



Comprehensive Economic Development Strategy

CEDS

2019—2023

Coos, Curry, and Douglas Counties



Prepared by CCD Business Development Corporation

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Adoption

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This Comprehensive Economic Development Strategy was prepared by:



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INTRODUCTION—SUMMARY—BACKGROUND

About CCD Our CEDS

CCD Business Development Corporation (CCD) is a private, non-profit economic development organization. CCD consists of an **Economic and Community Development Department**, and a **Finance Department**.

ECONOMIC AND COMMUNITY DEVELOPMENT:

CCD has been the Economic Development District (EDD) for Coos, Curry and Douglas counties, since 1971. Communities in southwestern Oregon are resourceful. Once a need for a project is established, CCD can work with the community to organize meetings with stakeholders and conceptualize potential funding sources and subsequent steps. CCD has worked with numerous organizations and agencies on a wide variety of projects. As the project moves forward, CCD has years of experience and continual training on Grant and Project Administration, CDBG and USDA Environmental Review Records, and Labor Standards Monitoring. CCD currently manages **8** Enterprise Zones within the three counties.

FINANCE DEPARTMENT:

In 1981, CCD became a “Certified Development Company” under SBA and began to package SBA 503’s (now known as SBA 504’s). This program helps healthy expanding businesses finance fixed assets projects. CCD’s Finance Department delivers professional commercial loan packaging, closing, servicing and collection services through various direct and indirect loan programs. CCD also has Revolving Loan Funds available to small businesses located in Coos, Curry, Douglas, Jackson, Josephine and Lane Counties. These programs help small businesses that do not qualify for a conventional commercial loans through a traditional lending institution, or partnership is needed to fund a project.

CCD has a 25-member Board of Directors, and in meeting EDA and SBA rules & regulations, our board generally consists of private sector, public officials, representatives of work force development boards, institutions of higher education, minority and labor groups, private individuals, and commercial lenders.

CEDS and Elements of the CEDS:

This strategy serves as the five-year strategic plan for our Economic Development District. It is intended to guide the policies and investments of CCD’s efforts to improve the regional economy in a sustainable manner. This regional comprehensive strategy must address the length and breadth of the economy of Southwestern Oregon—economic strengths, weaknesses, opportunities, and threats. Community/Regional economic resilience is a major theme, and we acknowledge that resilience thinking is literally a different perspective about how change happens in the world.

This CEDS includes:

- Background Summary
- SWOT—Strengths, Weaknesses, Opportunities, Threats
- Analysis for Community Resilience
- Strategic Action Plan
- Evaluation Framework

PURPOSE OF THE CEDS

As part of CCD's Economic Development District (EDD), CCD prepares a CEDS every five years. CCD's Board governs the CEDS, and is responsible for approving the plan, which will have a formal update and review process through the life of the CEDS.

Purpose and Use:

- The Comprehensive Economic Development Strategy (CEDS) contributes to effective economic development in America's communities and regions through a locally-based, regionally-driven economic development planning process. Economic development planning – as implemented through the CEDS – is not only a cornerstone of the U.S. Economic Development Administration's (EDA) programs, but successfully serves as a means to engage community leaders, leverage the involvement of the private sector, and establish a strategic blueprint for regional collaboration.
- The CEDS provides the capacity-building¹ foundation by which the public sector, working in conjunction with other economic actors (individuals, firms, industries), creates the environment for regional economic prosperity.
- Simply put, a CEDS is a strategy-driven plan for regional economic development. A CEDS is the result of a regionally-owned planning process designed to build capacity and guide the economic prosperity and resiliency of an area or region.² It is a key component in establishing and maintaining a robust economic ecosystem by helping to build regional capacity (through hard and soft infrastructure) that contributes to individual, firm, and community success.
- The CEDS provides a vehicle for individuals, organizations, local governments, institutes of learning, and private industry to engage in a meaningful conversation and debate about what capacity building efforts would best serve economic development in the region. The CEDS should take into account and, where appropriate, integrate or leverage other regional planning efforts, including the use of other available federal funds, private sector resources, and state support which can advance a region's CEDS goals and objectives.

From <https://www.eda.gov/ceds/>



SWOT ANALYSIS

Strength

Weaknesses

Opportunities

Threats

CCD conducted a SWOT analysis in partnership with private industry representatives, local government staff, elected officials, community members and other stakeholders. Results of the SWOT Analysis are shown below and has helped guide the identification of regional economic development priorities. This analysis considers the internal factors (strengths and weaknesses) and the external factors (opportunities and threats) that influence economic development in our region. SWOT results help frame and guide the formation of the CEDS goals, objectives, strategies, and actions.

1) NATURAL RESOURCES—TOURISM, ENVIRONMENT, ETC.

Tourism (*Strength/Opportunity/Threat*)

Due to the natural and abundant beauty of our region, as well as climate and activities, there is a growing tourism industry. There are further opportunities to improve regional coordination of events, as well as promoting/ marketing the tourism economy. Potential for collaboration.

Natural Amenities (*Strength/Threat*)

This region's outdoors can offer both residents and visitors an abundance of beauty, activities, forests, water, wildlife, and hiking. This can also attract workers and businesses to locate to our region. With the beauty, also comes the threat of tsunami/Cascadia Event, wildfire, and climate change, possibly having negative effects on attracting those same workers and businesses.

Timber/Logging/Forest Products (*Strength/Weakness/Opportunity/Threat*)

Ample public and private forests abound. Timber in the region is essential for funding local county services, more so than economic development. "Green Lumber" manufacturing has a presence in this area, as well as a nationwide interest. Although mechanized mills may have decreased employment over the past decade or so, there is still employment, & with higher wages. Threats would be increased by timber regulations, policy, and fires. Log supply shortages have been an issue in maintaining jobs. Reduced harvest on public land affects the timber industry's ability to provide job security for workers.

Food Production/Agriculture/Aquaculture/Food Systems/Fishing (*Strength/Weakness/Opportunity*)

Ample farmlands, great climate, a regional interest in some food/ag systems, such as fish, vineyards/wine, hops/beer, creameries. Food Production, and more focus on assisting, promoting existing and new Ag and Food Systems would be an opportunity to expand this area. Lack of port transportation to food processors—food goes up to Tacoma, then shipped out, never returning to our region. Lack of cold storage. Although much of this work is seasonal and not full-time, there are workers that go from crop-to-crop, enabling them to earn more.

1) NATURAL RESOURCES—TOURISM, ENVIRONMENT, ETC. Con't.

Land for Business & Industry (*Strength/Weakness/Opportunity/Threat*)

Availability of buildable land in some areas, for commercial, industrial and residential. Natural gas, electricity, broadband, water & wastewater availability/services are good in some areas but needs expansion in other areas. State Rural Incentives are available. Federal and State regulations are a weakness and a threat. Explore new opportunities for business and industry.

2) TRANSPORTATION

Roads (*Strength/Threat*)

Part of our region has the I-5 corridor running through it, while Hwy. 101, 42, & 38 are also viable routes. The intermodal infrastructure needs continual updates and is a challenge due to topography. Inclement weather can sometimes cause problems on rural roads. Road conditions in the region are, in general, a threat.

Ports (*Strength/Opportunity/Threat*)

Seven ports in the region. Deep water channel in Coos Bay and available sites on North Spit. Deep AND shallow ports within the region, offering specialized industrial, commercial and recreational uses. Port of Coos Bay is one of two Foreign Trade zones in Oregon. The Port of Port Orford is the only port in Oregon that has direct access to ocean water (not a river port). High cost of dredging and availability of dredge.

Rail (*Strength/Opportunity/Threat*)

Freight rail services are a strength in this region. Ability for intermodal transfers. Upgrades and updates are a continual need, as is maintenance.

Air (*Strength/Weakness/Opportunity*)

Southwest Oregon Regional Airport in Coos Bay is the only airport in the region that offers commercial services, however limited. Pilot shortages. Other airports in the region offer air freight, & non-commercial. Airports are small with some services limited due to airplane size restrictions.

SWOT ANALYSIS

Strength

Weaknesses

Opportunities

Threats

3) REGIONAL COLLABORATION

Support Organizations (*Strength/Weakness/Opportunity*)

Numerous organizations seeking to improve and promote region. Core group of people willing to work to make region great. These organizations are sometimes weak in understanding the entire region and could better support & cross-collaborate with other organizations.

Community (*Strength/Weakness*)

Community pride and investment. Sometimes there is a lack of engagement. Volunteering certainly happens but could also be improved.

Entrepreneurial Spirit (*Strength/Opportunity*)

Alive and well. Entrepreneurs of all ages in the region opening businesses and creating work alliances.

Investors (*Strength/Opportunity*)

Roseburg Angel Investors Network – great program for the region.

Vision (*Weakness/Opportunity*)

Lack of consistent vision throughout region. No regional direction or message. Since the previous CEDS, groups have come together for direction, and continue to do so.

4) PUBLIC POLICY– HOUSING – WORKFORCE – COMMUNITY—HEALTH CARE

Public Policy – Government & Leadership (*Strength/Weakness*)

While some people feel their leadership is great, some feel their leaders are resistant to change, show lack of leadership and vision, and there are areas of high turnover with elected officials. Strong competition for resources with metro.

Environmental Restraints–Governmental – Regulations

(*Strength/Weakness/Threat*) Natural amenities are both a strength and a weakness. Wetlands issues, restrictive environmental constraints, extensive natural resource planning, and lack of development, environmentally concerned people. Long permitting processes.

Housing (*Weakness/Threat*)

There is a region-wide lack of housing and affordable housing for workforce/families. There is generally a homeless problem throughout the region. A Housing Study has been done in Coos County, which is an action plan addressing the housing issue. Curry and Douglas counties will soon complete their Housing Study.

4) PUBLIC POLICY– HOUSING – WORKFORCE – COMMUNITY—HEALTH CARE

Con't.

Workforce (*Weakness/Opportunity*)

There are available jobs in regions, however many of those jobs are specialized positions not supported by the local work force. Some workers leave the region due to a lack of family wage jobs. Some of the workforce is under-skilled, & a drug-free workforce is limited. Shortage of housing and trailing spouse continues to be a problem.

Education (*Strength/Weakness/Opportunity*)

Community Colleges in region, several quality school districts, collaboration between colleges and groups such as SBDC, Economic Development groups, WorkSource Oregon, K-12. Some of the more remote areas feel there are not enough local educational opportunities. Lacking skilled trade schools/vocational education in the high schools. Poor school systems, and low performance marks by some schools. There is a sense of urgency to improve our schools and access to education, develop trade schools and classes, training programs for current workforce. SWOCC is expanding their health and sciences.

Doing Business (*Strength/Weakness/Opportunity*)

Relatively low cost of doing business, economically diverse workforce. Supportive networks.

Community (*Strength/Weakness/Threat*)

Strong community identity. Business-friendly, friendly people, retirement communities, quality livability, beautiful surroundings, health care is available, engaged community, volunteers. Some community's roadblock new industry. Poverty in this region. Poor community image – community appearance, social issues related to generational poverty, substance abuse, domestic violence, child abuse, poor health, homelessness.

Health Care (*Strength/Weakness/Opportunity*)

Core medical services are available. This continues to improve. Medical courses expanding in local colleges. The medical community is a large employer, and the need for medical services continues to grow. Medical services include transport (air and road), and there are current discussions on what would be needed in catastrophic events. Throughout the region, there is a strong need for mental health programs, and increased foster care providers. State of the art medical facilities are available in some areas, but medical providers are still needed. Shortage of housing and trailing spouses are part of the shortage of medical providers.

SWOT ANALYSIS

Strength

Weaknesses

Opportunities

Threats

5) OTHER

Infrastructure (*Strength/Weakness/Threat*)

Overall, **broadband** for urban areas is adequate. Basic broadband service is lacking in many rural areas, affecting both residential and commercial use. Some areas are addressing these issues.

Water/Sewer—Overall, this infrastructure is constantly being upgraded when possible and needed. This is costly to the smaller communities, and they must try to find affordable funding through various agencies. Sewer infrastructure systems are a challenge when providing capacity and accommodating job growth.

Power—Some areas already can provide large power users service in a reasonable amount of time. Some areas experience redundancy issues.

Energy Considerations—Some areas have, and continue, to study alternative energy and can be a source of jobs.

Natural Gas, Commercial Use—Curry and western Douglas Counties do not have natural gas available. This can limit recruitment of new business.

Natural Gas—Export—Expansion can cause local business expansion opportunities, with increased employment.

Rail—Continued expansion plans, including increasing usership and line speed.



PRIORITY GOALS / STRATEGIC DIRECTION / ACTION PLAN

PRIORITY GOALS

Natural Resources—Tourism, Environment, Etc.

Transportation

Regional Collaboration

Public Policy—Housing—Workforce—Community—Health Care

Other (includes broadband, water, sewer, power, alternative energy)

NATURAL RESOURCES—TOURISM, ENVIRONMENT, ETC.

Overview

In the SWOT analysis, this region is recognized often for the natural resources that are abundant. The region is proud of the natural resources and what it provides, both in beauty and use. Natural Resources give this region *strength/opportunity*, as well as *weakness/threats*.

Tourism—*Growing tourism industry, natural and abundant beauty. Regions need to improve coordination of events, promoting/marketing.*

Natural Amenities—*Nice for residents, can attract workers/business. Tsunami/Cascadia threat, wildfire.*

Timber/Logging/Forest Products—*Ample forests, “green lumber”. Wildfire, continually increasing timber regulations, available log supply shortage.*

Food Production/Agriculture/Aquaculture/Food Systems/Fishing—*Ample farmlands, vineyards/wine, hops/beer, creameries, fishing. Transportation and lack of cold storage.*

Land for Business & Industry—*Some land availability, infrastructure to areas, rural incentives/funding. Federal and State regulations can make things difficult; lack of important infrastructure to some areas.*



STRATEGIC DIRECTION / ACTION PLAN

PRIORITY GOALS

Natural Resources—Tourism, Environment, Etc.

Transportation

Regional Collaboration

Public Policy—Housing—Workforce—Community—Medical

Other (includes broadband, water, sewer, power, alternative energy)

Vision Statement/Direction—Where do we want to be in several years?

While our region is abundant in beauty, natural amenities, ample forests, farmlands, and buildable land, we must balance this as we improve and grow tourism, our timber industry, food/ag production, and business. We will continue to seek improvements in the permitting processes, coordinating with our neighboring communities as well as outside of our region. Seek new opportunities in business, as well as new business ideas or improvements. Work towards a balance of quality of life versus timber harvest, economic development, transportation, etc.

Action Plan—How do we get there?

- Work with partners, other communities, and experts (Travel Oregon, Travel Southern Oregon Coast, Oregon South Coast Regional Tourism Network, for example) to improve what we do in our communities as far as promoting tourism.
- In working with partners, coordinate events and calendars that make sense, and encourage visitors and locals to enjoy events and the beauty of our region for a longer time.
- Communities and counties must continue to prepare in keeping communities safe in case of a natural threat. Plans in place for safety, marked in our communities and taught to our communities and our visitors.
- Work with our community, county, and state leadership in regard to regulations, permitting time, and other laws that do not work with our situations, businesses, or land.

Upcoming/Possible Project List:

- Address issues such as sudden oak death (affecting exports) and gorse (affecting ag lands)
- Community Safety in case of natural threat—plans, education, supply, medical, transportation, infrastructure, resiliency.
- Regulatory processes—expedite
- Food production, agriculture, aquaculture, food systems, fishing, etc. Education, address issues such as transporting food and ag, cold storage, and other barriers.
- Grow tourism through promotion, partners, community awareness/education
- Tourism—more packaged product and product development within the region
- Attract more high-value visitors, including international and travel trade opportunities
- Branding and Marketing the region, products, sites, etc.
- Educational Centers, Visitor Centers, Parks, Recreation, Wildlife/Marine Reserves

PRIORITY GOALS / STRATEGIC DIRECTION / ACTION PLAN

PRIORITY GOALS

Natural Resources—Tourism, Environment, Etc.

Transportation

Regional Collaboration

Public Policy—Housing—Workforce—Community—Health Care

Other (includes broadband, water, sewer, power, alternative energy)

TRANSPORTATION

Overview

In Coos, Curry, and Douglas counties, transportation means are different in each area, due to various reasons. Diverse modes of transportation are important to the entire region, and can be both a **strength/opportunity**, as well as a **weakness/threat**.

