32,010	0%
Per Capita Income 7:													
Josephine County	\$16,779	\$17,547	\$18,314	\$19,134	\$19,929	\$20,877	\$21,438	\$22,272	\$23,425	\$24,506	NA	NA	52%
Oregon	\$21,050	\$22,293	\$23,148	\$24,069	\$24,942	\$25,845	\$26,687	\$27,577	\$28,527	\$29,446	\$30,561	\$31,103	50%
U.S.	\$24,772	\$25,979	\$27,175	\$28,334	\$29,534	\$30,834	\$32,145	\$33,574	\$35,010	\$36,459	\$38,050	\$39,588	56%
Josephine County-U.S. Difference	-\$8,393	-\$8,532	-\$8,861	-\$9,200	-\$9,604	-\$10,256	-\$11,707	-\$11,642	-\$11,585	-\$11,953	NA	NA	
Consumer Price Index for All Urban Consumers 8:													
Portland-Salem OR-WA	148.9	152.2	156.6	161.0	167.1	172.6	178.0	182.4	183.8	186.3	191.1	196.0	32%
Percent Change	2.0%	2.3%	2.8%	3.4%	3.9%	3.3%	3.1%	2.5%	0.8%	1.4%	2.6%	2.8%	
United States	148.2	152.4	156.9	161.5	167.0	172.2	177.1	181.9	183.0	184.0	189.9	195.3	32%
Percent Change	2.6%	2.8%	3.0%	2.5%	1.6%	2.2%	3.4%	2.8%	1.6%	2.3%	2.7%	3.4%	

1/ Population estimates are from the Population Research Center at Portland State University, Washington State's Office of Financial Management, and the U.S. Census.
2/ Civilian labor force, total employment, and unemployment are by place of residence.
3/ Nonfarm payroll employment is by place of work. Totals may not sum due to rounding.
4/ Series break: 2001 and later data for government are not comparable to prior years.
5/ "Covered" refers to workers covered by unemployment insurance.
6/ Data from Oregon County and Agricultural Estimates, Oregon State University Extension
7/ Data from Bureau of Economic Analysis
8/ Data from Bureau of Labor Statistics
NA = Not available



**EMPLOYMENT PROJECTIONS BY OCCUPATION
2004-2014
Region 8 (Jackson and Josephine Counties)**

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Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014					Competitive Education	
	2004 Employment	2014 Employment	Percent Growth	2004-2014			Minimum Education
				Growth Openings	Replacement Openings		
Total All Occupations	104,150	124,425	19.5%	20,275	27,786	48,061	
Management, Business, and Financial	7,300	8,695	19.1%	1,395	1,572	2,967	
Management Occupations	4,370	5,197	18.9%	827	944	1,771	
Top Executives	1,347	1,614	19.8%	267	290	557	
Chief Executives	82	95	15.9%	13	17	30	
General and Operations Managers	1,256	1,509	20.1%	253	272	525	
Legislators	9	10	11.1%	1	1	2	
Advertising, Marketing, Promotions, Public Relations, and Sales Managers	330	401	21.5%	71	69	140	
Advertising and Promotions Managers	36	43	19.4%	7	7	14	
Marketing Managers	100	125	25.0%	25	22	47	
Sales Managers	149	176	18.1%	27	31	58	
Public Relations Managers	45	57	26.7%	12	9	21	
Operations Specialties Managers	705	832	18.0%	127	142	269	
Administrative Services Managers	85	104	22.4%	19	19	38	
Computer and Information Systems Managers	108	135	25.0%	27	23	50	
Financial Managers	204	236	15.7%	32	34	66	
Human Resources Managers, All Other	85	105	23.5%	20	17	37	
Industrial Production Managers	121	135	11.6%	14	26	40	
Purchasing Managers	41	46	12.2%	5	10	15	
Transportation, Storage, and Distribution Managers	61	71	16.4%	10	13	23	
Other Management Occupations	1,988	2,350	18.2%	362	443	805	
Farm, Ranch, and Other Agricultural Managers	76	81	6.6%	5	14	19	
Construction Managers	243	296	21.8%	53	51	104	
Preschool and Child Care Administrators	43	49	14.0%	6	12	18	
Elementary and Secondary School Administrators	159	180	13.2%	21	44	65	
Postsecondary School Administrators	67	73	9.0%	6	18	24	
Education Administrators, All Other	12	13	8.3%	1	3	4	
Engineering Managers	51	58	13.7%	7	11	18	
Food Service Managers	196	244	24.5%	48	37	85	
Funeral Directors	27	32	18.5%	5	8	13	
Gaming Managers	3	4	33.3%	1	1	2	
Lodging Managers	26	32	23.1%	6	5	11	
Medical and Health Services Managers	227	286	26.0%	59	53	112	
Natural Sciences Managers	51	54	5.9%	3	11	14	
Postmasters and Mail Superintendents	18	20	11.1%	2	4	6	
Property, Real Estate, and Community Association Managers	232	263	13.4%	31	48	79	
Social and Community Service Managers	117	147	25.6%	30	26	56	
Managers, All Other	440	518	17.7%	78	97	175	
Business and Financial Operations Occupations	2,930	3,498	19.4%	568	628	1,196	
Business Operations Specialists	1,746	2,060	18.0%	314	387	701	

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004 Employment	2014 Employment	Percent Growth	2004-2014		Minimum Education	Competitive Education
				Growth Openings	Replacement Openings		
					Total		
13-1011 Agents and Business Managers of Artists, Performers, and Athletes	3	4	33.3%	1	1	Bachelor's	Bachelor's + Work Exp.
13-1021 Purchasing Agents and Buyers, Farm Products	37	43	16.2%	6	14	Bachelor's	Bachelor's + Work Exp.
13-1022 Wholesale and Retail Buyers, Except Farm Products	184	223	21.2%	39	54	Bachelor's	Bachelor's + Work Exp.
13-1023 Purchasing Agents, Except Wholesale, Retail, and Farm Products	144	171	18.8%	27	40	Bachelor's	Bachelor's + Work Exp.
13-1031 Claims Investigators, Examiners, and Adjusters	49	56	14.3%	7	7	Long OJT	Bachelor's
13-1041 Compliance Officers, Except Agriculture, Construction, Health and Safety, and Transportation	107	117	9.3%	10	27	Bachelor's	Master's
13-1051 Cost Estimators	200	241	20.5%	41	51	Bachelor's	Bachelor's + Work Exp.
13-1061 Emergency Management Specialists	3	4	33.3%	1	1	Work Exp.	Work Exp.
13-1071 Employment, Recruitment, and Placement Specialists	150	178	18.7%	28	27	Bachelor's	Bachelor's + Work Exp.
13-1072 Compensation, Benefits, and Job Analysis Specialists	36	41	13.9%	5	6	Bachelor's	Bachelor's + Work Exp.
13-1073 Training and Development Specialists	80	95	18.8%	15	14	Bachelor's	Bachelor's + Work Exp.
13-1079 Human Resources, Training, and Labor Relations Specialists, All Other	120	133	10.8%	13	21	Bachelor's	Bachelor's + Work Exp.
13-1081 Logisticians	9	11	22.2%	2	2	Bachelor's	Bachelor's + Work Exp.
13-1111 Management Analysts	56	67	19.6%	11	9	Bachelor's	Master's
13-1121 Meeting and Convention Planners	21	24	14.3%	3	5	Work Exp.	Bachelor's
13-1199 Business Operations Specialists, All Other	547	652	19.2%	105	108	Bachelor's	Bachelor's + Work Exp.
13-2000 Financial Specialists	1,184	1,438	21.5%	254	241	Bachelor's	Bachelor's + Work Exp.
13-2011 Accountants and Auditors	553	684	23.7%	131	120	Bachelor's	Bachelor's + Work Exp.
13-2021 Appraisers and Assessors of Real Estate	30	33	10.0%	3	7	Post-sec.	Bachelor's
13-2031 Budget Analysts	18	19	5.6%	1	3	Bachelor's	Bachelor's + Work Exp.
13-2041 Credit Analysts	38	45	18.4%	7	7	Bachelor's	Bachelor's + Work Exp.
13-2051 Financial Analysts	24	27	12.5%	3	4	Bachelor's	Master's
13-2052 Personal Financial Advisors	9	13	44.4%	4	1	Bachelor's	Bachelor's + Work Exp.
13-2053 Insurance Underwriters	9	10	11.1%	1	2	Bachelor's	Bachelor's + Work Exp.
13-2061 Financial Examiners	4	5	25.0%	1	1	Bachelor's	Bachelor's + Work Exp.
13-2071 Loan Counselors	42	49	16.7%	7	8	Bachelor's	Bachelor's + Work Exp.
13-2072 Tax Examiners, Collectors, and Revenue Agents	318	393	23.6%	75	60	Bachelor's	Bachelor's + Work Exp.
13-2081 Tax Preparers	30	33	10.0%	3	7	Bachelor's	Bachelor's + Work Exp.
13-2082 Financial Specialists, All Other	32	36	12.5%	4	6	Post-sec.	Post-sec. + Work Exp.
13-2099 Professional and Related	77	91	18.2%	14	15	Bachelor's	Bachelor's + Work Exp.
15-0000 Computer and Mathematical Science Occupations	12,988	15,030	15.7%	2,042	2,883		
15-1000 Computer Specialists	1,064	1,306	22.7%	242	166		
15-1021 Computer Programmers	1,031	1,265	22.7%	234	154		
15-1031 Computer Software Engineers, Applications	106	124	17.0%	18	28	Bachelor's	Bachelor's + Work Exp.
15-1032 Computer Software Engineers, Systems Software	82	102	24.4%	20	10	Bachelor's	Bachelor's + Work Exp.
15-1041 Computer Support Specialists	33	41	24.2%	8	4	Bachelor's	Bachelor's + Work Exp.
15-1041 Computer Systems Analysts	247	307	24.3%	60	36	Post-sec.	Bachelor's
15-1051 Computer Systems Analysts	137	170	24.1%	33	19	Bachelor's	Bachelor's + Work Exp.