Roads—*Interstate 5, Hwy.'s 101, 42, and 38. Continued bridge maintenance.*

Ports—*Several ports in the region, one with deep water channel and north spit availability. High cost of necessary dredging.*

Rail—*Strong rail service in this region, ability for inter-modal transfers. Still requires much needed maintenance and updates.*

Air—*Several airports in the region, some services include commercial, air freight, non-commercial. These airports are small, commercial services are limited, as is freight, airplane size restrictions. Lack of pilots.*



STRATEGIC DIRECTION / ACTION PLAN

PRIORITY GOALS

Natural Resources—Tourism, Environment, Etc.

Transportation

Regional Collaboration

Public Policy—Housing—Workforce—Community—Health Care

Other (includes broadband, water, sewer, power, alternative energy)

Vision Statement/Direction—Where do we want to be in several years?

Our region's transportation system and infrastructure are good and bad. We must continue to maintain and improve our infrastructure to reduce road and rail closures, as well as our ports and air. This will help us compete for business and keep our communities safe.

Action Plan—How do we get there?

- Keep working with the State and Counties on roads and rail improvements.
- Advocate for continued dredging funding.
- Work with our airports to improve commercial and freight services, runways, and other infrastructure.

Upcoming/Possible Project List:

- Channel modification
- Rail improvements
- Port of Port Orford redevelopment project, including building, and infrastructure
- Port development and maintenance
- Air—Flights to Portland are necessary for the coast, and it has been challenging - this service keeps getting discontinued.
- Airport development and maintenance
- Roads—keeping routes and alternative routes always open to I-5.
- Bridge replacements and continued bridge maintenance.
- Improve and increase public transit.
- Overall infrastructure development and maintenance.

PRIORITY GOALS / STRATEGIC DIRECTION / ACTION PLAN

PRIORITY GOALS

Natural Resources—Tourism, Environment, Etc.

Transportation

Regional Collaboration

Public Policy—Housing—Workforce—Community—Health Care

Other (includes broadband, water, sewer, power, alternative energy)

REGIONAL COLLABORATION

Overview

This region is proud of their strength in collaboration. It is mostly seen as a *strength/opportunity*, but there was still *weakness* noted.

Support Organizations—*Core group, good people, ready to work.*

Community—*Strong sense of community.*

Entrepreneurial Spirit—*Alive and well, practiced.*

Investors—*Roseburg Angel Investors.*

Vision—*A lack of cohesive regional vision throughout region.
Capacity to follow through.*



STRATEGIC DIRECTION / ACTION PLAN

PRIORITY GOALS

Natural Resources—Tourism, Environment, Etc.

Transportation

Regional Collaboration

Public Policy—Housing—Workforce—Community—Health Care

Other (includes broadband, water, sewer, power, alternative energy)

Vision Statement/Direction—Where do we want to be in several years?

Communities and organizations working more with each other, as well as local government, entrepreneurs, and investors. Improve regional vision within and with others in the region. Build capacity to do the action.

Action Plan—How do we get there?

Communities reach out to other organizations to form strong networks.

Develop roadmaps to get there. Task forces. Action Plans.

Upcoming/Possible Project List:

- Succession Planning
- Tourism Collaboration
- Co-location/Incubation spaces (such as REEF)
- Planning, Task Forces for the region
- Collaboration on subjects such as crime, poverty, homelessness, child abuse, & other obstacles in communities/regions.
- Investors inside or outside of Region (Roseburg Angel Investors Network, etc.) to expand businesses, identify new business opportunities.
- Communication networks to update the business communities.
- Increase business opportunities to sustain current businesses.
- Expand capacity for business expansion.
- Workforce development so current job openings can be filled, regionally.

PRIORITY GOALS / STRATEGIC DIRECTION / ACTION PLAN

PRIORITY GOALS

Natural Resources—Tourism, Environment, Etc.

Transportation

Regional Collaboration

Public Policy – Housing – Workforce – Community – Health Care

Other (includes broadband, water, sewer, power, alternative energy)

PUBLIC POLICY-HOUSING-WORKFORCE-COMMUNITY-HEALTH CARE

Overview

As with many parts of the state and nation, there are some common strengths and weaknesses with the above points, as well as some local and regional differences. **Strengths & Opportunities**, and **Weaknesses & Threats** summarized:

Public Policy-Government & Leadership—*Some feel their leadership is great and some feel their leaders are resistant to change and lack of vision. Rural is often overlooked by metro.*

Environmental Restraints—Governmental—Regulations—*Huge majority of respondents feel that this state has very restrictive land use laws, permitting, poor planning and development.*

Housing—*As with so much of our country, there is a housing shortage, lack of affordable housing, and a homeless problem.*

Workforce—*Present workforce finds shortage of family-wage jobs. The limited, available workforce may be under-skilled and unable to pass drug tests.*

Education—*Quality Community Colleges, public schools, and groups/organizations that help all age groups. Remote areas may sometimes lack in these same areas. There is a need for skilled trade training in school districts.*

Doing Business—*Low cost. Economically diverse workforce.*

Community—*Some find business-friendly areas, friendly people, great area to retire, and low cost of living in a beautiful setting. Some areas seem to roadblock new industry or growth. Poverty, substance abuse, child abuse are major issues.*

Health Care—*Core medical services are available, medical courses expanding in local colleges. Throughout the region, there is a strong need for mental health programs, and increased foster care providers. State of the art medical facilities are available in some areas, but medical providers are still needed.*

STRATEGIC DIRECTION / ACTION PLAN

PRIORITY GOALS

Natural Resources—Tourism, Environment, Etc.

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Vision Statement/Direction—Where do we want to be in several years?

One of the most pressing issues for the region is the housing shortage—this covers all sectors from professional level higher-end housing, to workforce housing for middle income, to supportive housing. Continue our path of education—providing tools for our communities to learn trade skills, healthy school environments, and easy access to education. A healthier workforce and community. A reduction in poverty and substance abuse.

Action Plan—How do we get there?

- Work with our leaders to streamline the processes. This would help new and existing businesses grow.
- Identify areas that houses can be built; address the hurdles and initiate the process.
- Coos County Housing Study is completed—use this study's action plan.
- Curry and Douglas County Housing Studies will be completed—use these study's action plans.
- Train and improve our workforce.
- Support opportunities for employment growth.
- Increase living wage jobs.

Upcoming/Possible Project List:

- Tide Gates, Levees
- Update Estuary and other plans
- Housing—streamlining permitting and other processes in order to increase housing in region.
- Housing—Develop the expertise, use Housing Action Plans/Studies and other information.
- Housing—address any opportunity to develop new housing, or rehabilitation of current housing stock.
- Medical Facilities—up-to-date/upgrades, expansion—keep current.
- Medical Facilities—plan for catastrophic event.
- Re-educate Employers on today's workforce.
- Workforce Training.
- Bond Measures—educate the public.
- Health and Sciences Education—improve and expand.
- Pilot Projects—CTE in High Schools, etc.
- Promote the region.
- Support entrepreneurial spirit.
- Business expansion, new business recruitment.
- Safety for citizens.
- Business advocacy
- Help promote/advocate/support programs such as Head Start, food banks, etc.
- Business Community—resources and assistance, low cost training opportunities.
- Healthy Communities—health and social services/programs.
- Microenterprise
- Technical Assistance for projects.
- Downtown Revitalization—Main Street programs
- Business Districts—create/revitalize.
- Seismic—Upgrades to medical facilities, schools, fire/police, water, wastewater, power.
- Boardwalks, pathways, trails
- Renovation of iconic structures.
- Increase foster care programs, address child abuse, CASA, etc.

PRIORITY GOALS / STRATEGIC DIRECTION / ACTION PLAN

PRIORITY GOALS

Natural Resources—Tourism, Environment, Etc.

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Other (includes broadband, water, sewer, power, alternative energy)

Other

Overview

Other very important subjects came up repeatedly, so they were thrown into the “other” category. These subjects are overall infrastructure, and what makes our communities healthy and attractive to prospective residents and businesses. There are both **strengths/opportunities**, as well as **weaknesses/threats**.

Broadband—*Urban areas in our region have adequate broadband.* Basic broadband service in rural areas is lacking, affecting residents and commercial users.

Water/Sewer—*Constantly being upgraded.* *Staying upgraded can be costly to smaller communities.* *SDC Cost.*

Power—*Some areas have ability to provide large power users service in a reasonable amount of time.* *Redundancy issues.*

Natural Gas—Commercial Use—*Not available to all areas, which limits business recruitment.*

Natural Gas—Export—*As this expands, this will allow business expansion and employment.*



STRATEGIC DIRECTION / ACTION PLAN

PRIORITY GOALS

Natural Resources—Tourism, Environment, Etc.

Transportation

Regional Collaboration

Public Policy—Housing—Workforce—Community—Health Care

Other (includes broadband, water, sewer, power, alternative energy)

Vision Statement/Direction—Where do we want to be in several years?

We want our communities to always have affordable healthy water and sewer systems. Improve our rural areas with increased broadband service. Continue our research into alternative energy. More available power to large power users. Increase natural gas availability to the region.

Action Plan—How do we get there?

- Seek both local and outside companies that can increase broadband in areas still in need.
- Infrastructure Assistance—low cost loans, grants.

Upcoming/Possible Project List:

- Jordan Cove Energy Project
- Assisting community planning process and business support for large business—new or expansion.
- Natural Gas expansion
- Infrastructure projects in planning stages and upcoming.
- Industrial Parks—development/expansion/infrastructure needs/mitigation.
- Regional/local recruitment/advertisement of businesses that would work within existing infrastructure.
- Brownfield development

ECONOMIC RESILIENCE

Economic resilience is defined as the capacity of a region, its people, and its communities to withstand shocks to health and well-being including physical and financial security, because of national and global economic crisis and natural disasters. The purpose of economic resiliency is to save and create as many jobs as possible, so that when a shock occurs, which is inevitable, the community, region and people have options. The end goal is to raise wealth and raise living standards.

*Resilience
IS....*

The ability to

Anticipate

Adapt

Flourish

*In the face of
change.*

Shocks can be categorized in one of two ways, economic shocks and physical shocks. Economic shocks are caused primarily by economic forces such as the closing of a major factory or the extreme slowdown in an industry, such as in the fishing or timber industries. This can result in great loss in employment.

Physical shocks, such as Tsunami or earthquake, or both, cause harm to either built or natural environment. Physical shocks are economic in nature as well so the issue is more than just repairing the physical damage. The economic damage caused by the destroyed property and the loss of income and businesses must be repaired also.

Main Vulnerabilities

The core vulnerabilities coordinate with the weaknesses and threats highlighted in the SWOT analysis. The input on the specific vulnerabilities of the region resulted in some clearly defined challenges for the region to heighten its economic resiliency:

- **Natural Resources – Tourism – Environment.** We face challenges in recognizing and dealing with the environmental restraints such as wetlands issues, land use laws/regulations. The threat of Tsunami, earthquake, wildfires and climate change have negative effects on attracting tourists, workers and businesses.
- **Workforce Challenges.** The region suffers from a lack of family wage jobs. However, there is a shortage of workforce primarily because of the lack of higher education and skilled labor. Aggravating the problem is the lack of a drug-free work force. Planning and developing new opportunities in the future to train the workforce must take place.
- **Regional Collaboration.** The region needs to be ready for the future with a more consistent vision throughout. The support of the residents in recognizing the opportunities existing and creating work alliances requires recognition and support to maintain a healthy community family. An improvement of the community image needs to take place away from the of lack of education, crime and poverty which remain obstacles.
- **Public Policy – Housing – Workforce – Community—Health Care.** We face challenges in the level of understanding and collaboration between the leadership of the counties and cities. Without this collaboration and vision, it is difficult to move forward in a regional direction. The lack of family wage jobs, the lack of housing and especially affordable housing is a near crisis as it is in many areas of Oregon.
- **Transportation.** Expanding and maintaining the infrastructure required to move goods and people is a challenge in the coastal areas of the regions. There is a need to invest in new and improved transportation infrastructure such as roads, bridges, rail and air. Public transportation is necessary both from a human and social services standpoint but also from an economic standpoint. It is difficult to provide market access through a rail service that needs expansion and has high maintenance costs. There is a need to provide a working safe and effective regional transportation system.

We must acknowledge that resilience thinking is literally a different world view about how change happens in the world.

NOW

In the process of developing the strategy, the group emphasized the following areas in which they believe the region is doing well in addressing economic resiliency:

- Building upon the support of economic organizations/partners. Many organizations are seeking to improve and promote the region.
- Entrepreneurial spirit is alive and well.
- Willing investors in the Angel Investors Network to expand businesses and identify new businesses.
- The many natural amenities in the region provide an attractive tourism industry.
- There are seven Ports and there are rail services that are being developed.
- There is air service on the coast that is providing travel options for the residents and businesses.

Responsive Initiatives

Examples of responsive initiatives in the regional strategy:

- Communication networks updating the business community.
- Established coordination plans and succession plans for leadership and businesses.
- Collaborated plans that define who does what.

Moving Ahead (steady-state initiatives)

- Address opportunities to develop housing availability.
- Workforce and skills development for an educated and skilled regional workforce.
- Address regulatory concerns.
- Community collaboration to focus on target infrastructure projects such as transportation and water and wastewater system.
- Address concerns and plans related to a shocking event.
- Create a region that is safe and that provides jobs for its citizens.

The reality is that existing tools on their own no longer suffice. Rather, the power of resilience lies in using what it teaches us about complex dynamic systems, to ask different questions about the problems we face, and to co-produce and share knowledge about the root causes, structures, and processes behind the substantial development challenges, we face. Ultimately, resilience requires entirely new practices, ones that are not just created by conventional experts.

END GOAL:

***Raising wealth and
Raising living standards.***



***A job is a
strategy –
Hope to
create
wealth
with jobs.***

ECONOMIC PROFILE for 2019 CEDS

REGION: Southwest Oregon; Coos, Curry and Douglas Counties

Environmental, Geographic, Climatic, Natural Resources, and Tourism



The Coos, Curry, Douglas region has a combined population of 193,074 and consists of 8,348 square miles. There are 22 Incorporated Cities and 6 Port Districts stretched between the edge of the Willamette Valley to the north, the California border to the south, the Pacific Ocean to the west and the Cascade Mountain Range to the East. This region is entirely rural, rich in natural resources with an economy that has historically been supported by a foundation of nature-based industries, such as fisheries, forest products, agriculture, mining and tourism.

The coastal zone and inland valleys are characterized by wet winters, relatively dry summer and mild temperatures throughout the year. Coastal terrain features include a coastal plain, numerous coastal valley, and the Coast Range. Rivers such as the Coquille, Umpqua, Rogue, and Chetco dissect the Coast Range and drain its slopes. Inland areas of the region are one of the more rugged parts of the State. Deeply indented river valleys separate mountains and ridges, with most of the rivers flowing westward towards the Pacific Ocean. Although much of the area lies in somewhat of a rain shadow, sheltered from the Pacific by the Coast Range to the west, many of the higher elevation sites receive abundant precipitation. The abundant moisture supports lush pastures for dairy and animal production as well as valley crops of grass seed, flower bulbs, nuts and fruit.

Along the lower elevations of the immediate coast, normal annual precipitation is between 65-90 inches. However, some areas of Douglas County receive only 20-40 inches annually. Several days of abundant rainfall can cause strong flood events and landslides affecting the transportation links in and out of the region. As is typical of western Oregon, the highest monthly precipitation values occur in the winter months of November, December, and January. Although many areas of the state are seeing less than average rain in the past few years resulting in drought, fire danger and subsequent hazards. Last year the lack of rain fall, below normal snow pack in the mountain ranges, and drier than normal conditions, resulted in multiple fires throughout the region and state. On June 1, 2018 the United States Department of Agriculture, Natural Resources Conservation Service indicated that most areas of the state has been drier than usual since the water year began on October 1st. Parts of southern Oregon experienced several consecutive months with below average amounts of precipitation during the critical winter months. The Rogue, Umpqua and Harney basins all tied for the lowest seasonal amounts at 77% of average. –*SEE Appendix A, Figure A.1 & A.2.*

The Southwest region can offer both residents and visitors an abundance of beauty, activities, forests, water, wildlife, hiking, etc. The natural and abundant beauty of our region, as well as climate and activities provide our region with a growing tourism industry dependent on the overall health of the economy. This quality of life can also attract workers and businesses to locate to our region. With the beauty, also comes the threat of tsunami/Cascadia Events, wildfire, and climate change which in turn could possibly have negative effects on attracting those same workers and businesses.

Despite the region's unique attributes and competitive advantages in several areas of economic activity, the economy and employment are still dominated by the fundamental changes in the wood products industry. The decrease in federal subsidies (i.e. O&C, Secure Rural Roads) over the past several years has negatively impacted the region. Increased additional timber regulations, environmental and other regulatory issues,

policies and fires are growing concerns amongst this rural region. There are ample forests abound and a concern amongst the communities with an old attitude of only relying on timber/forest products rather than looking elsewhere for economic development. “Green Lumber” manufacturing, laminated timber products and other specialty wood products have a growing presence in this area, as well as a nationwide interest.

As a result of extensive farmlands and mild climate there is a regional interest in food and ag systems, such as: fisheries, vineyards (wine), hops (beer), creameries (cheeses, milk, additional dairy products), and general food production. Growth in the wine industry, hops, and microbreweries were seen throughout the state. Regional Economic profiles from The Oregon Employment Department show growth in the Micro-breweries have slowed compared to the fast-paced growth in recent years but continue to outpace broad economy (See Appendix B, Figure B.1).

Wine-related revenues, jobs and wages showed loss from 2010 to 2016 in both Coos and Curry Counties. Douglas County’s revenues, jobs, and wages drop from 2010 to 2013 but then shows significant increases in 2016. Post-recession, (Douglas County) Umpqua Valley Vineyards increased the numbers of acres of wine grapes planted, significantly increasing capacity. Individual wineries host summertime events, such as music festivals, picnics, as well as wine competitions drawing in visitors from outside the area. Further opportunities include improving regional coordination of events, as well as promoting and marketing the visitation economy. (See *Appendix B, Figures B.2 & B.3*). Pairing activities such as cycling, wine and brewery tours could increase external revenue and bring awareness into the area.

The Comprehensive Economic Development Strategy Committee along with survey respondents made up of private industry representatives, local government staff, elected officials, community members and stakeholders indicated our natural resources provide the region with areas of strength and opportunity for growth. Promoting and marketing new Ag and Food Systems would expand strength and resiliency in this area.

There are 6 Ports in the Coos, Curry, Douglas region; Port of Umpqua, Port of Gold Beach, Port of Bandon, Port of Port Orford, Port of Brookings Harbor and the International Port of Coos Bay. Ports create and maintain industrial and commercial infrastructure in surrounding areas and are of vital economic importance to the coastal communities, as well as, state tourism and the recreational and fishing industries. Their role in attracting jobs and private investment is especially beneficial to rural areas where industrial infrastructure might not otherwise be developed. Ports and harbor communities on the southern Oregon coast that have traditionally provided affordable housing for cannery workers and fishers have become a popular relocation destination for recent retirees from across the country. This gentrification of coastal port communities has driven up property values in the vicinity of the Oregon’s scenic port communities, moving low-wage fishers and seafood processing workers further from their places of employment.

A Maritime Sector Strategy is currently being developed by the Work Force Talent and Development Board (WTDB). The Oregon Workforce Talent and Development Board (WTDB) is the overall advisory board to the Governor on workforce matters, including developing a strategic plan for Oregon’s Workforce Development System. Appointed by the Governor under the Workforce Innovation and Opportunity Act, the WTDB is made up of leaders representing private business, labor, community-based organizations, Oregon legislature, local government, and state agencies.

The navigation channel and bars of most ports must be dredged periodically to maintain their depths, due to natural buildup of silt deposit. In 2014, the legislature authorized \$2 million for the purchase of a portable dredge and related equipment to conduct dredging in port marinas and non-federal channels. The state took possession of the portable dredge "THE LAURA" in 2015 and it has been put into operation at some of the state's south coast ports. Originally, "THE LAURA" was to only be used at Ports along the south coast to dredge launch ramps and marinas but will now be utilized throughout the State of Oregon. Costs associated with marina dredging by private contractors are significant due to the costs incurred with mobilizing and demobilizing dredge equipment. Smaller ports are not able to afford the cost to dredge their marinas, which has led to shoaling within marinas along the entire Oregon Coast. The State's purchase of "THE LAURA" and her tender, a 30' twin outboard vessel equipped with a 1-ton crane, has helped to significantly reduce the cost of dredging in marinas, making it more affordable and obtainable for the smaller ports to remain safe and viable.

Fishing draws additional tourism to the southern Oregon coast, it also brings Commercial fishing, jobs and employment. In addition to direct employment, commercial fishing provides the resource for seafood processors. The seafood and agriculture commodities produced in the region experienced a period of decline parallel to the timber industry. The historically diverse independent network of seafood processing facilities throughout the northwest had been consolidated to a few entities. According to the Oregon Employment Department, In 2017, Oregon had 32 employers and 1,172 employees turning slimy fish and armored crustaceans into succulent seafood ready for cooking and eating. The addition of more businesses is partially reversing a trend of consolidation in the industry. Although the number of fishing vessels has declined from historic highs, it has stabilized for the past few years. *(See Appendix C.)*

Federal and State environmental regulatory agencies assist and enforce permitting processes that are meant to aid in following the Environmental Laws protecting the environment and natural resources. Although necessary, these permitting processes and consultations are often difficult to maneuver, time consuming, costly and cumbersome. Coalition efforts amongst the various Federal and State environmental regulatory agencies are continuous. Regulations are mandatory requirements that can apply to individuals, businesses, state or local governments, non-profit institutions, or others. The Coos, Curry and Douglas region is home to many endangered species, plants, animals, bugs, and areas of wetlands and pristine rivers and water sources, not to mention the Oregon shoreline and Pacific Ocean. The delay and expenses that the environmental permitting processes can bring to new development can make or break a potential project.

Building. Utilities. Infrastructure and Transportation

Inland areas of the region are one of the more rugged parts of the State. Due to the ruggedness of the terrain, portions of the region remain sparsely settled. Roseburg is the primary urban area in the Umpqua Valley and serves as a quasi-transportation hub for the region.

There is available buildable land and few roads throughout each of the counties, for commercial, industrial and residential. Much of the remaining land in the region is rugged terrain making building difficult. The permitting process for new development can at times detour investors, landowners and business owners from engaging in new development or relocation into the area. The CEDS Strategy Committee identified this as a weakness and threat. Opportunities exist in engaging progressive thinking towards business and industry and streamlining the permitting and regulatory processes. In turn, this would help new development in the area become more attainable and business friendly.

Oregon has three natural gas, three investor-owned electric utilities, and 36 consumer or publicly-owned electric utilities. According to the Oregon Department of energy, Oregon's electricity comes from a variety of resources, from coal and petroleum to nuclear energy. We also use renewable resources – including water, wind, and the sun. Solar power is growing interest in the region. State Rural Incentive Programs offer assistance in making these renewable power sources more readily available and obtainable. Most of the industrial and commercial areas throughout the planning area have the ability to provide large power users service in a reasonable amount of time.

Fiber-optic availability, basic broadband service and redundancy are adequate in the more urbanized areas of the region. This provides a more positive outlook and incentive for existing and new businesses that are considering locating, relocating or engaging in business and industry in the region. Fiber-optic, broadband services and redundancy provide a crucial link for businesses and industry to conduct their operations in a smooth, consistent and efficient manner. Basic broadband service continues to lack in the more rural areas essentially closing them off to new interest in business development and can cause existing businesses and residents to consider leaving the area. Some rural areas of the region are addressing these issues.

Much of the infrastructure including transportation, housing, water and wastewater systems, schools, and healthcare facilities were built during the rapid expansion of the wood products industry in the 1980's or before and has reached the end of its useful life. Communities are continuing to work towards upgrading, repairing, replacing, retrofitting and stabilizing the foundations of their communities. Water and wastewater facilities and systems are constantly being upgraded as needed. The high cost of water and wastewater system upgrades cause smaller communities to turn to affordable funding through various agencies. As preceding generations retire, the demand for drinking water and wastewater operators rises in Oregon and the U.S. According to the Oregon Employment Department's employment projections, the operator workforce will add 95 jobs between 2014 and 2024, and with retirements looming, an estimated 40 annual openings. This represents an 8.1 percent increase in employment over 10 years, which is higher than the national job growth rate for drinking water and wastewater operators (6.0%).

The primary North-South vehicle corridor through the coastal portion of the region is the Scenic Oregon Coast Highway (US Highway 101) which connects the primary population centers along the 125 miles of roadway. Interstate 5 runs through North-South through the center of Douglas County. In the southern portions of the coastal planning area, segments of Highway 101 are at a substantial risk of landslides linked to winter storms. Portions of Douglas County are located on I-5. Other routes included smaller east-west roads which serve to connect coastal areas with the I-5 corridor such as Highway 42, Highway 38, Highway 138, Highway 197 and Highway 199. *(See Appendix D Figures D.1 & D.2)* The rural scenic roadways are good for tourists but create challenges for residents, businesses, and industry. Frequent road closures due to inclement weather and sub-sequential construction and clean-up cause delays for moving and shipping product and perishable goods.

The region welcomed the re-opening of the Coos Bay Rail Line in 2011 which offers rail and freight services moving cargo through the Coos Bay harbor supporting existing and future industrial operations. The rail link restored full service in April 2013 hauling the first rail cars of plywood in almost 6 years. The restoration of the 100+ year old rail line and services has led to job retention and creation in the south coast region. The Coos Bay Rail Line spans 134 miles from Coquille, Oregon to Eugene, Oregon and provides connections to the North American rail network for manufacturing operations in Coos, Douglas, and Lane Counties, and for marine terminals in the Coos Bay harbor *(See Appendix D Figure D.3)*. The value of use of the rail is restricted due to the age of the rail link creating a long-term challenge as it reflects to

the time the infrastructure was built around 1914. The rail link does not support high-speed locomotives and tunnels and bridges were originally built for the older traditional type locomotives which restricts the size and load capacity. The International Port of Coos Bay oversees rehabilitation of the rail line and has helped to secure over \$90 million for needed upgrades. Tunnel Repair work is ongoing and new railroad ties and ballasts along the entire line have been installed. Electrical systems and public crossings are also being updated and are ongoing.

The largest airport in the region is Southwest Oregon Regional Airport (See Appendix E Figure E.1.). The airport offers daily commercial flights through United Airlines to San Francisco, and seasonally twice per week to Denver. In addition to commercial service, the airport experiences significant volumes of private aircraft due to its proximity to Bandon Dunes Golf Resort. UPS and FedEx also utilize the airport daily, along with the Brookings Airport and Roseburg Municipal Airport

Cultural Tribes

Historically, multiple Native American bands have lived throughout the region. Many Oregon tribes were consolidated onto reservation, on what were, in the late 1800's, less desirable coastal areas.

Today the active tribes in the region are:

- Coquille Indian Tribe,
- Confederated Tribes of Coos, Lower Umpqua & Siuslaw Indians
- Cow Creek Band of the Umpqua Tribe.

The Coquille Indian Tribe's Coquille Economic Development Corporation (CEDCO) has become an economic player in the region providing many employment opportunities. The Tribe and its businesses is the second largest employer in Coos County. An independent study using 2010 data showed a total direct economic output of \$68.3 million resulted in a secondary output of \$96.9 million for a total statewide output of \$165.2 million. Businesses managed by CEDCO directly supported 622 jobs with \$33.6 million in wages and cash benefits. Spending by those businesses indirectly supported in another 670 jobs paying a total of \$21.3 million in wages during the year.

The Cow Creek Band of Umpqua Tribe of Indians is one of nine federally recognized Indian Tribal Governments in the State of Oregon. The Cow Creek Band of the Umpqua Tribe has the Umpqua Indian Development Corporation (UIDC), which is the business division of the Cow Creek Band of the Umpqua Tribe of Indians. All the business holdings of the tribe fall under this "corporate umbrella." In 2016, the Tribe commissioned ECO Northwest to conduct a "net economic benefit analysis" on 2015 figures to determine the impact of tribal businesses and activities on the economy of Douglas County. They found that Douglas County economic output was \$188.494 million greater due to the jobs and activities provided by Tribal Government. Tribal Government provided 1,331 more payroll jobs in Douglas County and paid \$72.8 million in total payroll in the county.

The Confederated Tribes of Coos, Lower Umpqua, and Siuslaw Indians (CTCLUSI) The Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians are made up of 3 tribes (4 Bands): 2 bands of Coos Tribes: Hanis Coos (Coos Proper), Miluk Coos; Lower Umpqua Tribe; and Siuslaw Tribe. During the past several years, the Tribal Planning Department, Tribal Council and Tribal members have conducted and participated in studies to develop demographic data and determine socioeconomic needs of the tribal membership. On Saturday, August 4,

2018, The Confederated Tribes of Coos, Lower Umpqua, and Siuslaw Indians (CTCLUSI) held a historical Land Bill Ceremony at Gregory Point, Coos Bay, Oregon in recognition of the Western Oregon Fairness Act having been signed into Public Law on January 8, 2018. The Western Oregon Tribal Fairness Act cedes 14,742 acres to the Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians, and 17,519 acres of federal land to the Cow Creek Band of Umpqua Indians. The bill also amends the Coquille Indian Tribe's Restoration Act to require the Interior Department to manage their forest lands in the same manner as other Tribal forests. This land base that will provide for the social and economic revitalization of their community and the Tribe is seeing some restitution from the federal government. This will help to build a sustainable future for the next seven generations.

Demographic and Socioeconomic Data

The 2010 U.S. Census shows the State of Oregon has a total population of 3,831,074 with 193,074 of those being residents in the Coos, Curry, Douglas region. (Coos County 63,043, Curry County 22,364, and, Douglas County 107,667). Population forecasts from the Population Research Center predict that in 2018 the region will increase to 198,707 and 208,270 by the year 2032. (*See Appendix E. figures E.2 & E.3*)

Minorities (Black or African-American, American Indian, Asian, Pacific Islander, and Hispanic or Latino) accounted for nearly 13.5 % of the population in the region according to the 2010 U.S. Census. In May 2018 the Oregon Employment Department reported a shift is occurring across Oregon; minority populations are growing as a share of total population. The changing demographics are led by Portland Metro. Though it is still predominantly white, Oregon's population has started to diversify in recent years. In 2016, the share of people of color in Oregon grew to 24 percent, a 37 percent increase from 2006. This is still 15 percentage points lower than the national average, but the share of people of color in Oregon grew more quickly than nationwide average over this 10-year span. The share of Hispanic or Latino residents of any race in Oregon has increased more than any other racial or ethnic group, with a 39 percent increase in the past decade.

Similar to most rural areas in Oregon, the Population of all three counties is continuing to age due to the aging baby boom population and growth of the retirement age population (*See Appendix F. figure F.3*). The aging workforce and looming baby boomer retirements were an almost forgotten issue during the recession. Falling home values and decimated nest eggs forced many older workers to delay their retirement plans for a few years. Now the oldest of the baby boomers are reaching full retirement age and leaving the workforce. Their retirements could leave holes in the workforces of all industries, occupations, and counties. Effectively replacing the coming wave of retirees is one of the key workforce challenges facing Oregon (Oregon Employment Department).

The major driver behind Oregon's population gains over the past several years is net migration rather than natural increase (*See Appendix F. figures F.2*). Net migration is the difference between the number of folks who moved into the state and those who moved out. Natural increase is the difference between births and deaths. Oregon has largely been a net importer of people since the days of the Oregon Trail. Net migration is largely tied to economic conditions in Oregon. If there are jobs available, we tend to see a large surge in the population due to in-migration. The inverse is also true. The years with the lowest levels of net migration were during recessionary periods when unemployment was high and fewer job opportunities existed. (*See Appendix F. figures F.4*).

Around 87 percent of the state's population growth in the past year was due to net migration. We continue to see population growth from

natural increase. However, the combination of an aging population and declining family size is generally leading to a decreasing rate of natural increase. Back in the 1980s the state averaged a natural increase of nearly 16,000 people each year. So far this decade we have averaged a natural increase of only 10,230 each year. Our natural increase is slower due to an acceleration of deaths. Compared with the 1980s the number of births each year is up by around 8 percent, whereas the number of deaths is up by 41 percent. As the pace of natural increase slows we are increasingly relying on net migration for population growth.

Over the past six years, the region has experienced little population change. Only Harney (-1.4%) and Grant (-0.5%) showed less growth. During this period, natural increase was negative as deaths outnumbered births, 2.0 deaths per birth in Curry County, 1.4 in Coos County, and 1.3 deaths per birth in Douglas County. In Curry County, net migration pushed the population change to 1.1% as in-migrants outnumbered those leaving by 1,421. In Coos County net migration pushed the county's population change to 0.2 percent as in-migrants outnumbered those leaving by 1,665. This population churn corresponds with the economic contractions of the Great Recession and the subsequent period of slow recovery. Douglas County has experienced modest population growth – ranking 24th out of Oregon's 36 counties. Natural increase was negative. However, net migration pushed the county's population change to 2.5% as in-migrants outnumbered those leaving by 4,695. The rate of population change reflected the economic downturn of the Great Recession and the subsequent recovery. (See *Appendix F. figure F.2*)

Net migration is one of Oregon's competitive advantages as we have historically been able to attract new residents to the state, expanding the labor force. Despite this being one of our competitive advantages there are a few trends that threaten our ability to maintain these high levels of net migration. Housing affordability and availability top the list as many communities across the state need additional housing units, particularly those at a reasonable price.