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004 Employment	2004-2014			Competitive Education	
		2014 Employment	Percent Growth	2014 Replacement Openings		
15-1061 Database Administrators	37	49	32.4%	12	17	Master's
15-1071 Network and Computer Systems Administrators	130	163	25.4%	33	17	Bachelor's + Work Exp.
15-1081 Network Systems and Data Communications Analysts	110	138	25.5%	28	16	Bachelor's + Work Exp.
15-1099 Computer Specialists, All Other	149	171	14.8%	22	19	Bachelor's
15-2000 Mathematical Science Occupations	33	41	24.2%	8	12	Post-sec.
15-2011 Actuaries	15	18	20.0%	3	7	Bachelor's
15-2031 Operations Research Analysts	16	19	18.8%	3	4	Master's
15-2041 Statisticians	2	4	100.0%	2	1	Master's
17-0000 Architecture and Engineering Occupations	800	942	17.8%	142	212	3
17-1000 Architects, Surveyors, and Cartographers	85	106	24.7%	21	26	47
17-1011 Architects, Except Landscape and Naval	18	24	33.3%	6	3	9
17-1012 Landscape Architects	8	10	25.0%	2	1	3
17-1021 Cartographers and Photogrammetrists	24	29	20.8%	5	9	Bachelor's + Work Exp.
17-1022 Surveyors	35	43	22.9%	8	13	Bachelor's + Work Exp.
17-2000 Engineers	305	352	15.4%	47	69	21
17-2011 Aerospace Engineers	7	8	14.3%	1	2	116
17-2021 Agricultural Engineers	1	3	200.0%	2	1	3
17-2041 Chemical Engineers	1	1	0.0%	0	0	3
17-2051 Civil Engineers	85	101	18.8%	16	15	0
17-2071 Electrical Engineers	20	21	5.0%	1	4	31
17-2072 Electronics Engineers, Except Computer	41	46	12.2%	5	9	5
17-2081 Environmental Engineers	11	14	27.3%	3	2	14
17-2111 Health and Safety Engineers, Except Mining Safety Engineers and Inspectors	5	7	40.0%	2	1	5
17-2112 Industrial Engineers	29	33	13.8%	4	8	3
17-2131 Materials Engineers	1	1	0.0%	0	0	12
17-2141 Mechanical Engineers	66	75	13.6%	9	19	Master's
17-2199 Engineers, All Other	38	42	10.5%	4	8	Master's
17-3000 Drafters, Engineering, and Mapping Technicians	410	484	18.0%	74	117	Master's
17-3011 Architectural and Civil Drafters	80	102	27.5%	22	26	Post-sec. + Work Exp.
17-3012 Electrical and Electronics Drafters	14	15	7.1%	1	4	Post-sec. + Work Exp.
17-3013 Mechanical Drafters	24	27	12.5%	3	7	Bachelor's
17-3019 Drafters, All Other	22	26	18.2%	4	6	Post-sec.
17-3022 Civil Engineering Technicians	76	93	22.4%	17	18	Post-sec. + Work Exp.
17-3023 Electrical and Electronic Engineering Technicians	46	55	19.6%	9	11	Assoc. + Work Exp.
17-3025 Environmental Engineering Technicians	4	5	25.0%	1	1	Assoc. + Work Exp.
17-3027 Mechanical Engineering Technicians	15	15	0.0%	0	3	Assoc. + Work Exp.
17-3029 Engineering Technicians, All Other	66	70	6.1%	4	17	Assoc. + Work Exp.
17-3031 Surveying and Mapping Technicians	63	76	20.6%	13	24	Assoc. + Work Exp.
19-0000 Life, Physical, and Social Science Occupations	989	1,082	9.4%	93	257	37
19-1000 Life Scientists	287	300	4.5%	13	81	94
19-1012 Food Scientists and Technologists	4	8	100.0%	4	1	5

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014				Minimum Education	Competitive Education
	2004 Employment	2014 Employment	Percent Growth	Replacement Openings		
19-1013 Soil and Plant Scientists	64	64	0.0%	0	12	Master's
19-1021 Biochemists and Biophysicists	2	2	0.0%	0	1	Master's
19-1022 Microbiologists	2	3	50.0%	1	2	Master's
19-1023 Zoologists and Wildlife Biologists	38	40	5.3%	2	14	PHD
19-1029 Biological Scientists, All Other	52	52	0.0%	0	16	Master's
19-1031 Conservation Scientists	25	26	4.0%	1	8	Master's
19-1032 Foresters	99	103	4.0%	4	30	Master's
19-1042 Medical Scientists, Except Epidemiologists	1	2	100.0%	1	0	PHD + Work Exp.
19-2000 Physical Scientists	135	153	13.3%	18	37	PHD
19-2012 Physicists	2	2	0.0%	0	1	PHD
19-2021 Atmospheric and Space Scientists	17	17	0.0%	0	6	Master's
19-2031 Chemists	31	35	12.9%	4	11	Master's
19-2032 Materials Scientists	2	2	0.0%	0	1	Master's
19-2041 Environmental Scientists and Specialists, Including Health	30	35	16.7%	5	6	Master's
19-2042 Geoscientists, Except Hydrologists and Geographers	22	27	22.7%	5	5	Master's
19-2043 Hydrologists	19	21	10.5%	2	4	Master's
19-2099 Physical Scientists, All Other	12	14	16.7%	2	3	Master's
19-3000 Social Scientists and Related Workers	181	213	17.7%	32	52	Master's
19-3011 Economists	5	5	0.0%	0	1	Master's
19-3021 Market Research Analysts	30	37	23.3%	7	9	Master's
19-3022 Survey Researchers	11	15	36.4%	4	3	Master's
19-3031 Clinical, Counseling, and School Psychologists	42	52	23.8%	10	11	PHD
19-3039 Psychologists, All Other	9	8	-11.1%	-1	2	PHD
19-3051 Urban and Regional Planners	53	63	18.9%	10	20	Master's + Work Exp.
19-3091 Anthropologists and Archeologists	5	5	0.0%	0	1	Master's
19-3093 Historians	2	2	0.0%	0	0	PHD
19-3099 Social Scientists and Related Workers, All Other	24	26	8.3%	2	5	Master's
19-4000 Life, Physical, and Social Science Technicians	386	416	7.8%	30	87	117
19-4011 Agricultural and Food Science Technicians	13	16	23.1%	3	3	Assoc. + Work Exp.
19-4021 Biological Technicians	119	135	13.4%	16	22	Assoc. + Work Exp.
19-4031 Chemical Technicians	34	40	17.6%	6	9	Assoc. + Work Exp.
19-4061 Social Science Research Assistants	2	2	0.0%	0	0	Master's
19-4091 Environmental Science and Protection Technicians, Including Health	11	13	18.2%	2	3	Bachelor's
19-4092 Forensic Science Technicians	8	8	0.0%	0	2	Bachelor's
19-4093 Forest and Conservation Technicians	146	144	-1.4%	-2	35	Assoc. + Work Exp.
19-4099 Life, Physical, and Social Science Technicians, All Other	53	58	9.4%	5	13	Bachelor's
21-0000 Community and Social Service Occupations	2,271	2,728	20.1%	457	484	941
21-1000 Counselors, Social Workers, and Other Community and Social Service Specialists	1,983	2,395	20.8%	412	428	840
21-1011 Substance Abuse and Behavioral Disorder Counselors	64	77	20.3%	13	17	30
21-1012 Educational, Vocational, and School Counselors	158	183	15.8%	25	40	65

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014					Minimum Education	Competitive Education
	2004 Employment	2014 Employment	Percent Growth	2014 Replacement Openings	Total Openings		
21-1013 Marriage and Family Therapists	14	19	35.7%	5	4	9	Master's + Work Exp.
21-1014 Mental Health Counselors	125	171	36.8%	46	35	81	Master's + Work Exp.
21-1015 Rehabilitation Counselors	125	153	22.4%	28	33	61	Master's + Work Exp.
21-1019 Counselors, All Other	4	5	25.0%	1	1	2	Master's + Work Exp.
21-1021 Child, Family, and School Social Workers	284	340	19.7%	56	56	112	Master's
21-1022 Medical and Public Health Social Workers	24	32	33.3%	8	5	13	Master's + Work Exp.
21-1023 Mental Health and Substance Abuse Social Workers	226	271	19.9%	45	45	90	Master's + Work Exp.
21-1029 Social Workers, All Other	200	234	17.0%	34	39	73	Bachelor's + Work Exp.
21-1091 Health Educators	113	148	31.0%	35	24	59	Master's
21-1092 Probation Officers and Correctional Treatment Specialists	171	191	11.7%	20	33	53	Bachelor's + Work Exp.
21-1093 Social and Human Service Assistants	364	445	22.3%	81	74	155	Bachelor's + Work Exp.
21-1099 Community and Social Service Specialists, All Other	111	126	13.5%	15	22	37	Moderate OJT Assoc.
21-2000 Religious Workers	288	333	15.6%	45	56	101	Moderate OJT Assoc.
21-2011 Clergy	179	208	16.2%	29	40	69	Bachelor's
21-2021 Directors, Religious Activities and Education	59	68	15.3%	9	7	16	Bachelor's + Work Exp.
21-2099 Religious Workers, All Other	50	57	14.0%	7	9	16	Bachelor's + Work Exp.
23-0000 Legal Occupations	403	467	15.9%	64	52	116	Bachelor's
23-1000 Lawyers, Judges, and Related Workers	236	272	15.3%	36	33	69	Bachelor's
23-1011 Lawyers	197	229	16.2%	32	28	60	1st Prof.
23-1021 Administrative Law Judges, Adjudicators, and Hearing Officers	8	8	0.0%	0	1	1	1st Prof.
23-1022 Arbitrators, Mediators, and Conciliators	9	11	22.2%	2	1	3	Bachelor's
23-1023 Judges and Magistrates	22	24	9.1%	2	3	5	Bachelor's
23-2000 Legal Support Workers	167	195	16.8%	28	19	47	1st Prof. + Work Exp.
23-2011 Paralegals and Legal Assistants	63	74	17.5%	11	6	17	Assoc.
23-2092 Law Clerks	16	18	12.5%	2	2	4	Bachelor's
23-2093 Title Examiners, Abstractors, and Searchers	68	81	19.1%	13	9	22	Bachelor's + Work Exp.
23-2099 Legal Support Workers, All Other	20	22	10.0%	2	2	4	Moderate OJT Assoc.
25-0000 Education, Training, and Library Occupations	6,242	7,030	12.6%	788	1,459	2,247	Assoc.
25-1000 Postsecondary Teachers	603	672	11.4%	69	147	216	Post-sec.
25-1191 Graduate Teaching Assistants	8	9	12.5%	1	2	3	Bachelor's
25-1199 Postsecondary Teachers, Except Graduate Teaching Assistants	595	663	11.4%	68	145	213	Master's
25-2000 Primary, Secondary, and Special Education Teachers	3,451	3,899	13.0%	448	870	1,318	PhD
25-2011 Preschool Teachers, Except Special Education	214	262	22.4%	48	30	78	Moderate OJT
25-2012 Kindergarten Teachers, Except Special Education	130	147	13.1%	17	18	35	Bachelor's
25-2021 Elementary School Teachers, Except Special Education	1,302	1,463	12.4%	161	319	480	Master's
25-2022 Middle School Teachers, Except Special and Vocational Education	629	700	11.3%	71	153	224	Bachelor's
25-2023 Vocational Education Teachers, Middle School	14	15	7.1%	1	3	4	Master's
25-2031 Secondary School Teachers, Except Special and Vocational Education	884	998	12.9%	114	271	385	Bachelor's

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004 Employment	2004-2014			Total Openings	Minimum Education	Competitive Education
		2014 Employment	Percent Growth	Growth Openings			
Vocational Education Teachers, Secondary School	38	43	13.2%	5	12	Bachelor's	Master's
Special Education Teachers, Preschool, Kindergarten, and Elementary School	124	139	12.1%	15	33	Bachelor's	Master's
Special Education Teachers, Middle School	50	56	12.0%	6	13	Bachelor's	Master's
Special Education Teachers, Secondary School	66	76	15.2%	10	18	Bachelor's	Master's
Other Teachers and Instructors	229	269	17.5%	40	33	73	
Adult Literacy, Remedial Education, and GED Teachers and Instructors	41	49	19.5%	8	6	14	Master's
Self-Enrichment Education Teachers	91	105	15.4%	14	13	27	Post-sec.
Teachers and Instructors, All Other	97	115	18.6%	18	14	32	Master's
Librarians, Curators, and Archivists	174	194	11.5%	20	54	74	
Archivists	1	1	0.0%	0	0	0	Master's + Work Exp.
Curators	4	4	0.0%	0	1	1	Master's + Work Exp.
Museum Technicians and Conservators	3	3	0.0%	0	1	1	Master's + Work Exp.
Librarians	87	98	12.6%	11	23	34	Master's + Work Exp.
Library Technicians	79	88	11.4%	9	29	38	Master's + Work Exp.
Other Education, Training, and Library Occupations	1,785	1,996	11.8%	211	355	566	Moderate OJT Assoc.
Audio-Visual Specialists, Education-related	1	1	0.0%	0	0	0	Moderate OJT Assoc.
Farm and Home Management Advisors	3	5	66.7%	2	1	3	Post-sec.
Instructional Coordinators	101	108	6.9%	7	17	24	Bachelor's
Teacher Assistants	1,198	1,351	12.8%	153	256	409	Post-sec.
Education, Training, and Library, All Other	482	531	10.2%	49	81	130	Bachelor's + Work Exp.
Arts, Design, Entertainment, Sports, and Media Occupations	1,219	1,475	21.0%	256	253	509	
Art and Design Workers	296	363	22.6%	67	48	115	
Art Directors	9	12	33.3%	3	2	5	Master's
Craft Artists	2	4	100.0%	2	1	3	Moderate OJT
Fine Artists, Including Painters, Sculptors, and Illustrators	4	6	50.0%	2	1	3	Long OJT
Multi-Media Artists and Animators	12	14	16.7%	2	3	5	Bachelor's
Artists and Related Workers, All Other	3	3	0.0%	0	1	1	Master's
Commercial and Industrial Designers	28	31	10.7%	3	4	7	Bachelor's + Work Exp.
Fashion Designers	7	9	28.6%	2	1	3	Bachelor's + Work Exp.
Floral Designers	50	55	10.0%	5	7	12	Moderate OJT
Graphic Designers	117	146	24.8%	29	18	47	Bachelor's + Work Exp.
Interior Designers	9	12	33.3%	3	1	4	Bachelor's + Work Exp.
Merchandise Displayers and Window Trimmers	47	59	25.5%	12	7	19	Moderate OJT
Set and Exhibit Designers	5	7	40.0%	2	1	3	Bachelor's
Designers, All Other	3	5	66.7%	2	1	3	Post-sec.
Entertainers and Performers, Sports, and Related Workers	289	346	19.7%	57	59	116	Bachelor's
Actors	97	115	18.6%	18	14	32	Post-sec.
Producers and Directors	53	64	20.8%	11	9	20	Bachelor's + Work Exp.
Athletes and Sports Competitors	4	5	25.0%	1	1	2	Post-sec.
Coaches and Scouts	42	55	31.0%	13	10	23	Long OJT