Housing in Portland, Bend, rural Oregon, and the communities in between report prospective homebuyers are finding limited inventory, especially within the buyer's budget range. National news reports also tell of limited inventory as well as bidding wars. Pivotal to the matter is the shrinkage in number of new residential building permits in recent years and the associated decline in construction jobs. The U.S. Census Bureau's Residential Construction Branch studies new, privately owned residential construction by tracking the number and type of building permits issued.

When examining permits for the construction of new, privately owned residences in Coos, Curry, and Douglas counties, the ebb and flow of the overall economy is evident. With the exception of Coos County, there was a slight drop in permits in 2002, corresponding with a short-lived economic slowdown. By mid-decade, plans for building, as evidenced by the issuance of permits, had increased and peaked in 2005 at 841. Overall, building permits increased 47 percent between 2001 and 2005. The Great Recession, however, took its toll. The number of permits issued bottomed out in 2011 with only 137 permits issued across all three counties – an 84 percent drop from 2005 levels. Although permit issuance has increased by 76 percent since 2011, the 2015 level is still 71 percent below the 2005 peak. (See *Appendix G. figure G.1*)

Declines in building permits issued since 2005, coupled with the decline in construction employment, has resulted in fewer residential structures built. Additionally, the majority of the region's houses are at least 30 years old; 61 percent were built prior to 1980. Aging inventory,

especially in coastal and mountain climates, often present added maintenance issues and increased costs. These inventories and structural issues and population increases significantly contribute to the housing shortages experienced in rural southwestern Oregon.

In 2010 there was a total of 92,121 housing units in the region of which 82,131 were occupied leaving 9,990 vacant. Of the occupied units 55,527 were owner occupied and the remaining 26,604 were renter occupied (*See Appendix G. figure G.2*). Affordable housing and homelessness is a growing and evident concern in our region and throughout the state. Oregon Housing and Community Services indicate statewide households earning minimum wage must work at least 77 hours per week to afford a 2-bedroom apartment. 2016 data show 1 out of 3 of all renters are paying more than 50% of their income in rent and 3 out of 4 renters with extremely low incomes are paying more than 50% of their income in rent.

Educational Attainment data is provided for adults age 25 and over. Overall, the available data from the 2010 U.S. Census indicate that the Coos, Curry, Douglas region is less than statewide averages for bachelor's and advanced degrees (*See Appendix H. figure H.1 & H.2*). According to the Oregon Employment Department, in Coos County, the population with some college or an associate's degree increased by 6 percent, and those with a bachelor's degree or higher increased by 5 percent from 2009 to 2015. Curry County experienced even larger gains in its population's education levels – a 7 percent increase in those with some college or an associate's degree, and a 35 percent increase in those with a bachelor's degree or higher. Additionally, Douglas County experienced growth of 23 percent in its citizens having some college or an associate's degree, while those with a bachelor's degree or higher grew by 12 percent (*See Appendix H. figure H.3*).

Economic Indicators: Industry, Workforce, Employment and Income

The unemployment rates in each of the three counties improved from December 2016 to December 2017 and even more when compared to December of 2008-2013. Despite this, the unemployment rates in all three counties continue to remain above both the U.S and Oregon averages which indicate a tight labor market and workforce shortage (*See Appendix I. figure I.1 & I.2*).

The overall industry mix of the region tells only part of the story behind the region's recent economic resurgence. In Coos County the government sector accounts for one out of four jobs and in Curry and Douglas Counties, one out of five jobs. However, unique in Oregon, most of Coos and Curry's health care and education jobs are within local government districts. This legislative construct permits rural areas, not otherwise positioned to provide a full-range of services, to form and operate taxing districts to build schools, hospitals, etc. Thus, in addition to typical government functions, 37 percent of Coos and 38.3 percent of Curry County government jobs are dedicated to health care and another 23 percent (Coos) and 27.5 percent (Curry) are within education. Somewhat unique, Douglas County is not only home to a federal veteran's hospital, it also boasts a vital local government health care district in coastal Reedsport. By combining these public-sector jobs with those in private-sector education and health services, the largest source of employment is associated with education and health care. (*See Appendix I. figure I.4*)

The region's economy has weathered a number of economic downturns over the last 40 years. The core industries continue to show resilience. The strong education and health services sector, a combination of private and public sector entities, provides employment to a substantial number of county residents. The tourism industry with its strong retail trade, and leisure and hospitality components, offers not

only a variety of employment opportunities but serves to bring outside dollars into the area. The region is well positioned to continue its pattern of development on Oregon's south coast, Douglas county has become an economic and cultural hub in southwestern Oregon. (See Appendix J)

A Brief look over employment in the last decade for Coos, Curry and Douglas Counties, 2017: (See Appendix J)

Coos County:

- Peak Employment (2006): 23,666 jobs and 1,957 business units
- Trough (2010): 21,300 jobs and 1,903 business units
- This was a loss of 2,366 jobs (-10%) and 72 business units (-3.6%)

As of 2017:

- Still down 996 jobs from peak in 2006 and down 16 business units
- Purchasing power of county's total payroll jobs dropped 7.4%
- (2006-2010); total payroll is now 6.6% above previous peak value

Curry County:

- Peak Employment (2005): 7,044 jobs and 854 business units
- Trough (2011): 6,039 jobs and 802 business units
- This was a loss of 1,005 jobs (-14.3%) and 22 business units

As of 2017:

- Still down 514 jobs from peak in 2005 and down 22 business units
- Purchasing power of county's total payroll jobs dropped 11.7%
- (2005-2011); total payroll is still below (-1.1%) previous peak value

Douglas County:

- Peak Employment (2006): 39,657 jobs and 3,152 business units
- Trough (2012): 34,064 jobs and 2,855 business units
- This was a loss of 5,593 jobs (-14.1%) and 297 business units (-9.4%)

As of 2017:

- Still down 1,665 jobs from peak in 2006 but now have the same number of business units as peak
- Purchasing power of county's total payroll jobs dropped 4.8%
- (2006-2012) total payroll is still below (-0.2%) previous peak value

Economic forecasts indicate Southwestern Oregon's Douglas, Coos, and Curry counties join Oregon's north coast and far eastern counties with modest industry and occupational growth projections, 2017-2027. The anticipated seven percent job growth trails the state's ten-year projected growth rate of 12 percent. Only South-Central Oregon (Klamath and Lake counties) has a slower projected job growth (6%) for the ten-year period. These modest rates for the state's border counties are in stark contrast to the state's central high-growth area surrounding Bend, which boasts a robust 15 percent projected growth rate. Overall employment growth results from business development and expansion. Statewide, for every new job added by growing and expanding businesses, Oregon employers will have another nine job openings requiring newly trained workers to replace those who leave the labor force or make a major occupational change. In Southwestern Oregon, every new job added by business development and expansion will be matched by approximately 18 replacement openings. Private payrolls in Douglas, Coos, and Curry counties are expected to grow by 4,340 jobs (7%). Government employment will increase by 270 (2%), and self-employment will grow by 400 (10%). Altogether, the region's employment is expected to grow from 72,550 to 77,290.

As business conversations turn to the economic differences between rural and urban areas, it is common to hear about one county's per capita personal income (PCPI) compared with that of neighboring counties (*See Appendix K*). This indicator measures income from all sources in a given area, divided by the area's population. Although Oregon's PCPI is noticeably higher than Southwestern Oregon's three counties, the trends follow the same general pattern: peaking around 2007, declining during the Great Recession, slight growth in 2010 through 2012, and a short-lived drop-off before easing into sustained growth since 2013.

The U.S. Department of Commerce, Bureau of Economic Analysis released its 2016 estimates of personal income for sub-state areas (counties and townships) in late November 2017. Oregon ranked 28th in the nation (92% of national average) at \$49,246. This reflected an increase of 2.4 percent from 2015.

In 2016, Coos County's per capita personal income was \$39,769. This level ranked 17th out of 36 counties in Oregon and was 88 percent of Oregon's average. This reflected a 2.3 percent increase since 2015 – very close to that of the state. Curry County's PCPI was \$39,555; this ranked 19th in the state and reflected a 1.0 percent increase since the previous year. Although Douglas County's PCPI was the lowest of the three counties, its 3.0 percent increase since 2015 was the highest in this region. At \$37,077, Douglas County ranked 29th in the state. As useful as rankings and PCPI dollar values are, the components of personal income provide different and helpful insights into each county's overall economy. Some components are more influenced by availability of local jobs; others by dynamics of local populations, such as having relatively more youth or retirees in a given area, or faster (or slower) population growth. U.S. Census Bureau's 2012-2016 5-year estimates show the mean income for all households in Oregon are \$72,013 with Coos County at \$55,109, Curry County \$51,573 and Douglas County at \$55,965 (*See Appendix K, Figure K.2*).

In July 2018 the Oregon Employment Department reported that over the past two and a half decades, the distribution of wage income in the State of Oregon has continued to become more unequal. In 2017, employees who worked all four quarters of the year earned a total of more than \$83.4 billion in covered wages, an (inflation-adjusted) increase of nearly \$43 billion over 1990. The number of four-quarter workers rose by 60 percent during that time, with the average four-quarter inflation-adjusted wage rising from \$42,000 to \$54,000. The gains in wage income, however, have not been evenly shared by all workers. High-wage workers' slice of the wage pie has increased in size, while that of low- and middle-wage workers has shrunk (*See appendix L, Figures L.1 & L.2*).

EVALUATION FRAMEWORK

The CEDS Strategy Committee has met, as well as corresponded, during this CEDS process. A Survey was handed out, emailed, approved, on CCD's website and mailed to not only the CEDS Strategy Committee, but also to organizations and individuals who have an interest in regional economic health and growth.

Survey questions asked were:

- What do you see as ASSETS or STRENGTHS supporting economic development in our region?
- What do you see as WEAKNESSES or CONSTRAINTS hindering economic development in our region?
- What are the most important issues impacting economic development in our region?
- What areas should be focused on to STRENGTHEN our region's resilience (economic or otherwise)?
- If you are a business owner or entrepreneur, what do you need to expand or develop your business?

Survey participants were given 5 choices for the questions, which targeted income, labor force, business, housing, workforce, infrastructure, regulatory entrepreneurial environment, and were good at taking the time to elaborate on why they chose an answer, giving pros and cons, etc. They were very vested in the survey. CCD took all returned surveys (over 40), tallied up results, noted all additional comments, and incorporated them into the SWOT.

Coos, Curry, and Douglas counties have a lot in common, yet many differences. This rang true while tallying surveys—for instance, transportation infrastructure in most of Douglas County is seen as a strength, with Interstate 5, rail, accessibility to airports. However, Curry County is more isolated, it takes more time to merely get over to I-5, roadways and rail infrastructure fails in the winter, on occasion.

ANSWERS AND COMMENTS were sorted, and the SWOT was drafted from that.

CCD staff drafted the CEDS, compiling the SWOT, Goals, Direction, Action Plans, and Resiliency Plan, so the committee could study it and meet to finalize the draft. CCD accumulated the data and put it in draft form, however it's the various committee members and leaders that know their specific areas the best, and that input is vital to this CEDS process and a useable CEDS document.

Draft #1 CEDS was reviewed at a CEDS Committee Meeting in Coos Bay, Oregon, on July 16, 2018.

Draft #2 CEDS was reviewed at a CEDS Committee Meeting in Coos Bay, Oregon, on August 1, 2018. This was emailed out to CEDS Committee on August 7, 2018, for review, with a deadline of August 10, 2018. Final corrections then were made. CEDS will be approved at CCD Business Development Corporation's August 16, 2018 Board of Commissioner's Meeting.

The approved CEDS will then be submitted to EDA.

COMMITTEE MEMBERS FOR COOS, CURRY, DOUGLAS COUNTIES'

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

CEDS Strategy Committee (December 2016)

Barb Bauder, Bay Area Hospital
Jessica Engelke, Southwestern Oregon Community College (SWOCC)
John Burns, International Port of Coos Bay
Jennifer Groth, Southwestern Oregon Regional Airport
Susan Brown, Curry County
Summer Matteson, Curry County
Melissa Cribbins, Coos County
Chris Boice, Douglas County Commissioner
Jodi Fritts, City of Gold Beach
Lance Colley, City of Roseburg
Donna Nichols, Jordan Cove
Connie Stopher, South Coast Development Council (SCDC)
Annette Shelton-Tideman, Oregon Employment Department
Mike Lehman, Oregon Coast Community Action (ORCCA)
Arlene Soto, Small Business Development Center (SBDC)
Michelle Martin, Neighborworks Umpqua
Judy Duffy, Coquille Economic Development Corporation (CEDCO)

ADDITIONS to CEDS Strategy Committee (June, 2018)

Charmaine Vitak, Port of Umpqua
Court Boice, Curry County Commissioner
Carolyn Johnson, Curry County Economic Development
Shaun Gibbs, South Coast Development Council (SCDC)
Sam Baugh, South Coast Development Council (SCDC)
Loretta Kuehn, Coquille Economic Development Corp (CEDCO)
John Bacon, Small Business Development Center (SBDC)
Jonathon Wright, City of Reedsport

OTHER DOCUMENTS

CCD works with other economic development departments within our cities, counties, state, and nationwide. CCD continues to be involved with these agencies to learn about their thoughts and goals. We all utilize and learn from each other's tools, reports, plans, programs, and presentations.

Below is a partial list of documents that we all study and use as economic tools:

Oregon Business Plan—2018 Policy Playbook

Prosperity for all Oregonians—Business Oregon Strategic Plan—2018-2022

Perceptions and Needs of Economic Development Programs in Oregon

Department of Planning, Public Policy & Management, UofO

Listening to Rural Voices—A Summary of Common Priorities Identified by Rural Oregonians

ORDC—Oregon Rural Development Council

Priorities, Projects, and Plans—REGIONAL SOLUTIONS Projects Reports—Coos, Curry, and Douglas Counties

Alex Campbell, Governor's Coordinator

Umpqua Economic Development Partnership

South Coast Development Council

Bay Area Hospital—Strategic Plan 2017-2019

Coos County Community Health Assessment 2018

...as well as strategic plans from our region. Plans of these sorts change constantly, and we continually research for the latest plans for our community, region, or organization.

Figure A.1

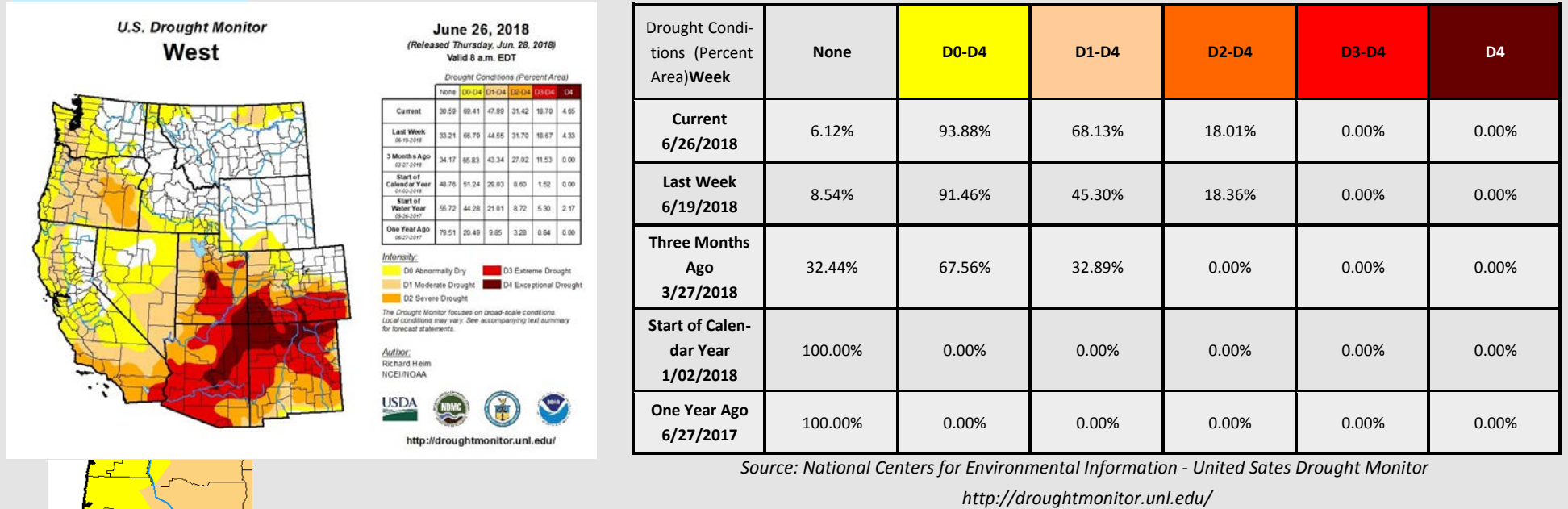
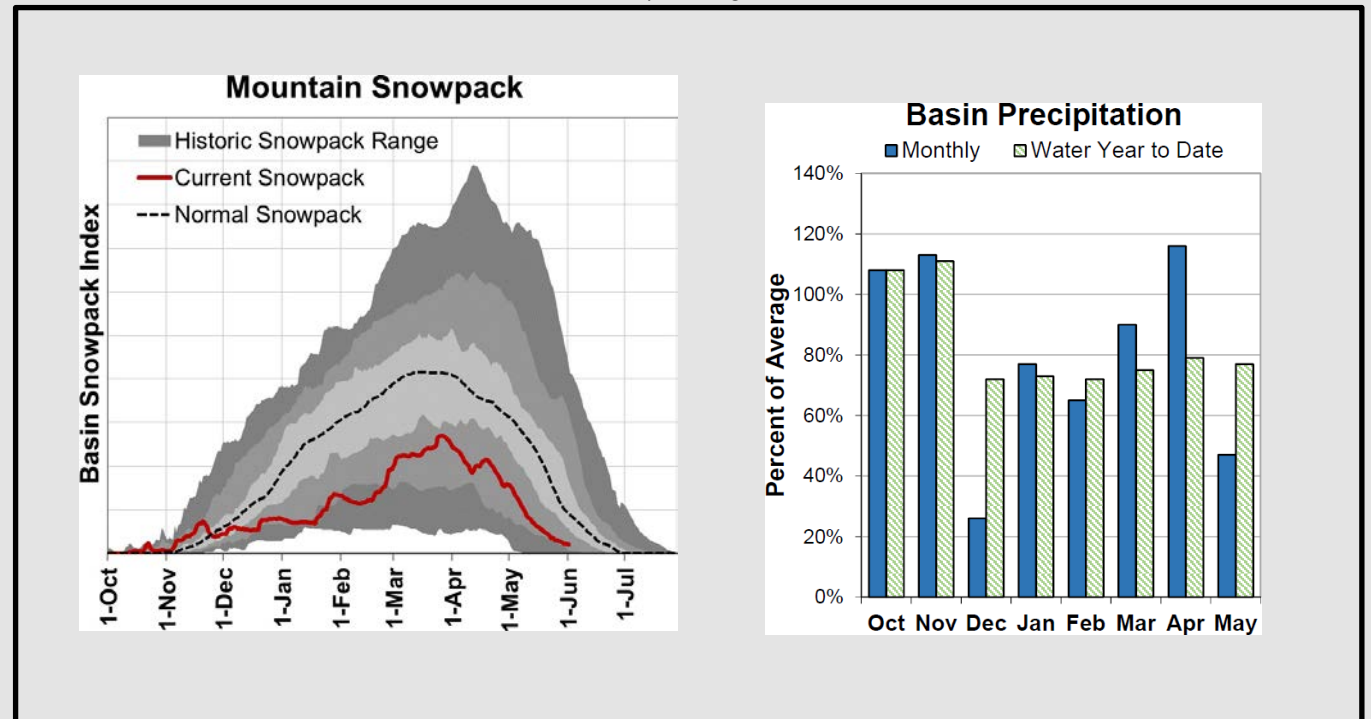


Figure A.2

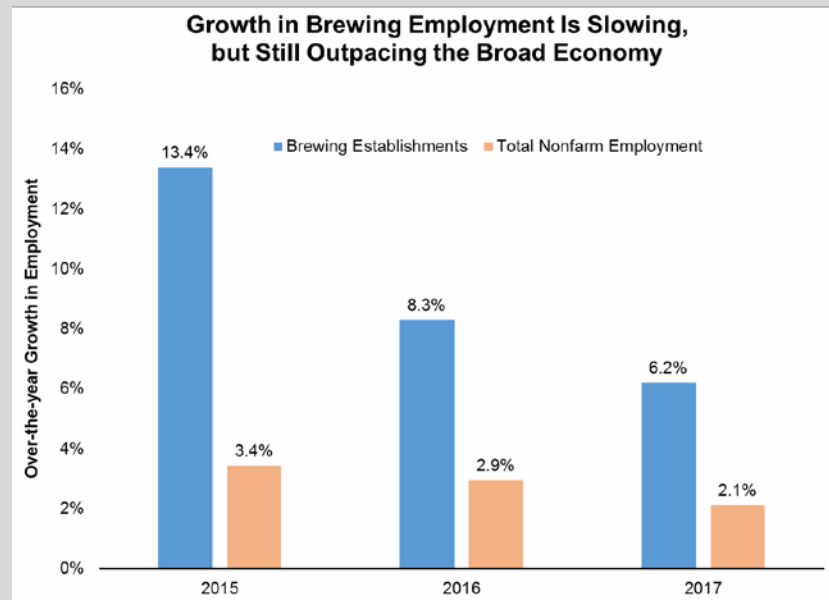
Source:

Oregon Basin Outlook Report, United States Department of Agriculture/Natural Resource Conservation Service, June 1, 2018



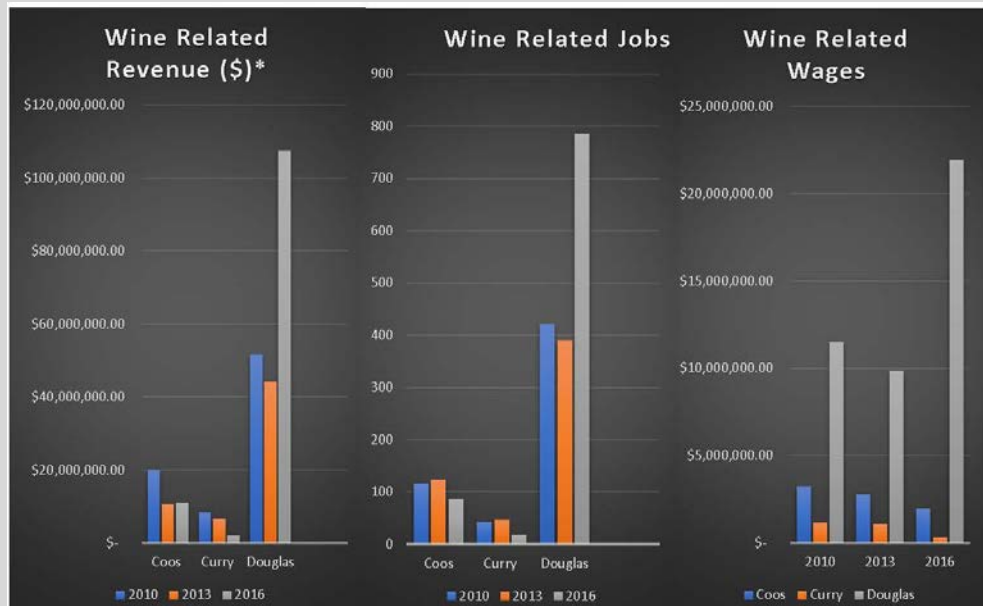
Appendix B.

Figure B.1



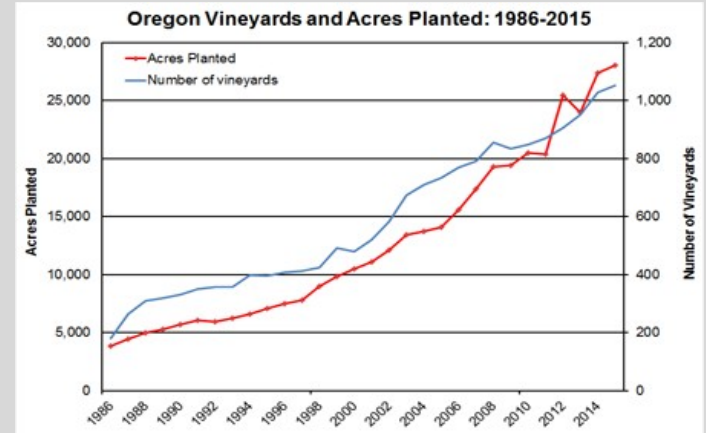
Source: Oregon Employment Department

Figure B.3.



Source: (Economic Impact Studies, Full Glass Research/The Oregon Wine Board)
<https://industry.oregonwine.org/>

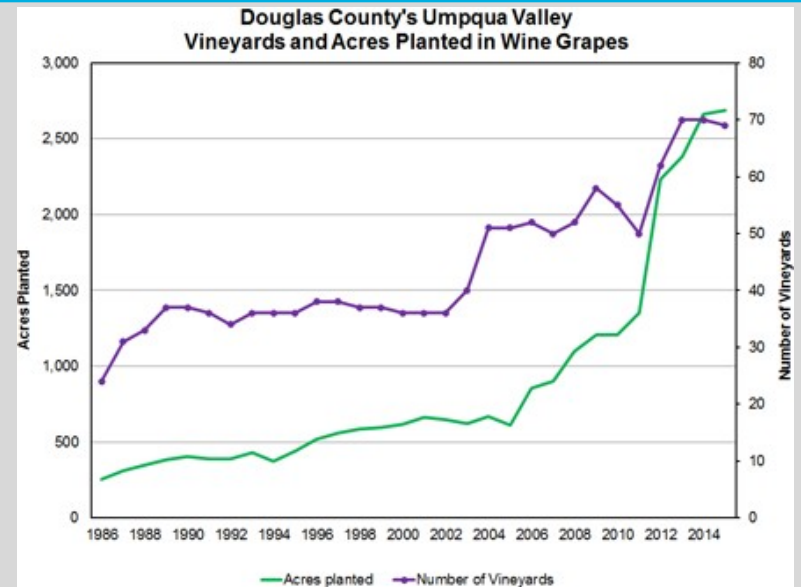
Figure B.2



2015 Oregon Wine Grapes: Vineyards, Acreage, Yield, and Production by Growing Region and County

Growing Region	Number of Vineyards	All Planted Acreage	Harvested Acreage	Yield Per Harvested Acre (in tons)	Production (in tons)
N. Willamette Valley	606	16,993	15,143	3.51	53,089
S. Willamette Valley	109	2,785	2,438	3.54	8,618
Umpqua Valley	69	2,688	2,443	3.62	8,837
Rogue Valley	164	3,313	2,856	3.23	9,220
Columbia River & At Large	104	2,254	1,862	2.79	5,185
Total	1,052	28,034	24,742	3.43	84,949

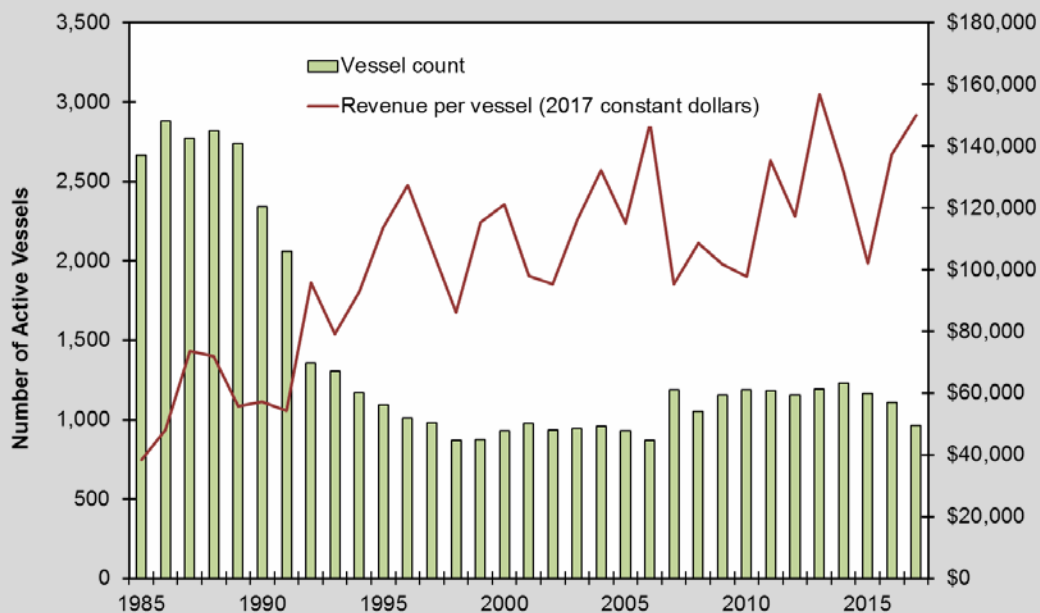
Source: 2015 Oregon Vineyard & Winery Census Report, Southern Oregon University Research Center (SOURCE); August 2016.



Source: Oregon Employment Department

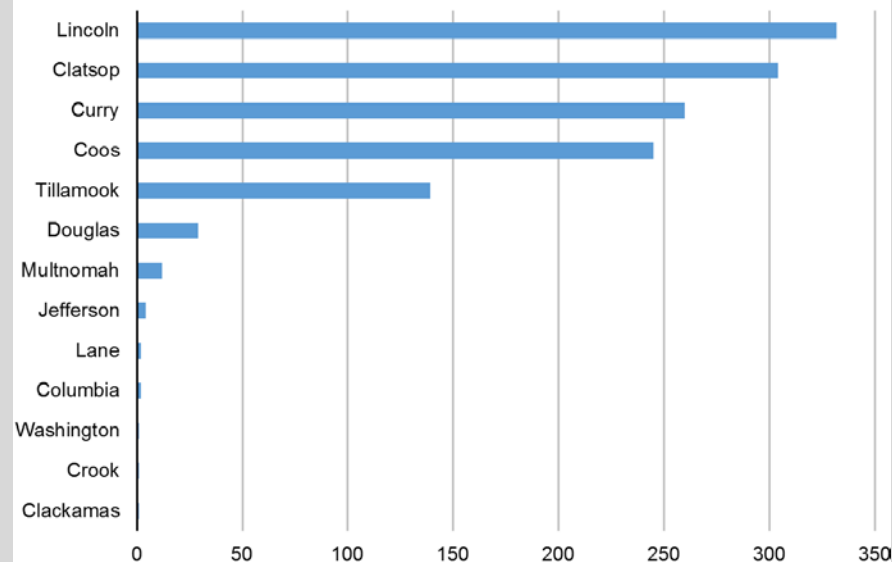
Appendix C.