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014					Minimum Education	Competitive Education
	2004 Employment	2014 Employment	Percent Growth	2014 Replacement Openings	Total Openings		
27-2023 Umpires, Referees, and Other Sports Officials	3	3	0.0%	0	1	Long OJT	Bachelor's
27-2031 Dancers	4	4	0.0%	0	2	Long OJT	Work Exp.
27-2032 Choreographers	5	7	40.0%	2	3	Work Exp.	Assoc.
27-2041 Music Directors and Composers	29	34	17.2%	5	7	Bachelor's	Master's
27-2042 Musicians and Singers	51	58	13.7%	7	12	Long OJT	Assoc.
27-2099 Entertainers and Performers, Sports and Related Workers, All Other	1	1	0.0%	0	0	Long OJT	Assoc.
27-3000 Media and Communication Workers	422	506	19.9%	84	92	176	Bachelor's
27-3011 Radio and Television Announcers	42	48	14.3%	6	11	17	Assoc.
27-3012 Public Address System and Other Announcers	6	8	33.3%	2	2	4	Bachelor's
27-3021 Broadcast News Analysts	32	37	15.6%	5	9	14	Bachelor's + Work Exp.
27-3022 Reporters and Correspondents	42	50	19.0%	8	11	19	Bachelor's + Work Exp.
27-3031 Public Relations Specialists	77	95	23.4%	18	13	31	Bachelor's + Work Exp.
27-3041 Editors	64	79	23.4%	15	18	33	Bachelor's + Work Exp.
27-3042 Technical Writers	19	25	31.6%	6	7	13	Bachelor's + Work Exp.
27-3043 Writers and Authors	36	45	25.0%	9	7	16	Bachelor's + Work Exp.
27-3091 Interpreters and Translators	41	48	17.1%	7	6	13	Bachelor's
27-3099 Media and Communication Workers, All Other	63	71	12.7%	8	8	16	Bachelor's
27-4000 Media and Communication Equipment Workers	212	260	22.6%	48	54	102	Bachelor's
27-4011 Audio and Video Equipment Technicians	34	44	29.4%	10	10	20	Post-sec.
27-4012 Broadcast Technicians	59	66	11.9%	7	15	22	Bachelor's
27-4014 Sound Engineering Technicians	8	10	25.0%	2	2	4	Post-sec. + Work Exp.
27-4021 Photographers	59	74	25.4%	15	14	29	Bachelor's
27-4031 Camera Operators, Television, Video, and Motion Picture Film and Video Editors	33	40	21.2%	7	8	15	Moderate OJT
27-4032 Film and Video Editors	4	7	75.0%	3	1	4	Assoc.
27-4099 Media and Communication Equipment Workers, All Other	15	19	26.7%	4	4	8	Moderate OJT
Health Care							
29-0000 Healthcare Practitioner and Technical Occupations	7,982	10,563	32.2%	2,571	1,748	4,319	1st Prof. + Work Exp.
29-1000 Health Diagnosing and Treating Practitioners	5,002	6,470	29.3%	1,468	1,139	2,607	1st Prof. + Work Exp.
29-1011 Chiropractors	3,171	4,098	29.2%	927	756	1,683	1st Prof. + Work Exp.
29-1021 Dentists, General	10	15	50.0%	5	3	8	1st Prof.
29-1029 Dentists, All Other	37	50	35.1%	13	8	21	1st Prof. + Work Exp.
29-1031 Dietitians and Nutritionists	32	43	34.4%	11	6	16	1st Prof. + Work Exp.
29-1041 Optometrists	12	16	33.3%	4	4	8	Bachelor's + Work Exp.
29-1051 Pharmacists	237	291	22.8%	54	52	106	1st Prof. + Work Exp.
29-1060 Physicians and Surgeons	302	395	30.8%	93	49	142	1st Prof. + Work Exp.
29-1071 Physician Assistants	48	71	47.9%	23	10	33	1st Prof. + Work Exp.
29-1081 Podiatrists	5	7	40.0%	2	1	3	Master's
29-1111 Registered Nurses	1,972	2,530	28.3%	558	493	1,051	1st Prof. + Work Exp.
29-1121 Audiologists	6	8	33.3%	2	2	4	Bachelor's
29-1122 Occupational Therapists	54	69	27.8%	15	9	24	PhD
29-1123 Physical Therapists	151	206	36.4%	55	19	74	Master's + Work Exp.

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014					Minimum Education	Competitive Education
	2004 Employment	2014 Employment	Percent Growth	Growth Openings	Replacement Openings		
29-1124 Radiation Therapists	14	18	28.6%	4	4	8 Assoc.	Bachelor's
29-1125 Recreational Therapists	16	23	43.8%	7	5	12 Bachelor's	Bachelor's + Work Exp.
29-1126 Respiratory Therapists	124	158	27.4%	34	47	81 Assoc.	Bachelor's
29-1127 Speech and Language Pathologists	37	48	29.7%	11	11	22 Masters	PhD
29-1131 Veterinarians	31	41	32.3%	10	9	19 1st Prof.	1st Prof. + Work Exp.
29-1199 Health Diagnosing and Treating Practitioners, All Other	56	72	28.6%	16	14	30 1st Prof.	1st Prof. + Work Exp.
29-2000 Health Technologists and Technicians	1,741	2,261	29.9%	520	362	882	Bachelor's + Work Exp.
29-2011 Medical and Clinical Laboratory Technologists	171	222	29.8%	51	54	105 Bachelor's	Bachelor's + Work Exp.
29-2012 Medical and Clinical Laboratory Technicians	114	151	32.5%	37	36	73 Assoc.	Assoc. + Work Exp.
29-2021 Dental Hygienists	149	207	38.9%	58	16	74 Assoc.	Assoc. + Work Exp.
29-2031 Cardiovascular Technologists and Technicians	58	77	32.8%	19	13	32 Assoc.	Assoc. + Work Exp.
29-2032 Diagnostic Medical Sonographers and Ultrasound Technologists	24	32	33.3%	8	5	13 Assoc.	Assoc. + Work Exp.
29-2033 Nuclear Medicine Technologists	10	13	30.0%	3	2	5 Assoc.	Bachelor's
29-2034 Radiologic, CAT, and MRI Technologists and Technicians	166	215	29.5%	49	37	86 Assoc.	Bachelor's
29-2041 Emergency Medical Technicians and Paramedics	112	148	32.1%	36	16	52 Post-sec.	Post-sec. + Work Exp.
29-2051 Dietetic Technicians	2	3	50.0%	1	0	1 Moderate OJT	Work Exp.
29-2052 Pharmacy Technicians	268	332	23.9%	64	41	105 Post-sec.	Post-sec.
29-2053 Psychiatric Technicians	14	17	21.4%	3	2	5 Post-sec.	Assoc.
29-2055 Surgical Technologists	69	87	26.1%	18	11	29 Post-sec.	Assoc.
29-2056 Veterinary Technologists and Technicians	46	61	32.6%	15	7	22 Assoc.	Assoc. + Work Exp.
29-2061 Licensed Practical and Licensed Vocational Nurses	278	355	27.7%	77	71	148 Post-sec.	Post-sec. + Work Exp.
29-2071 Medical Records and Health Information Technicians	126	162	28.6%	36	22	58 Assoc.	Assoc. + Work Exp.
29-2081 Opticians, Dispensing	61	85	39.3%	24	13	37 Long OJT	Post-sec.
29-2091 Orthotists and Prosthetists	0	1	NA	1	0	1 Bachelor's	Bachelor's + Work Exp.
29-2099 Health Technologists and Technicians, All Other	73	93	27.4%	20	16	36 Assoc.	Bachelor's
29-9000 Other Healthcare Practitioner and Technical Occupations	90	111	23.3%	21	21	42	Master's
29-9011 Occupational Health and Safety Specialists	11	15	36.4%	4	3	7 Bachelor's	Bachelor's + Work Exp.
29-9012 Occupational Health and Safety Technicians	14	16	14.3%	2	3	5 Bachelor's	Master's
29-9091 Athletic Trainers	19	23	21.1%	4	5	9 Bachelor's	Master's
29-9099 Healthcare Practitioner and Technical Workers, All Other	46	57	23.9%	11	10	21 Assoc.	Assoc. + Work Exp.
31-0000 Healthcare Support Occupations	2,990	4,093	36.9%	1,103	609	1,712	
31-1000 Nursing, Psychiatric, and Home Health Aides	1,450	1,930	33.1%	480	230	710	
31-1011 Home Health Aides	386	548	42.0%	162	64	226 Short OJT	Post-sec.
31-1012 Nursing Aides, Orderlies, and Attendants	1,063	1,381	29.9%	318	166	484 Short OJT	Work Exp.
31-1013 Psychiatric Aides	1	1	0.0%	0	0	0 Short OJT	Work Exp.
31-2000 Occupational and Physical Therapy Assistants and Aides	79	109	38.0%	30	16	46	Assoc. + Work Exp.
31-2011 Occupational Therapist Assistants	4	5	25.0%	1	1	2 Assoc.	Assoc. + Work Exp.
31-2021 Physical Therapist Assistants	39	52	33.3%	13	8	21 Assoc.	Assoc. + Work Exp.
31-2022 Physical Therapist Aides	36	52	44.4%	16	7	23 Moderate OJT	Assoc.
31-9000 Other Healthcare Support Occupations	1,461	2,054	40.6%	593	363	956	
31-9011 Massage Therapists	31	40	29.0%	9	7	16 Post-sec.	Post-sec. + Work Exp.