Count of Fishing Vessels and Revenue per Vessel



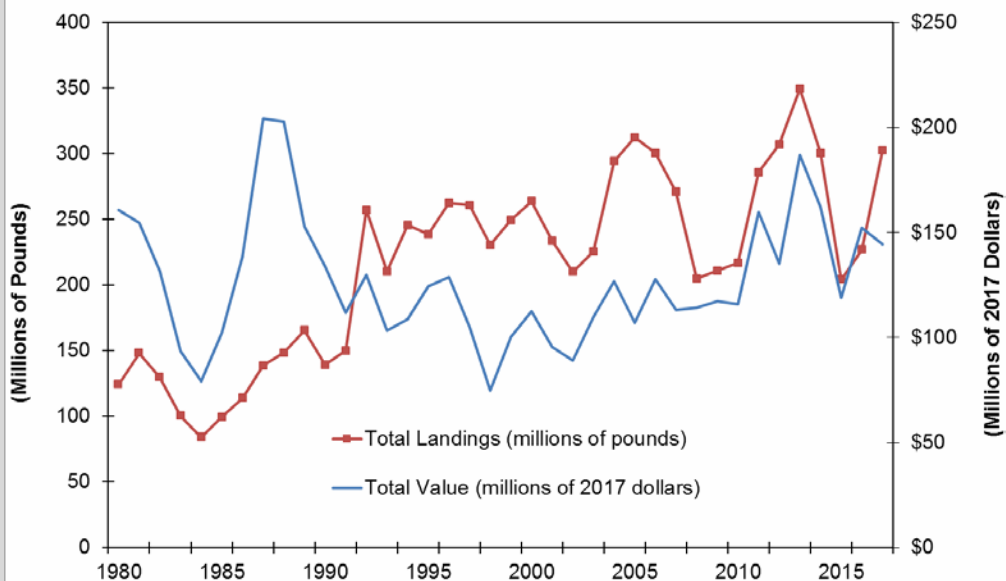
Source: PacFin and Oregon Department of Fish and Wildlife

2017 Annual Average Employment in Commercial Fishing, Excluding Tribal Employment



Source: Oregon Department of Fish and Wildlife, Oregon Employment Department

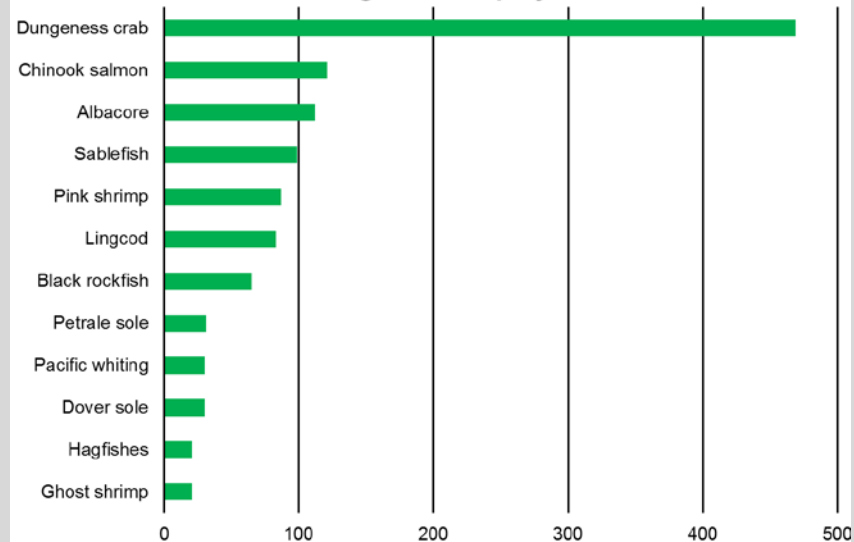
Oregon Commercial Fishing Landings and Revenue



Source: PacFin and the Oregon Department of Fish and Wildlife

Source: Oregon Employment Department

2017 Annual Average Commercial Fishing Employment, Excluding Tribal Employment



Source: Oregon Department of Fish and Wildlife and Oregon Employment Department

Appendix D

State and National Hwy System

Figure D.1

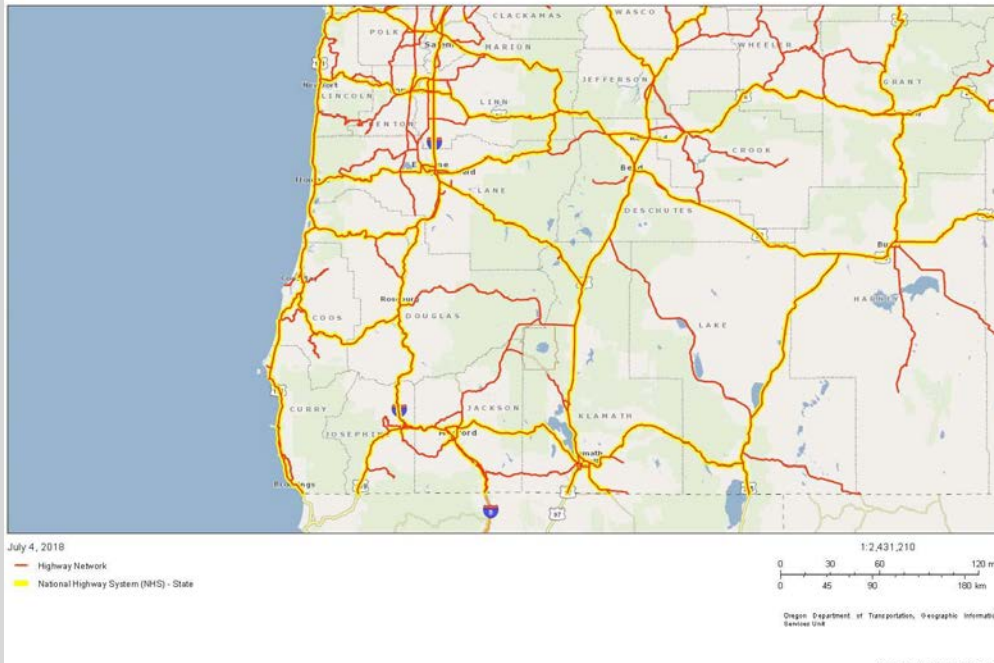
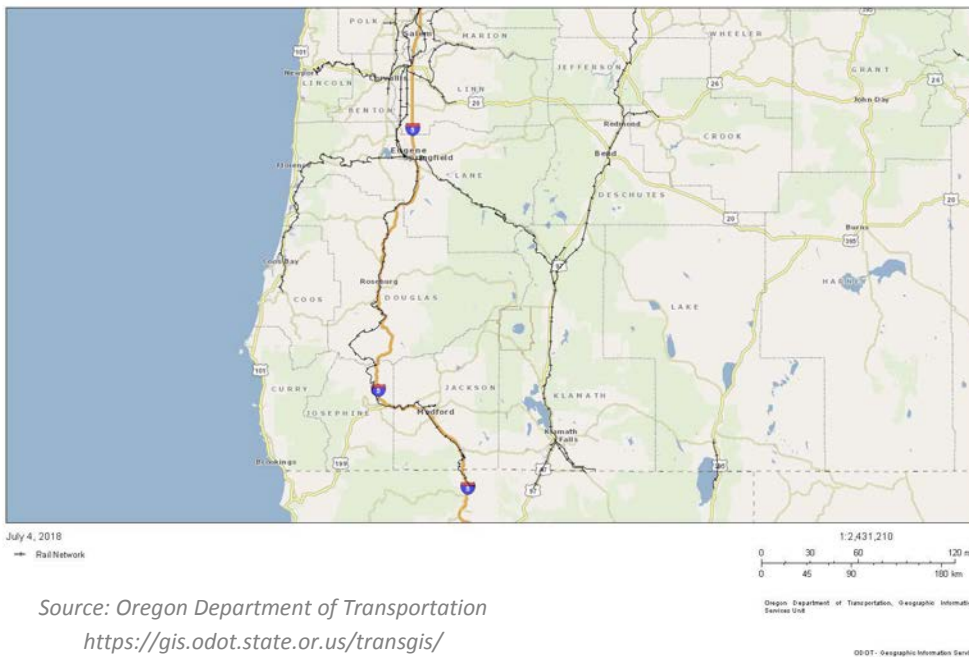


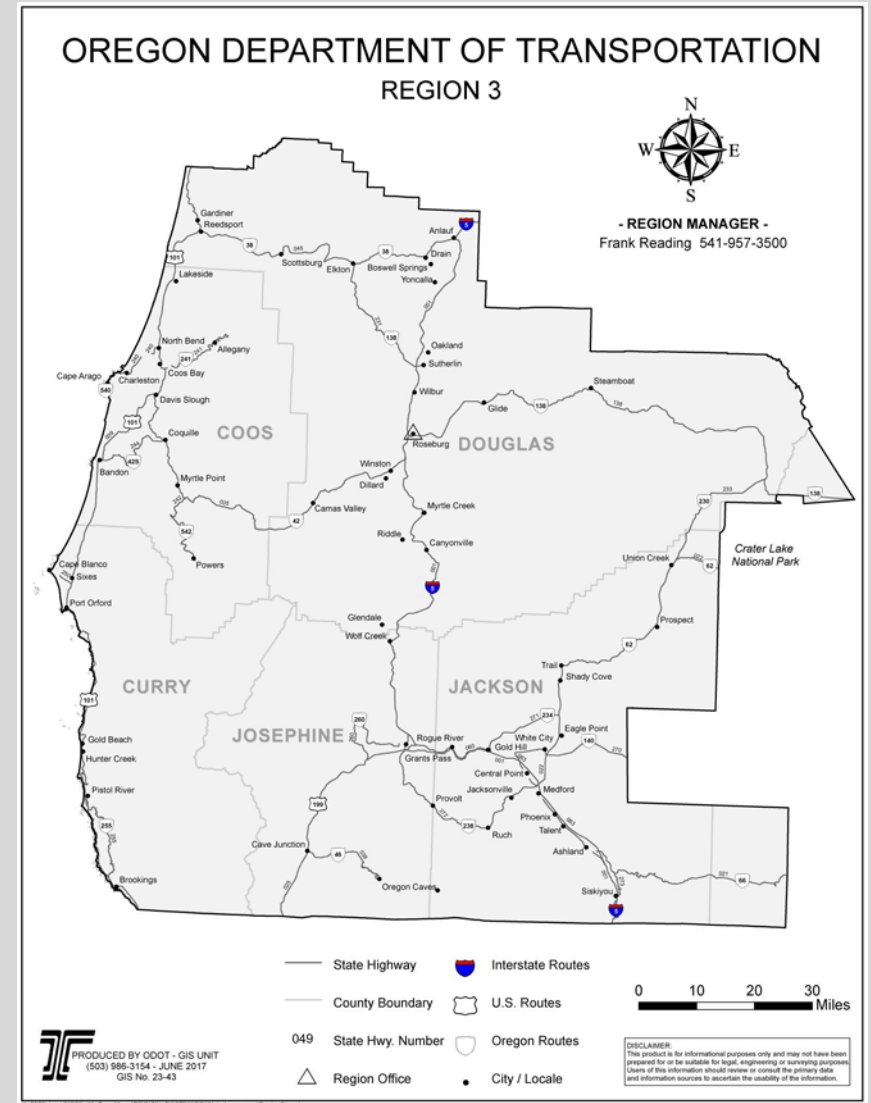
Figure D.3

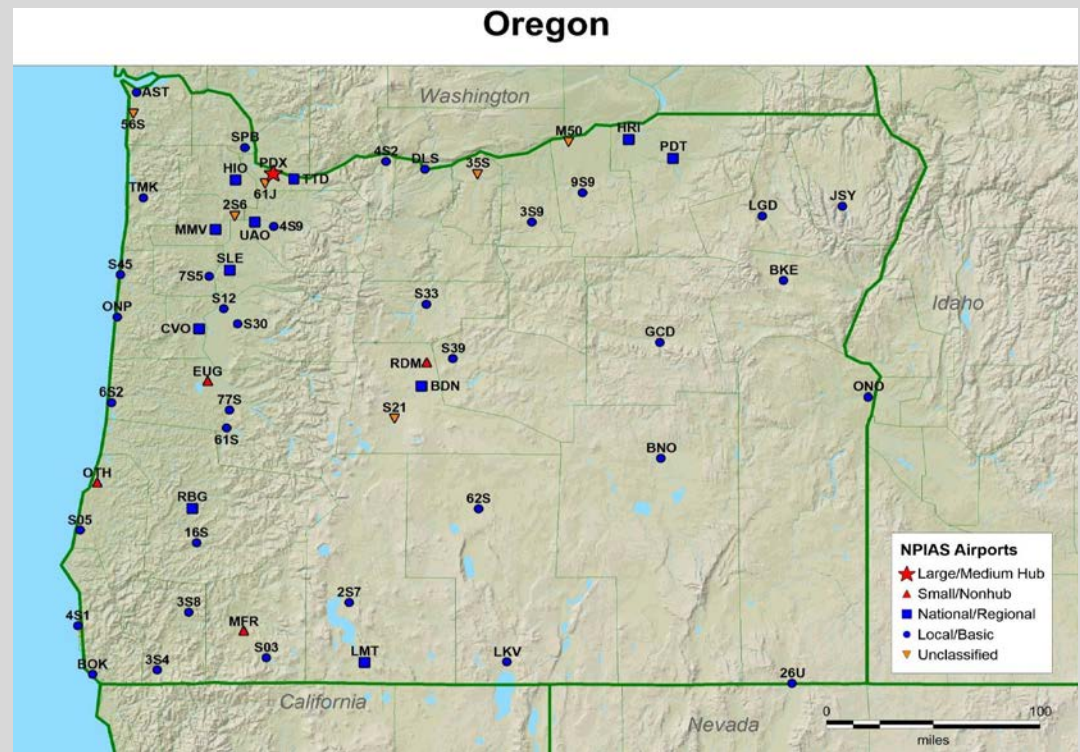
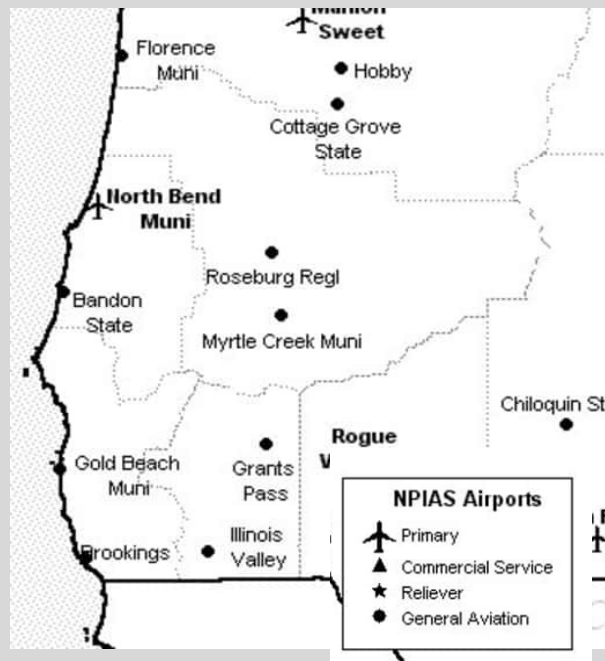
Rail Network, South West Oregon



Source: Oregon Department of Transportation
<https://gis.odot.state.or.us/transgis/>

Figure D.2





Source: Federal Aviation Administration/National Plan of Integrated Airport Systems

https://www.faa.gov/airports/planning_capacity/npis/reports/

Figure E.2

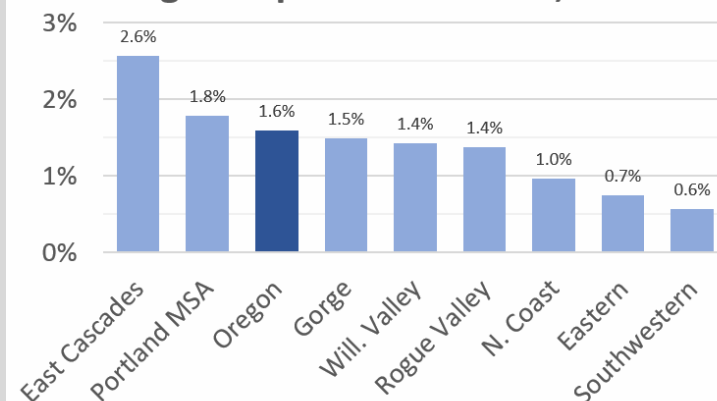
	2010 Census	2018 PSU	2032 PSU
State	3,831,074		
Region	193,074	198,707	208,270
Coos	63,043	63,471	63,734
Curry	22,364	22,888	24,110
Douglas	107,667	112,348	120,426

Source: 2010 U.S. Census

2018-2068 Population Forecasts, Population Research Center, Portland State University (PSU)

Oregon Population Growth, 2017

Figure E.3



N. Coast: Clatsop, Lincoln, Tillamook | Portland MSA: Clackamas, Columbia, Multnomah, Washington, Yamhill | Willamette Valley: Benton, Lane, Linn, Marion, Polk | Gorge: Gilliam, Hood River, Sherman, Wasco, Wheeler | Southwestern: Coos, Curry, Douglas | Rogue Valley: Jackson, Josephine | East Cascades: Crook, Deschutes, Jefferson, Klamath, Lake | Eastern: Baker, Grant, Harney, Malheur, Morrow, Umatilla, Union, Walla | Source: Portland State, Oregon Office of Economic Analysis

Source: Oregon Employment Department

Appendix F.