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014				Minimum Education	Competitive Education
	2004 Employment	2014 Employment	Percent Growth	Replacement Openings		
31-9091 Dental Assistants	293	402	37.2%	109	Moderate OJT	Post-sec.
31-9092 Medical Assistants	476	757	59.0%	281	Moderate OJT	Post-sec.
31-9093 Medical Equipment Preparers	84	111	32.1%	27	Short OJT	Work Exp.
31-9094 Medical Transcriptionists	184	242	31.5%	58	Post-sec.	Assoc.
31-9096 Veterinary Assistants and Laboratory Animal Caretakers	44	59	34.1%	15	Short OJT	Post-sec.
31-9099 Healthcare Support Workers, All Other	349	443	26.9%	94	Short OJT	Work Exp.
Service	17,406	21,360	22.7%	3,954		9,940
Protective Service Occupations	1,561	1,820	16.6%	259		777
33-1000 Supervisors, Protective Service Workers	118	134	13.6%	16		60
33-1012 Supervisors and Managers of Police and Detectives	57	64	12.3%	7	Work Exp.	Bachelor's
33-1021 Supervisors and Managers of Fire Fighting and Prevention Workers	38	44	15.8%	6	Work Exp.	Bachelor's + Work Exp.
33-1099 Supervisors and Managers, Protective Service Workers, All Other	23	26	13.0%	3	Work Exp.	Bachelor's
33-2000 Firefighting and Prevention Workers	274	328	19.7%	54		144
33-2011 Fire Fighters	244	293	20.1%	49	Long OJT	Assoc.
33-2021 Fire Inspectors and Investigators	9	11	22.2%	2	Long OJT	Assoc.
33-2022 Forest Fire Inspectors and Prevention Specialists	21	24	14.3%	3	Long OJT	Post-sec.
33-3000 Law Enforcement Workers	472	532	12.7%	60		186
33-3011 Bailiffs	3	4	33.3%	1	Moderate OJT	Post-sec.
33-3012 Correctional Officers	55	62	12.7%	7	Moderate OJT	Post-sec.
33-3021 Detectives and Criminal Investigators	35	39	11.4%	4	Work Exp.	Post-sec.
33-3031 Fish and Game Wardens	2	2	0.0%	0	Assoc.	Bachelor's
33-3041 Parking Enforcement Workers	32	36	12.5%	4	Short OJT	Work Exp.
33-3051 Police and Sheriff's Patrol Officers	345	389	12.8%	44	Work Exp.	Assoc.
33-9000 Other Protective Service Workers	697	826	18.5%	129		387
33-9011 Animal Control Workers	6	7	16.7%	1	Moderate OJT	Work Exp.
33-9021 Private Detectives and Investigators	32	39	21.9%	7	Moderate OJT	Work Exp.
33-9031 Gaming Surveillance Officers and Gaming Investigators	21	22	4.8%	1	Moderate OJT	Work Exp.
33-9032 Security Guards	317	395	24.6%	78	Short OJT	Post-sec.
33-9091 Crossing Guards	74	93	25.7%	19	Short OJT	Work Exp.
33-9092 Lifeguards, Ski Patrol, and Other Recreational Protective Service Workers	74	83	12.2%	9	Short OJT	Work Exp.
33-9099 Protective Service Workers, All Other	173	187	8.1%	14	Short OJT	Work Exp.
35-0000 Food Preparation and Serving Related Occupations	10,568	13,015	23.2%	2,447		6,657
35-1000 Supervisors, Food Preparation and Food Serving Workers	744	933	25.4%	189		386
35-1011 Chefs and Head Cooks	103	136	32.0%	33	Work Exp.	Post-sec.
35-1012 Supervisors and Managers of Food Preparation and Serving Workers	641	797	24.3%	156	Work Exp.	Post-sec.
35-2000 Cooks and Food Preparation Workers	2,971	3,576	20.4%	605		1,541
35-2011 Cooks, Fast Food	782	863	10.4%	81	Short OJT	Work Exp.
35-2012 Cooks, Institution and Cafeteria	289	320	10.7%	31	Long OJT	Work Exp.

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014					Minimum Education	Competitive Education
	2004 Employment	2014 Employment	Percent Growth	Replacement Openings	Total Openings		
39-2021 Nonfarm Animal Caretakers	140	173	23.6%	33	40	73	Post-sec.
39-3000 Entertainment Attendants and Related Workers	312	357	14.4%	45	105	150	Work Exp.
39-3012 Gaming and Sports Book Writers and Runners	9	10	11.1%	1	3	4	Short OJT
39-3019 Gaming Service Workers, All Other	7	7	0.0%	0	2	2	Short OJT
39-3021 Motion Picture Projectionists	13	13	0.0%	0	7	7	Short OJT
39-3031 Ushers, Lobby Attendants, and Ticket Takers	62	72	16.1%	10	31	41	Work Exp.
39-3091 Amusement and Recreation Attendants	124	146	17.7%	22	35	57	Work Exp.
39-3092 Costume Attendants	6	7	16.7%	1	2	3	Short OJT
39-3093 Locker Room, Coatroom, and Dressing Room Attendants	13	16	23.1%	3	4	7	Short OJT
39-3099 Entertainment Attendants and Related Workers, All Other	78	86	10.3%	8	21	29	Short OJT
39-4000 Funeral Service Workers	5	6	20.0%	1	1	2	Work Exp.
39-4021 Funeral Attendants	5	6	20.0%	1	1	2	Short OJT
39-5000 Personal Appearance Workers	251	295	17.5%	44	54	98	Work Exp.
39-5011 Barbers	13	15	15.4%	2	4	6	Post-sec.
39-5012 Hairdressers, Hairstylists, and Cosmetologists	215	253	17.7%	38	46	84	Post-sec.
39-5092 Manicurists and Pedicurists	7	8	14.3%	1	1	2	Post-sec.
39-5094 Skin Care Specialists	16	19	18.8%	3	3	6	Post-sec.
39-6000 Transportation, Tourism, and Lodging Attendants	80	98	22.5%	18	19	37	Work Exp.
39-6011 Baggage Porters and Bellhops	17	20	17.6%	3	5	8	Short OJT
39-6012 Concierges	5	6	20.0%	1	1	2	Work Exp.
39-6021 Tour Guides and Escorts	35	43	22.9%	8	10	18	Moderate OJT
39-6031 Flight Attendants	23	29	26.1%	6	3	9	Long OJT
39-9000 Other Personal Care and Service Workers	855	1,048	22.6%	193	209	402	Bachelor's
39-9011 Child Care Workers	288	348	20.8%	60	84	144	Post-sec.
39-9021 Personal and Home Care Aides	238	318	33.6%	80	45	125	Post-sec.
39-9031 Fitness Trainers and Aerobics Instructors	134	152	13.4%	18	33	51	Work Exp.
39-9032 Recreation Workers	65	86	32.3%	21	18	39	Bachelor's
39-9041 Residential Advisors	26	30	15.4%	4	6	10	Bachelor's
39-9099 Personal Care and Service Workers, All Other	104	114	9.6%	10	23	33	Post-sec.
Sales and Related							
41-0000 Sales and Related Occupations	11,968	14,176	18.4%	2,208	3,971	6,179	Work Exp.
41-1000 Supervisors, Sales and Related	11,968	14,176	18.4%	2,208	3,971	6,179	Work Exp.
41-1011 Supervisors and Managers of Retail Sales Workers	1,353	1,624	20.0%	271	280	551	Work Exp.
41-1012 Supervisors and Managers of Non-Retail Sales Workers	1,088	1,296	19.1%	208	222	430	Assoc.
41-2000 Retail Sales Workers	265	328	23.8%	63	58	121	Assoc.
41-2011 Cashiers	7,005	8,390	19.8%	1,385	2,863	4,248	Work Exp.
41-2012 Greeting Change Persons and Booth Cashiers	2,521	2,989	18.6%	468	1,164	1,632	Work Exp.
41-2021 Counter and Rental Clerks	9	13	44.4%	4	5	9	Short OJT
41-2022 Parts Salespersons	437	525	20.1%	88	168	256	Short OJT
41-2031 Retail Salespersons	288	343	19.1%	55	88	143	Moderate OJT
41-3000 Sales Representatives, Service	3,750	4,520	20.5%	770	1,438	2,208	Work Exp.
41-3011 Advertising Sales Agents	781	932	19.3%	151	160	311	Work Exp.
41-3011 Advertising Sales Agents	94	112	19.1%	18	21	39	Moderate OJT

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014					Minimum Education	Competitive Education
	2004 Employment	2014 Employment	Percent Growth	2014 Replacement Openings	Total Openings		
41-3021 Insurance Sales Agents	153	177	15.7%	24	40	Bachelor's	Bachelor's + Work Exp.
41-3031 Securities, Commodities, and Financial Services Sales Agents	214	270	26.2%	56	29	Bachelor's	Bachelor's + Work Exp.
41-3041 Travel Agents	75	72	-4.0%	-3	17	Post-sec.	Assoc.
41-3099 Sales Representatives, Services, All Other	245	301	22.9%	56	53	Moderate OJT	Post-sec.
41-4000 Sales Representatives, Wholesale and Manufacturing	1,075	1,218	13.3%	143	303	446	
41-4011 Wholesale and Manufacturing Sales Representatives; Technical and Scientific	170	205	20.6%	35	50	Moderate OJT	Bachelor's
41-4012 Wholesale and Manufacturing Sales Representatives Non-technical and Scientific	905	1,013	11.9%	108	253	Moderate OJT	Post-sec.
41-9000 Other Sales and Related Workers	1,754	2,012	14.7%	258	365	623	
41-9011 Demonstrators and Product Promoters	168	261	55.4%	93	48	141	Short OJT
41-9012 Models	3	3	0.0%	0	1	1	Moderate OJT
41-9021 Real Estate Brokers	148	162	9.5%	14	32	46	Post-sec. + Work Exp.
41-9022 Real Estate Sales Agents	672	729	8.5%	57	143	200	Post-sec. + Work Exp.
41-9031 Sales Engineers	10	11	10.0%	1	3	4	Bachelor's
41-9041 Telemarketers	580	630	8.6%	50	101	151	Short OJT
41-9091 Door-To-Door Sales Workers, News and Street Vendors, and Related Workers	5	7	40.0%	2	1	3	Short OJT
41-9099 Sales and Related Workers, All Other	168	209	24.4%	41	36	77	Short OJT
Office and Administrative Support	18,255	21,574	18.2%	3,319	4,464	7,783	
43-0000 Office and Administrative Support Occupations	18,255	21,574	18.2%	3,319	4,464	7,783	
43-1000 Supervisors, Office and Administrative Support Workers	996	1,121	12.6%	125	236	361	
43-1011 Supervisors and Managers of Office and Administrative Support Workers	996	1,121	12.6%	125	236	361	Work Exp.
43-2000 Communication Equipment Workers	169	194	14.8%	25	46	71	Assoc.
43-2011 Switchboard Operators, Including Answering Service	169	194	14.8%	25	46	71	Short OJT
43-3000 Financial Clerks	3,306	4,022	21.7%	716	815	1,531	
43-3011 Bill and Account Collectors	673	944	40.3%	271	156	427	Short OJT
43-3021 Billing and Posting Clerks	441	488	10.7%	47	81	128	Short OJT
43-3031 Bookkeeping, Accounting, and Auditing Clerks	1,639	1,936	18.1%	297	343	640	Moderate OJT
43-3051 Payroll and Timekeeping Clerks	164	199	21.3%	35	49	84	Short OJT
43-3061 Purchasing and Procurement Clerks	40	47	17.5%	7	11	18	Short OJT
43-3071 Tellers	349	408	16.9%	59	175	234	Short OJT
43-4000 Information and Record Clerks	4,447	5,404	21.5%	957	1,037	1,994	
43-4011 Brokerage Clerks	41	53	29.3%	12	6	18	Moderate OJT
43-4011 Correspondence Clerks	9	10	11.1%	1	3	4	Short OJT
43-4031 Court, Municipal, and License Clerks	116	128	10.3%	12	28	40	Short OJT
43-4041 Credit Authorizers, Checkers, and Clerks	46	59	28.3%	13	10	23	Short OJT
43-4051 Customer Service Representatives	1,524	2,012	32.0%	488	266	754	Moderate OJT
43-4061 Eligibility Interviewers, Government Programs	41	48	17.1%	7	12	19	Moderate OJT
43-4071 File Clerks	223	239	7.2%	16	68	84	Short OJT

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004 Employment	2004-2014			Minimum Education	Competitive Education		
		2014 Employment	Percent Growth	Replacement Openings				
43-4081 Hotel, Motel, and Resort Desk Clerks	153	192	25.5%	39	73	112	Short OJT	Work Exp.
43-4111 Interviewers, Except Eligibility and Loan	167	217	29.9%	50	50	100	Short OJT	Work Exp.
43-4121 Library Assistants, Clerical	107	120	12.1%	13	43	56	Short OJT	Post-sec.
43-4131 Loan Interviewers and Clerks	217	197	-9.2%	-20	30	10	Short OJT	Work Exp.
43-4141 New Accounts Clerks	94	110	17.0%	16	26	42	Work Exp.	Bachelor's
43-4151 Order Clerks	450	461	2.4%	11	102	113	Short OJT	Work Exp.
43-4161 Human Resources Assistants, Except Payroll and Timekeeping	81	99	22.2%	18	20	38	Short OJT	Work Exp.
43-4171 Receptionists and Information Clerks	939	1,188	26.5%	249	256	505	Short OJT	Work Exp.
43-4181 Reservation and Transportation Ticket Agents and Travel Clerks	17	19	11.8%	2	5	7	Short OJT	Post-sec.
43-4199 Information and Record Clerks, All Other	222	252	13.5%	30	39	69	Short OJT	Work Exp.
43-5000 Material Recording, Scheduling, Dispatching, and Distributing Workers	2,988	3,268	9.4%	280	854	1,134		
43-5011 Cargo and Freight Agents	18	23	27.8%	5	5	10	Moderate OJT	Work Exp.
43-5021 Couriers and Messengers	101	128	26.7%	27	26	53	Short OJT	Work Exp.
43-5031 Police, Fire, and Ambulance Dispatchers	66	74	12.1%	8	15	23	Moderate OJT	Work Exp.
43-5032 Dispatchers, Except Police, Fire, and Ambulance	229	279	21.8%	50	55	105	Moderate OJT	Work Exp.
43-5041 Meter Readers, Utilities	37	34	-8.1%	-3	11	8	Short OJT	Work Exp.
43-5051 Postal Service Clerks	56	60	7.1%	4	16	20	Short OJT	Post-sec.
43-5052 Postal Service Mail Carriers	236	250	5.9%	14	78	92	Short OJT	Work Exp.
43-5053 Postal Service Mail Sorters, Processors, and Processing Machine Operators	138	146	5.8%	8	39	47	Short OJT	Post-sec.
43-5061 Production, Planning, and Expediting Clerks	232	286	23.3%	54	64	118	Work Exp.	Post-sec.
43-5071 Shipping, Receiving, and Traffic Clerks	528	573	8.5%	45	114	159	Short OJT	Work Exp.
43-5081 Stock Clerks and Order Fillers	1,236	1,284	3.9%	48	401	449	Short OJT	Work Exp.
43-5111 Weighers, Measurers, Checkers, and Samplers, Recordkeeping	111	131	18.0%	20	30	50	Short OJT	Work Exp.
43-6000 Secretaries and Administrative Assistants	2,376	2,852	20.0%	476	520	996		
43-6011 Executive Secretaries and Administrative Assistants	662	788	19.0%	126	144	270	Moderate OJT	Assoc.
43-6012 Legal Secretaries	168	200	19.0%	32	37	69	Post-sec.	Assoc.
43-6013 Medical Secretaries	519	648	24.9%	129	116	245	Post-sec.	Assoc.
43-6014 Secretaries, Except Legal, Medical, and Executive	1,027	1,216	18.4%	189	223	412	Moderate OJT	Assoc.
43-9000 Other Office and Administrative Support Workers	3,973	4,713	18.6%	740	956	1,696		
43-9011 Computer Operators	46	44	-4.3%	-2	10	8	Moderate OJT	Post-sec.
43-9021 Data Entry Keyers	131	123	-6.1%	-8	30	22	Moderate OJT	Work Exp.
43-9022 Word Processors and Typists	63	61	-3.2%	-2	14	12	Moderate OJT	Post-sec.
43-9031 Desktop Publishers	42	51	21.4%	9	11	20	Post-sec.	Post-sec. + Work Exp.
43-9041 Insurance Claims and Policy Processing Clerks	225	261	16.0%	36	40	76	Moderate OJT	Post-sec.
43-9051 Mail Clerks and Mail Machine Operators, Except Postal Service	86	106	23.3%	20	28	48	Short OJT	Post-sec.
43-9061 Office Clerks, General	2,677	3,253	21.5%	576	656	1,232	Short OJT	Post-sec.

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014					Total	Minimum Education	Competitive Education
	2004 Employment	2014 Employment	Percent Growth	Growth Openings	Replacement Openings			
43-9071 Office Machine Operators, Except Computer	85	98	15.3%	13	23	36	Short OJT	Work Exp.
43-9081 Proofreaders and Copy Markers	2	3	50.0%	1	0	1	Short OJT	Work Exp.
43-9111 Statistical Assistants	6	7	16.7%	1	1	2	Moderate OJT	Post-sec.
43-9199 Office and Administrative Support Workers, All Other	610	706	15.7%	96	143	239	Short OJT	Work Exp.
45-0000 Farming, Fishing, and Forestry	2,197	2,567	16.8%	370	606	976		
45-1000 Farming, Fishing, and Forestry Occupations	2,197	2,567	16.8%	370	606	976		
45-1011 Supervisors, Farming, Fishing, and Forestry Workers	134	149	11.2%	15	33	48		
45-1011 Supervisors and Managers of Farming, Fishing, and Forestry Workers	124	137	10.5%	13	30	43	Work Exp.	Work Exp.
45-1012 Farm Labor Contractors	10	12	20.0%	2	3	5	Work Exp.	Work Exp.
45-2000 Agricultural Workers	1,410	1,646	16.7%	236	416	652		
45-2011 Agricultural Inspectors	7	9	28.6%	2	2	4	Bachelor's	Bachelor's + Work Exp.
45-2021 Animal Breeders	10	12	20.0%	2	2	4	Moderate OJT	Work Exp.
45-2041 Graders and Sorters, Agricultural Products	90	111	23.3%	21	27	48	Short OJT	Work Exp.
45-2091 Agricultural Equipment Operators	130	147	13.1%	17	38	55	Short OJT	Work Exp.
45-2092 Farmworkers and Laborers for Crops, Nurseries, and Greenhouses	986	1,141	15.7%	155	291	446	Short OJT	Work Exp.
45-2093 Farmworkers, Farm and Ranch Animals	167	201	20.4%	34	50	84	Short OJT	Work Exp.
45-2099 Agricultural Workers, All Other	20	25	25.0%	5	6	11	Short OJT	Work Exp.
45-3000 Fishing and Hunting Workers	4	5	25.0%	1	1	2	Short OJT	Work Exp.
45-3011 Fishers and Related Fishing Workers	4	5	25.0%	1	1	2	Short OJT	Work Exp.
45-4000 Forest, Conservation, and Logging Workers	649	767	18.2%	118	156	274	Short OJT	Work Exp.
45-4011 Forest and Conservation Workers	347	451	30.0%	104	98	202	Short OJT	Work Exp.
45-4021 Fallers and Buckers	18	18	0.0%	0	3	3	Moderate OJT	Work Exp.
45-4022 Logging Equipment Operators	121	123	1.7%	2	23	25	Moderate OJT	Work Exp.
45-4023 Log Graders and Scalpers	8	9	12.5%	1	2	3	Moderate OJT	Work Exp.
45-4029 Logging Workers, All Other	155	166	7.1%	11	30	41	Moderate OJT	Work Exp.
47-0000 Construction and Extraction Occupations	5,233	6,370	21.7%	1,137	1,170	2,307		
47-1000 Supervisors, Construction and Extraction Workers	5,233	6,370	21.7%	1,137	1,170	2,307		
47-1011 Supervisors and Managers of Construction Trades and Extraction Workers	426	527	23.7%	101	85	186	Work Exp.	Bachelor's
47-2000 Construction Trades Workers	4,104	4,998	21.8%	894	886	1,780		
47-2021 Brickmasons and Blockmasons	92	114	23.9%	22	16	38	Long OJT	Post-sec.
47-2022 Stonemasons	16	19	18.8%	3	3	6	Long OJT	Post-sec.
47-2031 Carpenters	792	986	24.5%	194	150	344	Long OJT	Post-sec.
47-2041 Carpet Installers	64	76	18.8%	12	12	24	Moderate OJT	Work Exp.
47-2042 Floor Layers, Except Carpet, Wood, and Hard Tiles	6	7	16.7%	1	1	2	Moderate OJT	Work Exp.
47-2043 Floor Sanders and Finishers	6	8	33.3%	2	1	3	Moderate OJT	Work Exp.
47-2044 Tile and Marble Setters	9	13	44.4%	4	2	6	Long OJT	Work Exp.
47-2051 Cement Masons and Concrete Finishers	167	206	23.4%	39	39	78	Long OJT	Work Exp.
47-2061 Construction Laborers	752	930	23.7%	178	115	293	Short OJT	Work Exp.

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014				Minimum Education	Competitive Education
	2004 Employment	2014 Employment	Percent Growth	Replacement Openings		
47-2071 Paving, Surfacing, and Tamping Equipment Operators	23	28	21.7%	4	Moderate OJT	Work Exp.
47-2072 Pile-Driver Operators	2	3	50.0%	1	Post-sec.	Post-sec. + Work Exp.
47-2073 Operating Engineers and Other Construction Equipment Operators	476	562	18.1%	135	Moderate OJT	Work Exp.
47-2081 Drywall and Ceiling Tile Installers	104	128	23.1%	24	Post-sec.	Post-sec. + Work Exp.
47-2082 Tapers	47	57	21.3%	10	Moderate OJT	Work Exp.
47-2111 Electricians	422	498	18.0%	76	Post-sec.	Post-sec. + Work Exp.
47-2121 Glaziers	63	77	22.2%	14	Long OJT	Work Exp.
47-2131 Insulation Workers, Floor, Ceiling, and Wall	50	62	24.0%	12	Long OJT	Work Exp.
47-2141 Painters, Construction and Maintenance	231	283	22.5%	52	Long OJT	Work Exp.
47-2142 Paperhangers	4	5	25.0%	1	Moderate OJT	Work Exp.
47-2151 Pipelayers	79	93	17.7%	14	Moderate OJT	Work Exp.
47-2152 Plumbers, Pipefitters, and Steamfitter	197	235	19.3%	38	Post-sec.	Post-sec. + Work Exp.
47-2161 Plasterers and Stucco Masons	17	21	23.5%	4	Long OJT	Work Exp.
47-2181 Roofers	173	216	24.9%	43	Moderate OJT	Work Exp.
47-2211 Sheet Metal Workers	297	355	19.5%	58	Post-sec.	Post-sec. + Work Exp.
47-2221 Structural Iron and Steel Workers	15	16	6.7%	1	Post-sec.	Post-sec. + Work Exp.
47-3000 Helpers, Construction Trades	225	283	25.8%	58		
47-3011 Brickmason's, Blockmason's, Stonemason's, and Tile and Marble Setter's Helpers	41	52	26.8%	11	Short OJT	Work Exp.
47-3012 Carpenter's Helpers	41	52	26.8%	11	Short OJT	Work Exp.
47-3013 Electrician's Helpers	22	27	22.7%	5	Short OJT	Work Exp.
47-3014 Painter's, Paperhanger's, Plasterer's, and Stucco Mason's Helpers	35	45	28.6%	10	Short OJT	Work Exp.
47-3015 Pipelayers, Plumbers, Pipefitters, and Steamfitter's Helpers	16	20	25.0%	4	Short OJT	Work Exp.
47-3016 Roofer's Helpers	19	23	21.1%	4	Short OJT	Work Exp.
47-3019 Construction Trades' Helpers, All Other	51	64	25.5%	13	Short OJT	Work Exp.
47-4000 Other Construction and Related Workers	442	519	17.4%	77		
47-4011 Construction and Building Inspectors	42	47	11.9%	5	Work Exp.	Assoc.
47-4031 Fence Erectors	109	133	22.0%	24	Moderate OJT	Work Exp.
47-4041 Hazardous Materials Removal Workers	38	49	28.9%	11	Moderate OJT	Work Exp.
47-4051 Highway Maintenance Workers	179	202	12.8%	23	Moderate OJT	Work Exp.
47-4061 Rail-Track Laying and Maintenance Equipment Operators	2	2	0.0%	0	Moderate OJT	Work Exp.
47-4071 Septic Tank Servicers and Sewer Pipe Cleaners	15	20	33.3%	5	Moderate OJT	Work Exp.
47-4099 Construction and Related Workers, All Other	57	66	15.8%	9	Moderate OJT	Work Exp.
47-5000 Extraction Workers	36	43	19.4%	7	Moderate OJT	Work Exp.
47-5021 Earth Drillers, Water and Construction	17	20	17.6%	3	Moderate OJT	Work Exp.
47-5081 Extraction Worker's Helpers	19	23	21.1%	4	Short OJT	Work Exp.
49-0000 Installation, Maintenance, and Repair	4,134	4,847	17.2%	713		
49-1000 Installation, Maintenance, and Repair Occupations	4,134	4,847	17.2%	713		
49-1000 Supervisors, Installation, Maintenance, and Repair Workers	305	352	15.4%	47		
Total	23	28	21.7%	4	9	9
	2	3	50.0%	1	1	1
	476	562	18.1%	135	221	221
	104	128	23.1%	24	50	50
	47	57	21.3%	10	22	22
	422	498	18.0%	76	169	169
	63	77	22.2%	14	29	29
	50	62	24.0%	12	29	29
	231	283	22.5%	52	93	93
	4	5	25.0%	1	2	2
	79	93	17.7%	14	34	34
	197	235	19.3%	38	89	89
	17	21	23.5%	4	8	8
	173	216	24.9%	43	89	89
	297	355	19.5%	58	137	137
	15	16	6.7%	1	4	4
	225	283	25.8%	58	163	163
	41	52	26.8%	11	30	30
	41	52	26.8%	11	30	30
	22	27	22.7%	5	15	15
	35	45	28.6%	10	27	27
	16	20	25.0%	4	11	11
	19	23	21.1%	4	13	13
	51	64	25.5%	13	37	37
	442	519	17.4%	77	161	161
	42	47	11.9%	5	15	15
	109	133	22.0%	24	43	43
	38	49	28.9%	11	23	23
	179	202	12.8%	23	51	51
	2	2	0.0%	0	0	0
	15	20	33.3%	5	10	10
	57	66	15.8%	9	19	19
	36	43	19.4%	7	17	17
	17	20	17.6%	3	7	7
	19	23	21.1%	4	10	10
	4,134	4,847	17.2%	713	1,817	1,817
	4,134	4,847	17.2%	713	1,817	1,817
	305	352	15.4%	47	132	132