Figure F.1

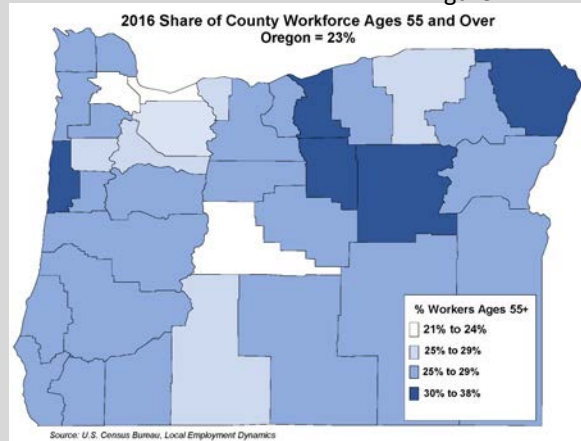


Figure F.2

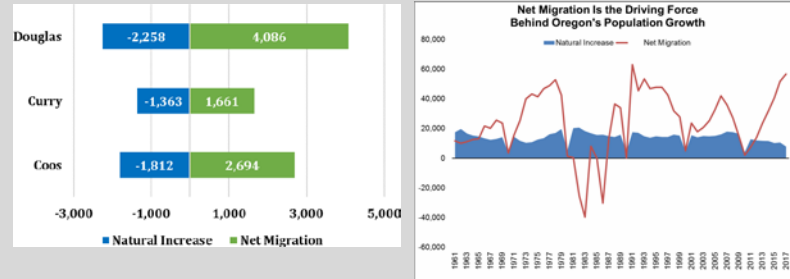
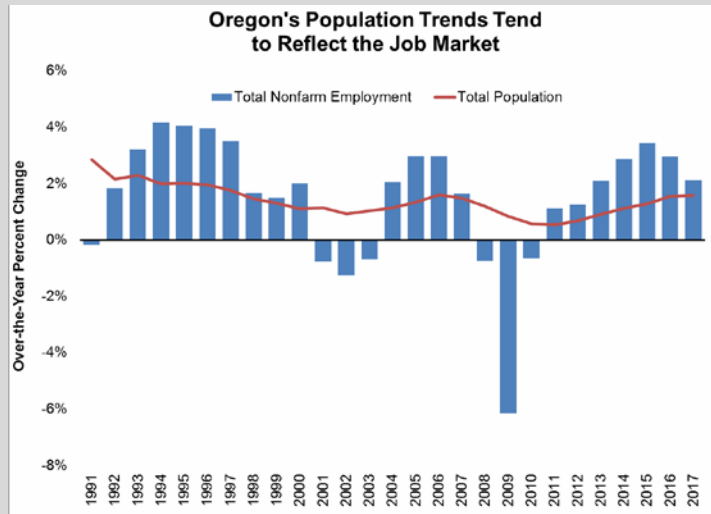


Figure F4



Coos County Components of Population Change

	July 1, 2016 Population Estimate	April 1, 2010 Census Population	Population Change 2010-16	Percent Change 2010-16	Average Annual Change Since Census	Births 2010-16	Deaths 2010-16	Natural Increase 2010-16	Net Migration 2010-16
Oregon	4,076,350	3,831,074	245,276	6.4%	1.0%	284,082	210,680	73,402	171,874
Coos	63,190	63,043	147	0.2%	0.0%	3,892	5,411	-1,518	1,665

Source: Portland State University, Population Research Center

Curry County Components of Population Change

	July 1, 2016 Population Estimate	April 1, 2010 Census Population	Population Change 2010-16	Percent Change 2010-16	Average Annual Change since Census	Births 2010-16	Deaths 2010-16	Natural Increase 2010-16	Net Migration 2010-16
Oregon	4,076,350	3,831,074	245,276	6.4%	1.0%	284,082	210,680	73,402	171,874
Curry County	22,600	22,364	236	1.1%	0.2%	1,141	2,326	-1,185	1,421

Source: Portland State University, Population Research Center

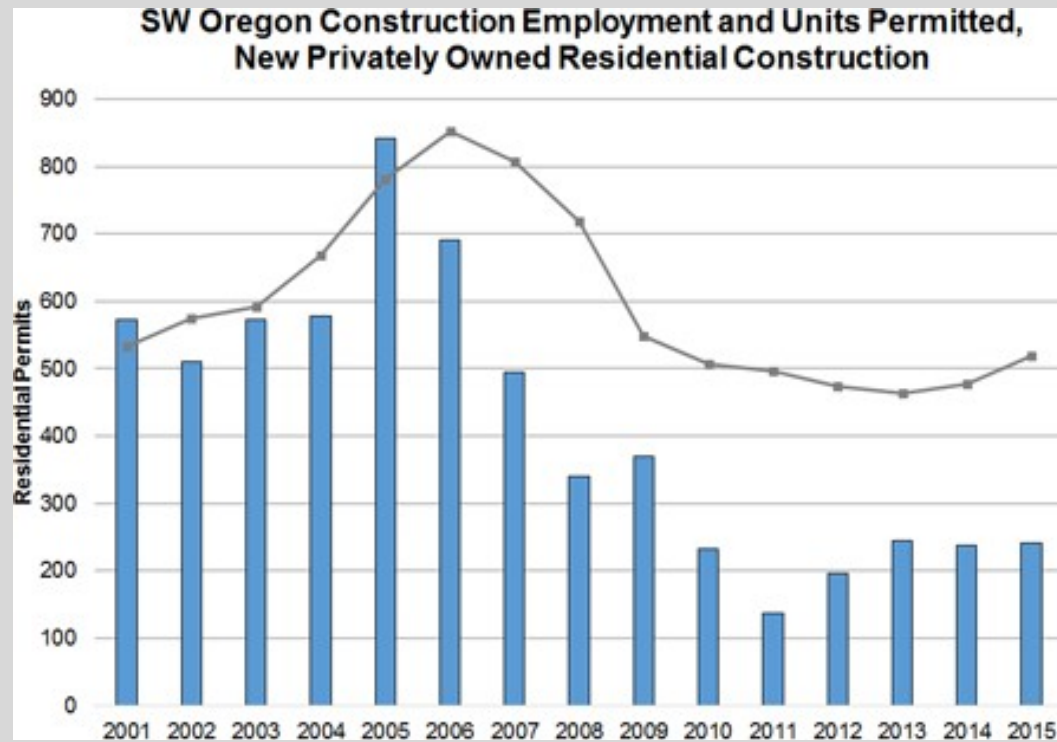
Douglas County Components of Population Change

	July 1, 2016 Population Estimate	April 1, 2010 Census Population	Population Change 2010-16	Percent Change 2010-16	Average Annual Change Since Census	Births 2010-16	Deaths 2010-16	Natural Increase 2010-16	Net Migration 2010-16
Oregon	4,076,350	3,831,074	245,276	6.4%	1.0%	284,082	210,680	73,402	171,874
Douglas	110,395	107,667	2,728	2.5%	0.4%	6,789	8,757	-1,967	4,695

Source: Portland State University, Population Research Center

Source: Oregon Employment Department

Figure G.1



Source: Oregon Employment Department

	Total Housing Units	Occupied Housing	Vacant Housing	Owner Occupied	Renter Occupied
Region	92,121	82,131	9,990	55,527	26,604
Coos County	30,593	27,133	3,460	17,800	9,333
Curry County	12,613	10,417	2,196	7,217	3,200
Douglas County	48,915	44,581	4,334	30,510	14,071

Source: 2010 U.S. Census

Appendix H.

Figure H.1

Subject	Oregon												
	Total		Percent		Males		Percent Males		Females		Percent Females		
	Estimate	Margin of Estimate	Estimate	Margin of Estimate	Estimate	Margin of Estimate	Estimate	Margin of Estimate	Estimate	Margin of Estimate	Estimate	Margin of Estimate	
Population 25 years and over	2,755,786		+/-681	(X)	(X)	1,343,913	+/-676	(X)	(X)	1,411,873	+/-576	(X)	
Less than 9th grade	106,505		+/-2,721	3.9%	+/-0.1	54,517	+/-1,719	4.0%	+/-0.1	52,388	+/-1,691	3.7%	+/-0.1
9th to 12th grade, no diploma	169,093		+/-3,083	16.6%	+/-0.1	81,668	+/-1,969	6.7%	+/-0.1	79,435	+/-1,842	5.8%	+/-0.1
High school graduate (includes Some college, no degree)	657,520		+/-2,734	23.5%	+/-0.2	327,531	+/-3,300	24.4%	+/-0.2	326,989	+/-2,471	23.5%	+/-0.2
Associate's degree	721,059		+/-5,372	28.2%	+/-0.2	342,927	+/-3,700	25.5%	+/-0.3	378,132	+/-3,432	26.8%	+/-0.2
Associate's degree	234,336		+/-2,851	8.5%	+/-0.1	107,040	+/-1,937	8.0%	+/-0.1	127,296	+/-2,687	9.0%	+/-0.2
Bachelor's degree	536,977		+/-4,736	19.6%	+/-0.2	260,358	+/-3,039	19.4%	+/-0.2	278,619	+/-3,135	19.7%	+/-0.2
Graduate or professional	327,396		+/-4,283	11.9%	+/-0.2	161,382	+/-2,900	12.0%	+/-0.2	166,014	+/-2,592	11.8%	+/-0.2
Percent high school graduate or Percent Bachelor's degree or	(X)		(X)	90.0%	+/-0.2	(X)	(X)	89.2%	+/-0.2	(X)	(X)	90.7%	+/-0.2
	(X)		(X)	31.4%	+/-0.2	(X)	(X)	31.4%	+/-0.3	(X)	(X)	31.5%	+/-0.3

Subject	Coos County, Oregon											
	Total		Percent		Males		Percent Males		Females		Percent Females	
	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error
Population 25 years and over	46,814	+/-169	(X)	(X)	22,737	+/-143	(X)	(X)	23,877	+/-106	(X)	(X)
Less than 9th grade	1,118	+/-282	2.4%	+/-0.6	774	+/-229	3.4%	+/-1.0	344	+/-108	1.4%	+/-0.5
9th to 12th grade, no diploma	4,035	+/-471	8.7%	+/-1.0	2,074	+/-322	9.1%	+/-1.4	1,961	+/-307	8.2%	+/-1.3
High school graduate (includes some college, no degree)	15,767	+/-795	32.4%	+/-1.7	7,707	+/-525	33.9%	+/-2.3	7,418	+/-591	31.1%	+/-2.5
Associate's degree	4,013	+/-401	8.6%	+/-0.9	1,642	+/-259	7.2%	+/-1.1	2,371	+/-283	9.9%	+/-1.2
Bachelor's degree	5,112	+/-438	11.0%	+/-0.9	2,648	+/-254	11.6%	+/-1.1	2,454	+/-301	10.3%	+/-1.3
Graduate or professional	3,444	+/-498	7.4%	+/-1.1	1,718	+/-287	7.6%	+/-1.3	1,726	+/-313	7.2%	+/-1.3
Percent high school graduate or better	(X)	(X)	88.9%	+/-1.2	(X)	(X)	87.5%	+/-1.8	(X)	(X)	90.3%	+/-1.4
Percent bachelor's degree or better	(X)	(X)	18.4%	+/-1.5	(X)	(X)	19.2%	+/-1.6	(X)	(X)	17.5%	+/-2.0

Subject	Curry County, Oregon											
	Total		Percent		Males		Percent Males		Females		Percent Females	
	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error
Population 25 years and over	17,756	+/-134	(X)	(X)	8,495	+/-100	(X)	(X)	8,261	+/-124	(X)	(X)
Less than 9th grade	585	+/-194	3.3%	+/-1.1	334	+/-143	3.9%	+/-1.7	251	+/-124	2.7%	+/-1.3
9th to 12th grade, no diploma	1,249	+/-325	7.0%	+/-1.8	540	+/-180	6.4%	+/-2.1	709	+/-203	7.7%	+/-2.2
High school graduate (includes	4,905	+/-488	27.6%	+/-2.6	2,454	+/-302	28.9%	+/-3.6	2,451	+/-307	28.5%	+/-3.2
Some college, no degree	5,236	+/-471	29.5%	+/-2.6	2,442	+/-304	28.7%	+/-3.5	2,794	+/-316	30.2%	+/-3.5
Associate's degree	1,595	+/-297	9.0%	+/-1.7	759	+/-200	8.9%	+/-2.3	836	+/-196	9.0%	+/-2.1
Bachelor's degree	2,596	+/-419	14.6%	+/-2.3	1,252	+/-313	14.7%	+/-3.6	1,344	+/-248	14.5%	+/-2.6
Graduate or professional	1,590	+/-230	9.0%	+/-1.3	714	+/-154	8.4%	+/-1.8	876	+/-163	9.5%	+/-1.8
Percent high school graduate or	(X)	(X)	89.7%	+/-2.1	(X)	(X)	89.7%	+/-2.7	(X)	(X)	89.6%	+/-2.4
Percent bachelor's degree or	(X)	(X)	23.6%	+/-2.8	(X)	(X)	23.1%	+/-3.8	(X)	(X)	24.0%	+/-3.3

Subject	Douglas County, Oregon											
	Total		Percent		Males		Percent Males		Females		Percent Females	
	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error
Population 25 years and over	78,662	+/-137	(X)	(X)	38,111	+/-126	(X)	(X)	40,551	+/-165	(X)	(X)
Less than 9th grade	2,216	+/-318	2.8%	+/-0.4	1,057	+/-218	2.8%	+/-0.6	1,159	+/-210	2.9%	+/-0.6
9th to 12th grade, no diploma	6,359	+/-554	8.1%	+/-0.7	3,448	+/-355	9.0%	+/-0.9	2,911	+/-344	7.2%	+/-0.9
High school graduate (includes	25,509	+/-851	32.4%	+/-1.2	12,709	+/-720	33.3%	+/-1.9	12,800	+/-592	31.5%	+/-1.4
Some college, no degree	24,402	+/-1,003	31.0%	+/-1.3	11,022	+/-836	28.9%	+/-1.7	13,380	+/-701	33.0%	+/-1.7
Associate's degree	7,359	+/-602	9.4%	+/-0.8	3,320	+/-339	8.7%	+/-0.9	4,039	+/-474	10.0%	+/-1.2
Bachelor's degree	7,867	+/-865	10.0%	+/-0.8	4,094	+/-433	10.7%	+/-1.1	3,773	+/-385	9.3%	+/-0.9
Graduate or professional	4,980	+/-542	6.3%	+/-0.7	2,461	+/-351	6.5%	+/-0.9	2,519	+/-346	6.2%	+/-0.9
Percent high school graduate or	(X)	(X)	89.1%	+/-0.8	(X)	(X)	88.2%	+/-1.2	(X)	(X)	90.0%	+/-0.9
Percent bachelor's degree or	(X)	(X)	16.3%	+/-1.0	(X)	(X)	17.2%	+/-1.4	(X)	(X)	15.5%	+/-1.2

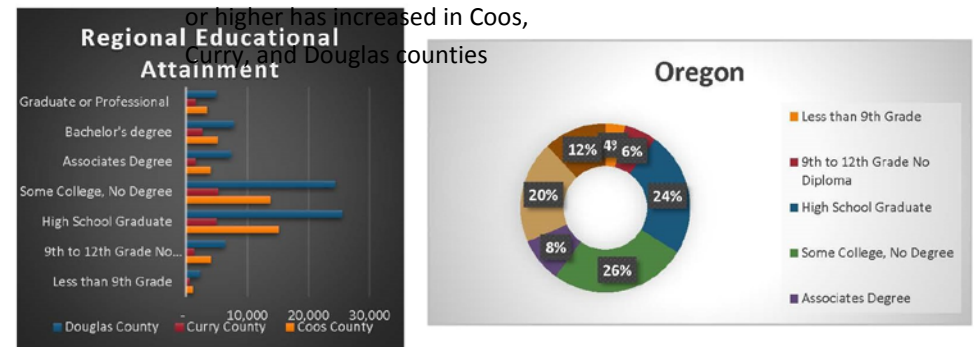
In January 2017, the Oregon Employment Department reported Post-Secondary Education Level Growth in Southwestern Oregon from 2009 to 2015. The report said according to the U.S. Census Bureau, the number of individuals having some college schooling, an associate's degree, or a bachelor's degree. Not to be confused with the rate of graduation across these tiers of education, these numbers offer a snapshot of each county's population holding a certain level of education at that given time.