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014				Minimum Education	Competitive Education		
	2004 Employment	2014 Employment	Percent Growth	Replacement Openings				
49-1011 Supervisors and Managers of Mechanics, Installers, and Repairers	305	352	15.4%	47	85	132	Work Exp.	Assoc.
49-2000 Electrical and Electronic Equipment Mechanics, Installers, and Repairers	381	407	6.8%	26	80	106	Post-sec.	Assoc.
49-2011 Computer, Automated Teller, and Office Machine Radio Mechanics	83	102	22.9%	19	12	31	Post-sec.	Post-sec. + Work Exp.
49-2021 Telecommunications Equipment Installers and Repairers, Except Line Installers	23	17	-26.1%	-6	4	-2	Post-sec.	Assoc.
49-2022 Avionics Technicians	175	170	-2.9%	-5	38	33	Post-sec.	Assoc.
49-2091 Electric Motor, Power Tool, and Related Repairers	5	8	60.0%	3	2	5	Post-sec.	Assoc.
49-2092 Electrical and Electronics Installers and Repairers, Except Line Installers	18	22	22.2%	4	5	9	Long OJT	Post-sec.
49-2093 Transportation Equipment	5	6	20.0%	1	1	2	Post-sec.	Post-sec. + Work Exp.
49-2094 Industrial Equipment	21	21	0.0%	0	5	5	Post-sec.	Assoc.
49-2095 Electrical and Electronics Repairers, Powerhouse, Substation, and Relay	15	16	6.7%	1	4	5	Post-sec.	Post-sec. + Work Exp.
49-2096 Electronic Equipment Installers and Repairers, Motor Vehicles	18	22	22.2%	4	5	9	Post-sec.	Post-sec. + Work Exp.
49-2097 Electronic Home Entertainment Equipment Installers and Repairers	10	12	20.0%	2	2	4	Post-sec.	Post-sec. + Work Exp.
49-2098 Security and Fire Alarm Systems Installers	8	11	37.5%	3	2	5	Long OJT	Work Exp.
49-3000 Vehicle and Mobile Equipment Mechanics, Installers, and Repairers	1,589	1,880	18.3%	291	476	767		
49-3011 Aircraft Mechanics and Service Technicians	154	177	14.9%	23	40	63	Post-sec.	Assoc.
49-3021 Automotive Body and Related Repairers	131	160	22.1%	29	30	59	Long OJT	Assoc.
49-3022 Automotive Glass Installers and Repairers	8	10	25.0%	2	2	4	Moderate OJT	Assoc.
49-3023 Automotive Service Technicians and Mechanics	519	621	19.7%	102	153	255	Post-sec.	Assoc.
49-3031 Bus and Truck Mechanics and Diesel Engine Specialists	249	292	17.3%	43	71	114	Long OJT	Post-sec.
49-3041 Farm Equipment Mechanics	57	65	14.0%	8	14	22	Long OJT	Post-sec.
49-3042 Mobile Heavy Equipment Mechanics, Except Engines	134	153	14.2%	19	32	51	Long OJT	Post-sec.
49-3043 Rail Car Repairers	2	2	0.0%	0	0	0	Long OJT	Work Exp.
49-3051 Motorboat Mechanics	19	17	-10.5%	-2	5	3	Long OJT	Work Exp.
49-3052 Motorcycle Mechanics	33	39	18.2%	6	9	15	Long OJT	Post-sec.
49-3053 Outdoor Power Equipment and Other Small Engine Mechanics	22	30	36.4%	8	7	15	Moderate OJT	Post-sec.
49-3091 Bicycle Repairers	16	19	18.8%	3	7	10	Moderate OJT	Work Exp.
49-3092 Recreational Vehicle Service Technicians	12	15	25.0%	3	5	8	Long OJT	Work Exp.
49-3093 Tire Repairers and Changers	233	280	20.2%	47	101	148	Short OJT	Work Exp.
49-9000 Other Installation, Maintenance, and Repair Occupations	1,859	2,208	18.8%	349	463	812		
49-9011 Mechanical Door Repairers	22	26	18.2%	4	6	10	Moderate OJT	Post-sec.
49-9012 Control and Valve Installers and Repairers, Except Mechanical Door	11	13	18.2%	2	3	5	Moderate OJT	Work Exp.

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014					Minimum Education	Competitive Education
	2004 Employment	2014 Employment	Percent Growth	Replacement Openings	Total Openings		
49-9021 Heating, Air Conditioning, and Refrigeration Mechanics and Installers	101	133	31.7%	32	16	Long OJT	Post-sec.
49-9031 Home Appliance Repairers	43	51	18.6%	8	11	Long OJT	Post-sec.
49-9041 Industrial Machinery Mechanics	133	164	23.3%	31	31	Post-sec.	Post-sec. + Work Exp.
49-9042 Maintenance and Repair Workers, General	774	934	20.7%	160	169	Long OJT	Assoc.
49-9043 Maintenance Workers, Machinery	32	34	6.3%	2	7	Long OJT	Assoc.
49-9044 Millwrights	48	48	0.0%	0	12	Post-sec.	Post-sec. + Work Exp.
49-9051 Electrical Power-Line Installers and Repairers	59	63	6.8%	4	20	Post-sec.	Post-sec. + Work Exp.
49-9052 Telecommunications Line Installers and Repairers	66	72	9.1%	6	19	Long OJT	Post-sec.
49-9061 Camera and Photographic Equipment Repairers	4	6	50.0%	2	1	Moderate OJT	Work Exp.
49-9062 Medical Equipment Repairers	26	32	23.1%	6	8	Post-sec.	Post-sec. + Work Exp.
49-9063 Musical Instrument Repairers and Tuners	9	11	22.2%	2	3	Long OJT	Assoc.
49-9069 Precision Instrument and Equipment Repairers, All Other	10	10	0.0%	0	3	Long OJT	Post-sec.
49-9091 Coin, Vending, and Amusement Machine Servicers and Repairers	34	35	2.9%	1	8	Moderate OJT	Work Exp.
49-9093 Fabric Menders, Except Garment	4	4	0.0%	0	1	Moderate OJT	Work Exp.
49-9094 Locksmiths and Safe Repairers	30	39	30.0%	9	12	Moderate OJT	Work Exp.
49-9095 Manufactured Building and Mobile Home Installers	4	5	25.0%	1	1	Moderate OJT	Work Exp.
49-9096 Riggers	18	22	22.2%	4	5	Short OJT	Work Exp.
49-9097 Signal and Track Switch Repairers	2	2	0.0%	0	1	Post-sec.	Post-sec. + Work Exp.
49-9098 Installation, Maintenance, and Repair Workers' Helpers	170	205	20.6%	35	61	Short OJT	Work Exp.
49-9099 Installation, Maintenance, and Repair Workers, All Other	259	299	15.4%	40	65	Long OJT	Post-sec.
Production	7,437	8,253	11.0%	816	1,935		
51-0000 Production Occupations	7,437	8,253	11.0%	816	1,935		
51-1000 Supervisors, Production Workers	548	605	10.4%	57	125		
51-1011 Supervisors and Managers of Production and Operating Workers	548	605	10.4%	57	125	Work Exp.	Bachelor's
51-2000 Assemblers and Fabricators	1,183	1,262	6.7%	79	312		
51-2021 Coil Winders, Tapers, and Finishers	16	18	12.5%	2	4	Short OJT	Work Exp.
51-2022 Electrical and Electronic Equipment Assemblers	220	229	4.1%	9	54	Short OJT	Work Exp.
51-2023 Electromechanical Equipment Assemblers	11	13	18.2%	2	3	Short OJT	Work Exp.
51-2031 Engine and Other Machine Assemblers	12	12	0.0%	0	3	Short OJT	Work Exp.
51-2041 Structural Metal Fabricators and Fitters	66	82	24.2%	16	18	Long OJT	Work Exp.
51-2091 Fiberglass Laminators and Fabricators	2	2	0.0%	0	1	Moderate OJT	Work Exp.
51-2092 Assemblers, Multi-task or Team	447	505	13.0%	58	124	Moderate OJT	Work Exp.
51-2099 Assemblers and Fabricators, All Other	409	401	-2.0%	-8	105	Moderate OJT	Work Exp.
51-3000 Food Processing Workers	556	556	18.0%	100	139	Moderate OJT	Work Exp.
51-3011 Bakers	173	205	18.5%	32	43	Long OJT	Work Exp.
51-3021 Butchers and Meat Cutters	167	189	13.2%	22	39	Long OJT	Post-sec.
51-3022 Meat, Poultry, and Fish Cutters and Trimmers	33	37	12.1%	4	8	Short OJT	Work Exp.
51-3023 Slaughterers and Meat Packers	19	18	-5.3%	-1	4	Moderate OJT	Work Exp.
51-3091 Food Roasting, Baking, and Drying Machine Operators and Tenders	12	19	58.3%	7	4	Short OJT	Work Exp.

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014				Minimum Education	Competitive Education
	2004 Employment	2014 Employment	Percent Growth	Replacement Openings		
51-3092 Food Mixing and Blending Machine Operators and Tenders	139	171	23.0%	38	70	Work Exp.
51-3093 Food Cooking Machine Operators and Tenders	13	17	30.8%	4	7	Work Exp.
51-4000 Metal Workers and Plastic Workers	852	996	16.9%	144	383	
51-4011 Computer-Controlled Machine Tool Operators, Metal and Plastic	56	63	12.5%	7	17	Post-sec.
51-4012 Numerical Tool and Process Control Programmers	2	2	0.0%	0	0	Post-sec. + Work Exp.
51-4021 Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic	24	28	16.7%	4	13	Moderate OJT Work Exp.
51-4022 Forging Machine Setters, Operators, and Tenders, Metal and Plastic	2	2	0.0%	0	0	Moderate OJT Work Exp.
51-4031 Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	101	116	14.9%	15	41	Moderate OJT Work Exp.
51-4032 Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic	64	75	17.2%	11	32	Moderate OJT Work Exp.
51-4033 Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic	26	31	19.2%	5	11	Moderate OJT Work Exp.
51-4034 Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic	22	24	9.1%	2	7	Moderate OJT Work Exp.
51-4035 Milling and Planing Machine Setters, Operators, and Tenders, Metal and Plastic	5	5	0.0%	0	1	Moderate OJT Work Exp.
51-4041 Machinists	129	150	16.3%	21	54	Long OJT Post-sec.
51-4062 Patternmakers, Metal and Plastic	2	2	0.0%	0	1	Long OJT Work Exp.
51-4071 Foundry Mold Makers and Coremakers	11	12	9.1%	1	4	Moderate OJT Post-sec.
51-4072 Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	40	47	17.5%	7	18	Moderate OJT Post-sec.
51-4081 Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	22	27	22.7%	5	12	Moderate OJT Post-sec.
51-4111 Tool and Die Makers	24	30	25.0%	6	12	Long OJT Post-sec.
51-4121 Welders, Cutters, Solderers, and Brazers	237	285	20.3%	48	123	Long OJT Post-sec.
51-4122 Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	7	9	28.6%	2	4	Moderate OJT Post-sec.
51-4192 Lay-Out Workers, Metal and Plastic	3	4	33.3%	1	2	Long OJT Work Exp.
51-4193 Plating and Coating Machine Setters, Operators, and Tenders, Metal and Plastic	31	37	19.4%	6	14	Moderate OJT Post-sec.
51-4194 Tool Grinders, Filers, and Sharpeners	27	26	-3.7%	-1	8	Long OJT Work Exp.
51-4199 Metal Workers and Plastic Workers, All Other	17	21	23.5%	4	9	Moderate OJT Post-sec.
51-5000 Printing Workers	311	338	8.7%	27	105	
51-5011 Bindery Workers	70	80	14.3%	10	30	Moderate OJT Work Exp.
51-5012 Bookbinders	1	1	0.0%	0	0	Moderate OJT Work Exp.
51-5021 Job Printers	10	10	0.0%	0	2	Long OJT Work Exp.
51-5022 Prepress Technicians and Workers	53	49	-7.5%	-4	8	Long OJT Post-sec.
51-5023 Printing Press Machine Operators	177	198	11.9%	21	65	Moderate OJT Work Exp.

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014					Total Openings	Minimum Education	Competitive Education
	2004 Employment	2014 Employment	Percent Growth	Growth Openings	Replacement Openings			
51-6000 Textile, Apparel, and Furnishings Workers	344	392	14.0%	48	79	127		
51-6011 Laundry and Dry-Cleaning Workers	139	167	20.1%	28	41	69	Moderate OJT	Work Exp.
51-6021 Pressers, Textile, Garment, and Related Materials	20	24	20.0%	4	4	8	Short OJT	Work Exp.
51-6031 Sewing Machine Operators	118	129	9.3%	11	16	27	Moderate OJT	Work Exp.
51-6041 Shoe and Leather Workers and Repairers	5	5	0.0%	0	2	2	Long OJT	Work Exp.
51-6051 Sewers, Hand	2	2	0.0%	0	0	0	Short OJT	Work Exp.
51-6052 Tailors, Dressmakers, and Custom Sewers	22	25	13.6%	3	4	7	Work Exp.	Post-sec.
51-6062 Textile Cutting Machine Setters, Operators, and Tenders	3	3	0.0%	0	1	1	Moderate OJT	Work Exp.
51-6092 Fabric and Apparel Patternmakers	14	14	0.0%	0	6	6	Long OJT	Work Exp.
51-6093 Upholsterers	20	22	10.0%	2	5	7	Long OJT	Work Exp.
51-6099 Textile, Apparel, and Furnishings Workers, All Other	1	1	0.0%	0	0	0	Moderate OJT	Work Exp.
51-7000 Woodworkers	1,184	1,169	-1.3%	-15	307	292		
51-7011 Cabinetmakers and Bench Carpenters	271	292	7.7%	21	69	90	Long OJT	Work Exp.
51-7021 Furniture Finishers	69	74	7.2%	5	15	20	Long OJT	Work Exp.
51-7041 Sawing Machine Setters, Operators, and Tenders, Wood	182	168	-7.7%	-14	48	34	Moderate OJT	Work Exp.
51-7042 Woodworking Machine Setters, Operators, and Tenders,	561	524	-6.6%	-37	144	107	Moderate OJT	Post-sec.
51-7099 Woodworkers, All Other	101	111	9.9%	10	31	41	Moderate OJT	Work Exp.
51-8000 Plant and System Operators	87	93	6.9%	6	25	31		
51-8012 Power Distributors and Dispatchers	7	7	0.0%	0	2	2	Long OJT	Post-sec.
51-8013 Power Plant Operators	10	8	-20.0%	-2	3	1	Long OJT	Post-sec.
51-8021 Stationary Engineers and Boiler Operators	22	23	4.5%	1	4	5	Long OJT	Work Exp.
51-8031 Water and Liquid Waste Treatment Plant and System Operators	39	45	15.4%	6	14	20	Long OJT	Post-sec.
51-8091 Chemical Plant and System Operators	1	1	0.0%	0	0	0	Long OJT	Post-sec.
51-8092 Gas Plant Operators	1	1	0.0%	0	0	0	Long OJT	Post-sec.
51-8099 Plant and System Operators, All Other	7	8	14.3%	1	2	3	Long OJT	Post-sec.
51-9000 Other Production Occupations	2,372	2,742	15.6%	370	631	1,001		
51-9011 Chemical Equipment Operators and Tenders	12	14	16.7%	2	4	6	Moderate OJT	Work Exp.
51-9012 Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	39	46	17.9%	7	14	21	Moderate OJT	Work Exp.
51-9021 Crushing, Grinding, and Polishing Machine Setters, Operators, and Tenders	75	92	22.7%	17	22	39	Moderate OJT	Work Exp.
51-9022 Grinding and Polishing Workers, Hand	46	54	17.4%	8	13	21	Moderate OJT	Work Exp.
51-9023 Mixing and Blending Machine Setters, Operators, and Tenders	71	84	18.3%	13	20	33	Moderate OJT	Work Exp.
51-9031 Cutters and Trimmers, Hand	18	19	5.6%	1	4	5	Short OJT	Work Exp.
51-9032 Cutting and Slicing Machine Setters, Operators, and Tenders	19	20	5.3%	1	4	5	Moderate OJT	Work Exp.
51-9041 Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	130	135	3.8%	5	35	40	Moderate OJT	Work Exp.
51-9051 Furnace, Kiln, Oven, Drier, and Kettle Operators and Inspectors, Testers, Sorters, Samplers, and Weighers	48	48	0.0%	0	12	12	Moderate OJT	Work Exp.
51-9061	313	368	17.6%	55	79	134	Moderate OJT	Work Exp.

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014					Minimum Education	Competitive Education
	2004 Employment	2014 Employment	Percent Growth	2004-2014			
				Growth Openings	Replacement Openings		
						Total Openings	
51-9071 Jewelers and Precious Stone and Metal Workers	40	43	7.5%	3	9	12	Post-sec. + Work Exp.
51-9081 Dental Laboratory Technicians	65	83	27.7%	18	17	35	Post-sec.
51-9082 Medical Appliance Technicians	6	7	16.7%	1	1	2	Post-sec.
51-9083 Ophthalmic Laboratory Technicians	36	40	11.1%	4	9	13	Moderate OJT
51-9111 Packaging and Filling Machine Operators and Tenders	217	256	18.0%	39	47	86	Short OJT
51-9121 Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	67	72	7.5%	5	18	23	Moderate OJT
51-9122 Painters, Transportation Equipment	63	77	22.2%	14	18	32	Moderate OJT
51-9123 Painting, Coating, and Decorating Workers	108	121	12.0%	13	30	43	Long OJT
51-9131 Photographic Process Workers	24	26	8.3%	2	6	8	Moderate OJT
51-9132 Photographic Processing Machine Operators	33	38	15.2%	5	9	14	Short OJT
51-9191 Cementing and Gluing Machine Operators and Tenders	109	107	-1.8%	-2	30	28	Moderate OJT
51-9192 Cleaning, Washing, and Pickling Equipment Operators and Tenders	13	13	0.0%	0	4	4	Moderate OJT
51-9193 Cooling and Freezing Equipment Operators and Tenders	1	2	100.0%	1	0	1	Moderate OJT
51-9194 Etchers and Engravers	28	30	7.1%	2	8	10	Long OJT
51-9195 Molders, Shapers, and Casters, Except Metal and Plastic	55	65	18.2%	10	14	24	Moderate OJT
51-9196 Paper Goods Machine Setters, Operators, and Tenders	1	2	100.0%	1	0	1	Moderate OJT
51-9198 Production Worker's Helpers	263	327	24.3%	64	81	145	Short OJT
51-9199 Production Workers, All Other	472	553	17.2%	81	123	204	Moderate OJT
Transportation and Material Moving	8,809	10,394	18.0%	1,585	2,227	3,812	
53-0000 Transportation and Material Moving Occupations	8,809	10,394	18.0%	1,585	2,227	3,812	
53-1000 Supervisors, Transportation and Material Moving Workers	214	258	20.6%	44	57	101	
53-1021 Supervisors and Managers of Transportation Helpers, Laborers, and Material Movers, Hand	91	107	17.6%	16	24	40	Work Exp.
53-1031 Supervisors and Managers of Transportation and Material-Moving Machine and Vehicle Operators	123	151	22.8%	28	33	61	Work Exp.
53-2000 Air Transportation Workers	89	104	16.9%	15	26	41	
53-2011 Airline Pilots, Copilots, and Flight Engineers	17	22	29.4%	5	5	10	Post-sec.
53-2012 Commercial Pilots, Exclude Airline Pilots	71	81	14.1%	10	21	31	Post-sec.
53-2022 Airfield Operations Specialists	1	1	0.0%	0	0	0	Short OJT
53-3000 Motor Vehicle Operators	3,595	4,269	18.7%	674	629	1,303	
53-3011 Ambulance Drivers and Attendants, Except Emergency Medical Technicians	3	4	33.3%	1	0	1	Moderate OJT
53-3021 Bus Drivers, Transit and Intercity	53	64	20.8%	11	13	24	Moderate OJT
53-3022 Bus Drivers, School	360	411	14.2%	51	86	137	Short OJT
53-3031 Driver/Sales Workers	551	653	18.5%	102	102	204	Short OJT
53-3032 Truck Drivers, Heavy and Tractor-Trailer	1,841	2,163	17.5%	322	338	660	Moderate OJT
53-3033 Truck Drivers, Light or Delivery Services	590	734	24.4%	144	64	208	Short OJT
53-3041 Taxi Drivers and Chauffeurs	101	125	23.8%	24	11	35	Short OJT
53-3099 Motor Vehicle Operators, All Other	96	115	19.8%	19	15	34	Short OJT
53-4000 Rail Transportation Workers	24	23	-4.2%	-1	7	6	

Occupational Employment Projections, 2004-2014

Region 8 (Jackson and Josephine counties)

Standard Occupational Classification Code and Title	2004-2014				Minimum Education	Competitive Education
	2004 Employment	2014 Employment	Percent Growth	2014 Replacement Openings		
53-4011 Locomotive Engineers	9	8	-11.1%	3	2	Moderate OJT Work Exp.
53-4021 Railroad Brake, Signal, and Switch Operators	6	6	0.0%	1	1	Moderate OJT Work Exp.
53-4031 Railroad Conductors and Yardmasters	9	9	0.0%	3	3	Moderate OJT Work Exp.
53-5000 Water Transportation Workers	27	33	22.2%	10	16	Work Exp.
53-5011 Sailors and Marine Oilers	13	15	15.4%	2	7	Short OJT
53-5021 Captains, Mates, and Pilots of Water Vessels	6	7	16.7%	1	3	Long OJT
53-5022 Motorboat Operators	8	11	37.5%	3	6	Moderate OJT Work Exp.
53-6000 Other Transportation Workers	670	791	18.1%	121	406	Work Exp.
53-6021 Parking Lot Attendants	61	76	24.6%	15	34	Short OJT
53-6031 Service Station Attendants	572	672	17.5%	100	356	Short OJT
53-6041 Traffic Technicians	1	1	0.0%	0	0	Post-sec.
53-6051 Transportation Inspectors	17	18	5.9%	1	5	Bachelor's
53-6099 Transportation Workers, All Other	19	24	26.3%	5	11	Work Exp.
53-7000 Material Moving Workers	4,190	4,916	17.3%	726	1,939	Short OJT
53-7011 Conveyor Operators and Tenders	34	34	0.0%	0	10	Short OJT
53-7021 Crane and Tower Operators	12	14	16.7%	2	5	Moderate OJT Work Exp.
53-7032 Excavating and Loading Machine and Drapine Operators	83	104	25.3%	21	47	Moderate OJT Work Exp.
53-7041 Hoist and Winch Operators	73	82	12.3%	9	34	Moderate OJT Work Exp.
53-7051 Fork Lift, Industrial Truck and Tractor Operators	555	621	11.9%	66	180	Short OJT
53-7061 Cleaners of Vehicles and Equipment	346	416	20.2%	70	197	Short OJT
53-7062 Laborers and Freight, Stock, and Material Movers, Hand	1,678	2,057	22.6%	379	952	Short OJT
53-7063 Machine Feeders and Offbearers	482	496	2.9%	14	144	Short OJT
53-7064 Packers and Packagers, Hand	731	849	16.1%	118	265	Short OJT
53-7072 Pump Operators, Except Wellhead Pumpers	2	3	50.0%	1	2	Moderate OJT Work Exp.
53-7081 Refuse and Recyclable Material Collectors	125	159	27.2%	34	71	Short OJT
53-7121 Tank Car, Truck, and Ship Loaders	7	7	0.0%	0	2	Moderate OJT Work Exp.
53-7199 Material Moving Workers, All Other	62	74	19.4%	12	30	Short OJT
Nonclassifiable**	431	596	38.3%	165	285	
66-0000 Nonclassifiable Occupations	431	596	38.3%	165	285	
66-2000 Nonclassifiable Occupations	431	596	38.3%	165	285	
66-2021 Leased Workers	377	529	40.3%	152	258	
66-2031 Sheltered Workshop Workers	54	67	24.1%	13	27	

*Negative openings reflect the fact that jobs are disappearing faster than workers are retiring from the occupation.

**Nonclassifiable employment

Leased Workers: Workers employed by leasing agencies. The number of workers by occupation employed by leasing agencies is not available.

Sheltered Workshop Workers: Sheltered workshops are organizations that receive funding to employ workers with disabilities or work-related limitations. The number of workers by occupation employed in sheltered workshops is not available.

Highland Avenue Comprehensive
Plan Map Amendment
Tax Lot 36-05-06-00/1400

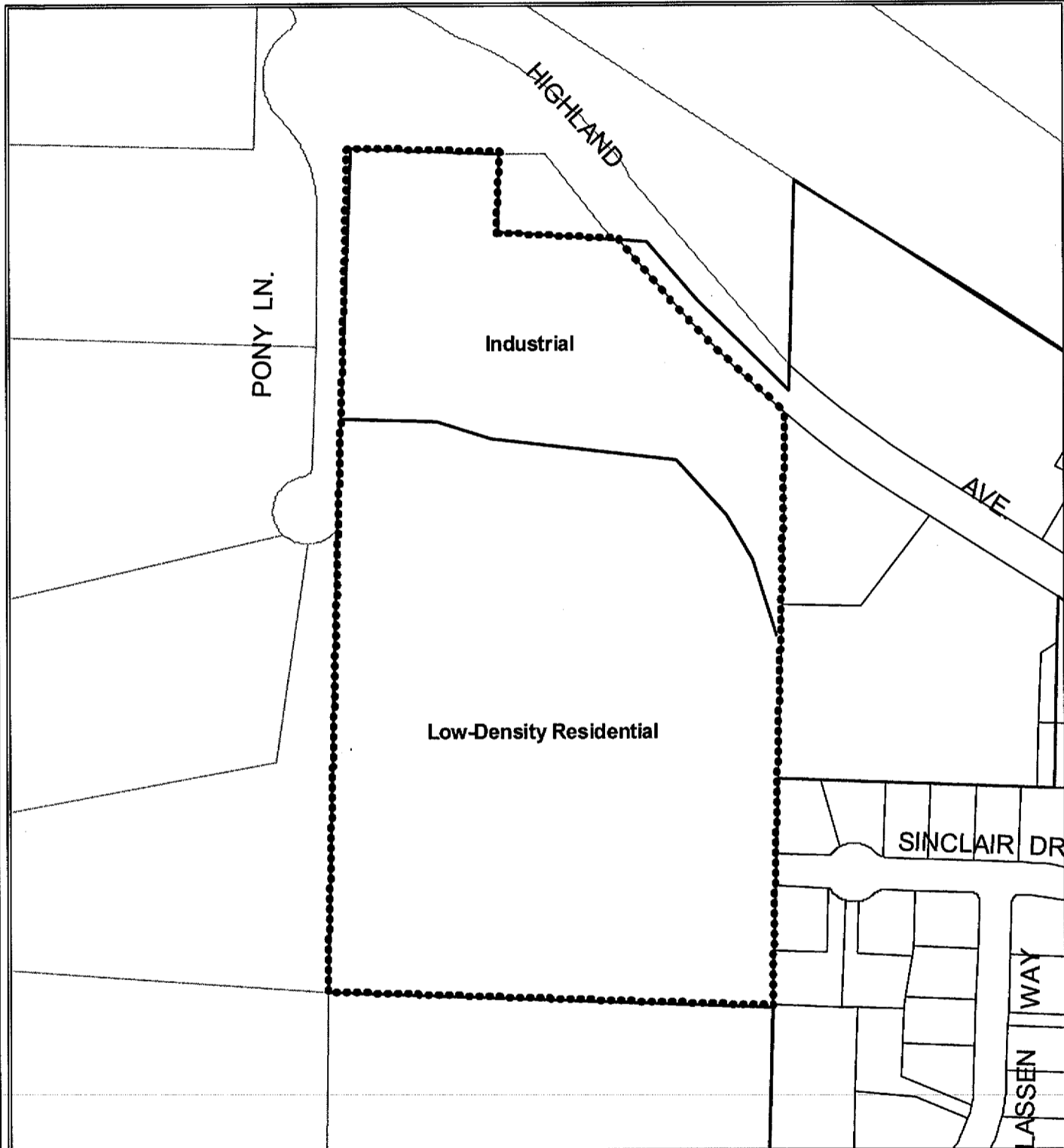


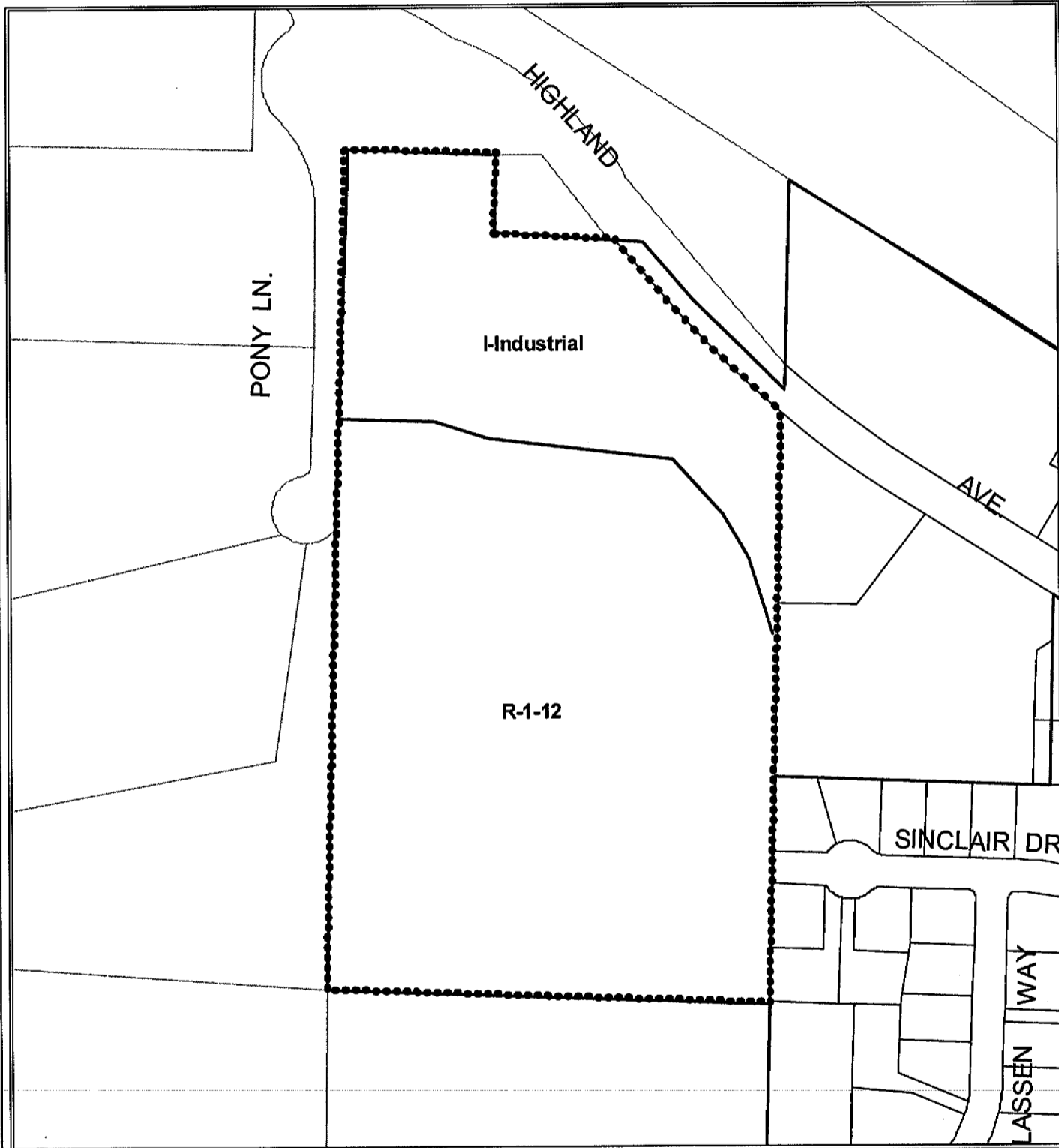
EXHIBIT B

Highland Avenue Zone Map Amendment

Tax Lot 36-05-06-00/1400



Where the Sun Meets the Sky



300 0 300 Feet



EXHIBIT C