Source: 2010 U.S. Census

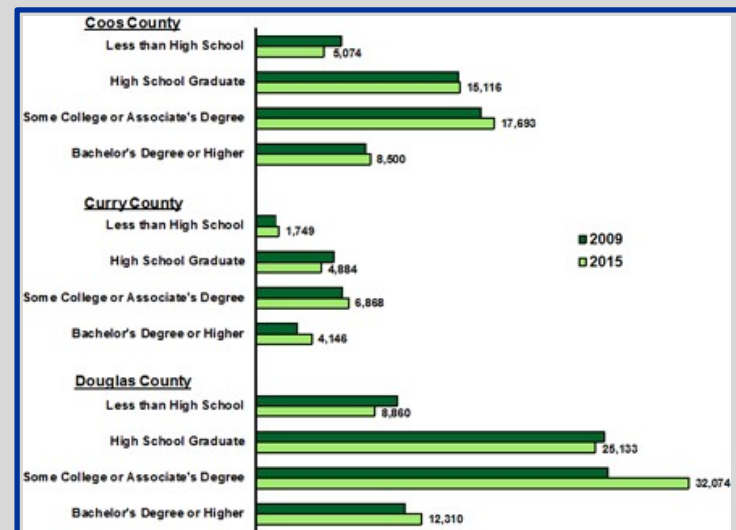
Figure H.2

	Less than 9th Grade	9th to 12th Grade No Diploma	High School Graduate	Some College, No Degree	Associates Degree	Bachelor's degree	Graduate or Professional
Coos County	1,118	4,035	15,125	13,767	4,013	5,112	3,444
Curry County	585	1,249	4,905	5,236	1,595	2,596	1,590
Douglas County	2,216	6,359	25,509	24,402	7,359	7,868	4,980



	Less than 9th Grade	9th to 12th Grade No Diploma	High School Graduate	Some College, No Degree	Associates Degree	Bachelor's degree	Graduate or Professional
Oregon	106,505	169,993	657,520	721,059	234,336	538,977	327,396

Figure H.3



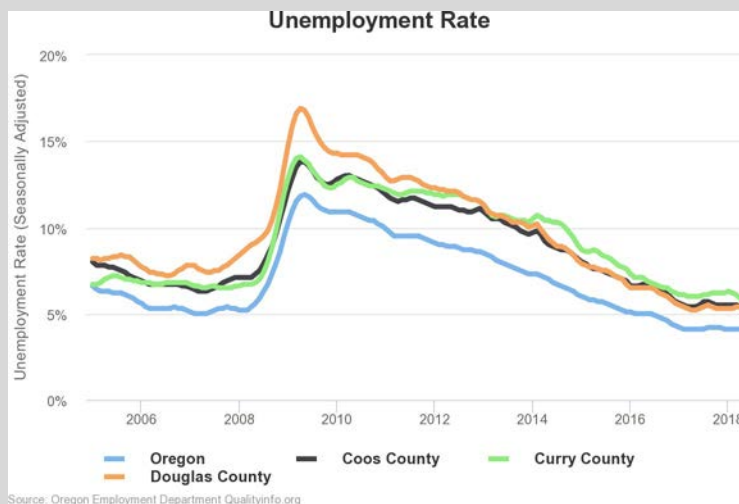
Source: Oregon Employment Department

Appendix I.

Figure I.1

Year	US Dec	Oregon Dec	Coos Dec	Curry Dec	Douglas Dec
2008	7.3	9.5	11.3	12.0	13.5
2009	9.9	10.9	12.6	12.3	14.3
2010	9.3	10.1	12.1	12.3	13.2
2011	8.5	9.2	11.3	12.0	12.3
2012	7.9	8.6	11.1	11.5	11.5
2013	6.7	7.3	9.6	10.3	10.0
2014	5.6	6.1	8.2	9.0	8.1
2015	5.0	5.1	6.9	7.6	6.7
2016	4.7	4.3	5.7	6.2	5.6
2017	4.1	4.1	5.5	6.2	5.3

Figure I.2



Total Nonfarm Employment

Indexed to Show Job Growth Over Time, Base Year 2005

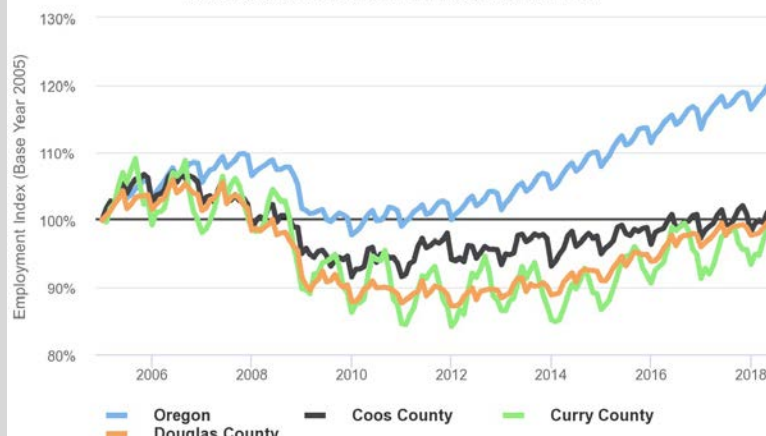
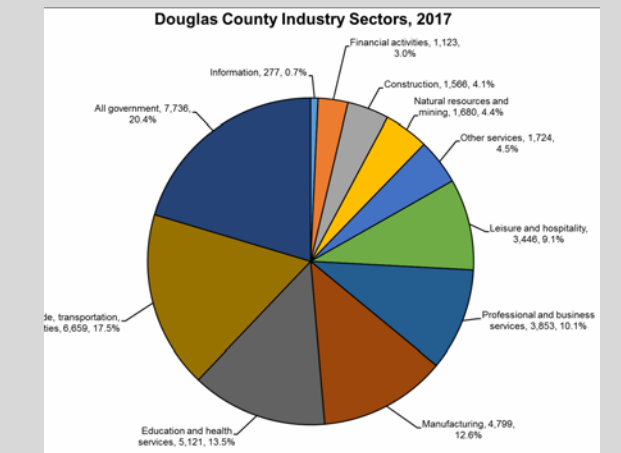
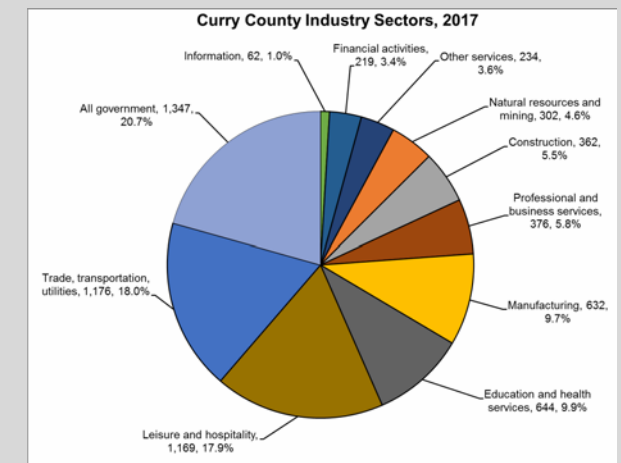
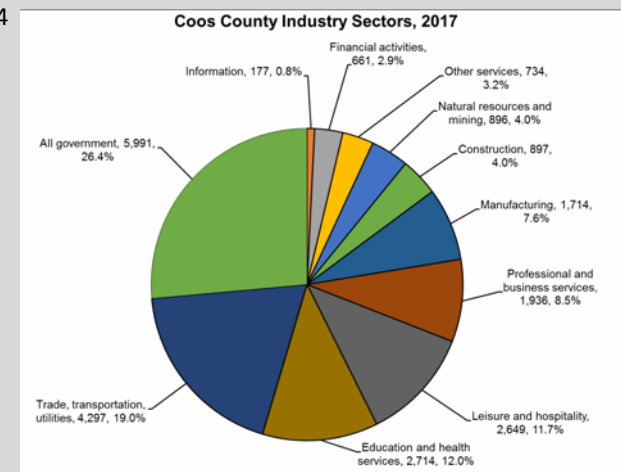
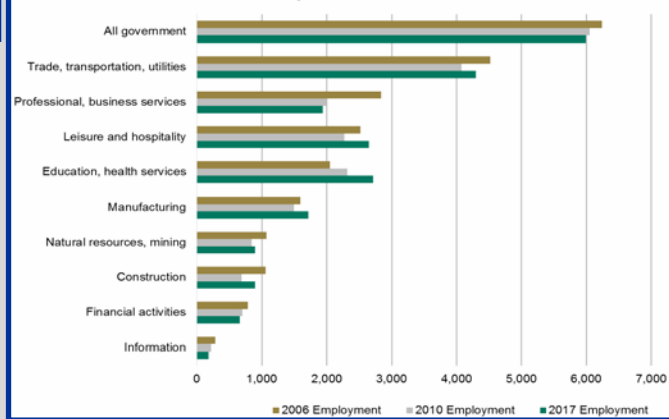


Figure I.3

Figure I.4



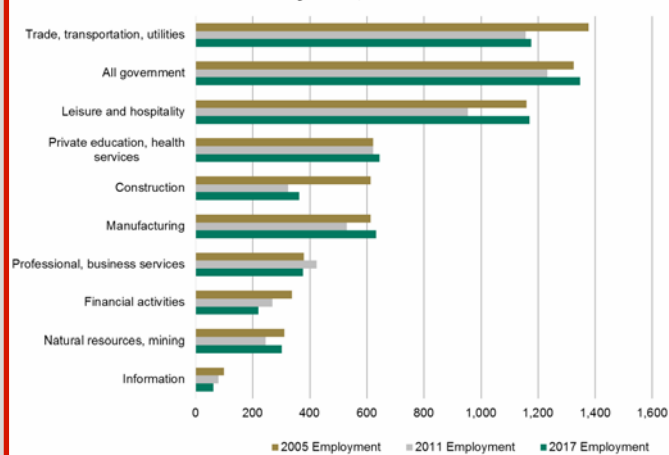
Coos County Employment by Industry: Pre-Recession Peaks, Recessionary Lows, Current Levels



Coos County

	Major Private Sector Industries at Peak Pre-Recession	Major Private Sector Industries at Recessionary Low	Major Private Sector Industries Now	Actual Jobs	Percent Change	During Recovery	Percent Change during Recovery	Actual Jobs	Percent Change Peak to Now
	2006 Employment	2010 Employment	2017 Employment	2006-2010	2006-2010	2010-2017	2010-2017	2006-2017	2006-2017
Trade, transportation, utilities	4,518	4,073	4,297	-445	-9.8%	224	5.5%	-221	-4.9%
Professional, business services	2,834	2,004	1,936	-830	-29.3%	-68	-3.4%	-898	-31.7%
Leisure and hospitality	2,516	2,268	2,649	-248	-9.9%	381	16.8%	133	5.3%
Manufacturing	1,594	1,495	1,714	-99	-6.2%	219	14.6%	120	7.5%
Construction	1,060	689	897	-371	-35.0%	208	30.2%	-163	-15.4%
Public+Private Health care, social assistance (2ndQ2017)	3,306	3,806	4,157	500	15.1%	351	9.2%	851	25.7%
Total payroll employment	23,666	21,300	22,670	-2,366	-10.0%	1,370	6.4%	-996	-4.2%
Total business units	1,975	1,903	1,959	-72	-3.6%	56	2.9%	-16	-0.8%
TOTAL PAYROLL (2017 Values)	\$808,608,166	\$748,456,858	\$862,235,651		-7.4%				6.6%

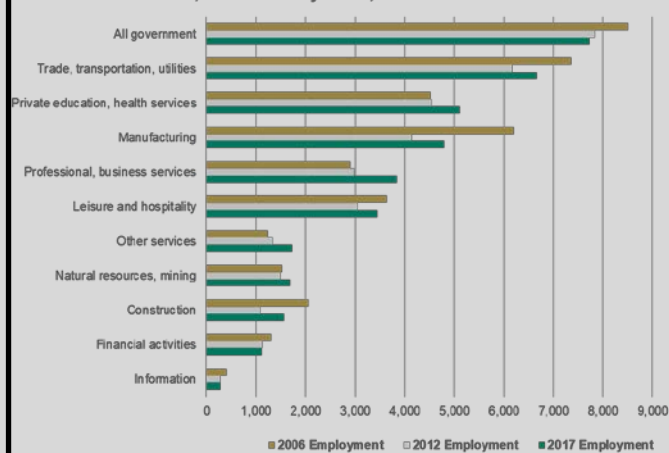
Curry County Employment by Industry: Pre-Recession Peaks, Recessionary Lows, Current Levels



Curry County

	Major Private Sector Industries at Peak Pre-Recession	Major Private Sector Industries at Recessionary Low	Major Private Sector Industries Now	Actual Jobs	Percent Change	During Recovery	Percent Change during Recovery	Actual Jobs	Percent Change Peak to Now
	2005 Employment	2011 Employment	2017 Employment	2005-2011	2005-2011	2011-2017	2011-2017	2005-2017	2005-2017
Trade, transportation, utilities	1,377	1,157	1,176	-220	-16.0%	19	1.6%	-201	-14.6%
Leisure and hospitality	1,159	953	1,169	-206	-17.8%	216	22.7%	10	0.9%
Construction	613	324	362	-289	-47.1%	38	11.7%	-251	-40.9%
Manufacturing	612	529	632	-83	-13.6%	103	19.5%	20	3.3%
Professional, business services	379	423	376	44	11.6%	-47	-11.1%	-3	-0.8%
Public+Private Health care, social assistance (2ndQ2017)	750	848	1,002	98	13.1%	154	18.2%	252	33.6%
Total payroll employment	7,044	6,039	6,530	-1,005	-14.3%	491	8.1%	-514	-7.3%
Total business units	854	802	832	-52	-6.1%	30	3.7%	-22	-2.6%
TOTAL PAYROLL (2017 Values)	\$229,485,660	\$202,583,995	\$227,076,309		-11.7%				-1.0%

Douglas County Employment by Industry: Pre-Recession Peaks, Recessionary Lows, Current Levels

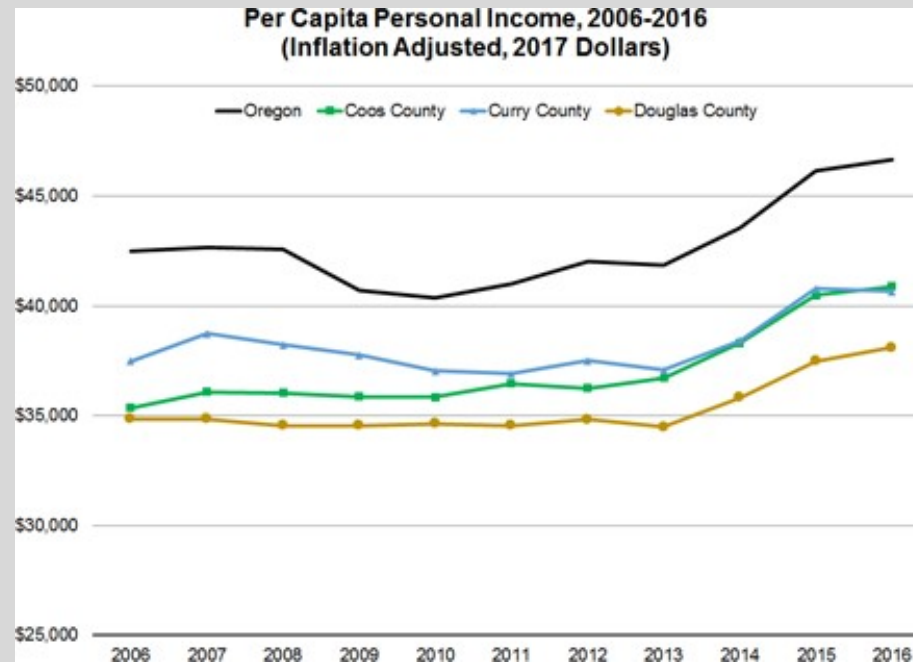


Douglas County

	Major Private Sector Industries at Peak Pre-Recession	Major Private Sector Industries at Recessionary Low	Major Private Sector Industries Now	Actual Jobs	Percent Change	During Recovery	Percent Change during Recovery	Actual Jobs	Percent Change Peak to Now
	2006 Employment	2012 Employment	2017 Employment	2006-2012	2006-2012	2012-2017	2012-2017	2006-2017	2006-2017
Trade, transportation, utilities	7,358	6,168	6,659	-1,190	-16.2%	491	8.0%	-699	-9.5%
Manufacturing	6,194	4,137	4,799	-2,057	-33.2%	662	16.0%	-1,395	-22.5%
Leisure and hospitality	3,630	3,065	3,446	-565	-15.6%	381	12.4%	-184	-5.1%
Professional, business services	2,896	2,984	3,853	88	3.0%	869	29.1%	957	33.0%
Construction	2,056	1,079	1,566	-977	-47.5%	487	45.1%	-490	-23.8%
Public+Private Health care, social assistance (2ndQ2017)	5,192	5,327	6,085	135	2.6%	758	14.2%	893	17.2%
Total payroll employment	39,657	34,064	37,992	-5,593	-14.1%	3,928	11.5%	-1,665	-4.2%
Total business units	3,152	2,855	3,152	-297	-9.4%	297	10.4%	0	0.0%
TOTAL PAYROLL (2017 Values)	\$1,515,005,774	\$1,442,254,729	\$1,511,748,552		-4.8%				-0.2%

Appendix K.

Figure K.1.



Source: Oregon Employment Department

Figure K.2

Subject	Oregon				Coos County, Oregon				Curry County, Oregon				Douglas County, Oregon			
	Total		Mean income (dollars)		Total		Mean income (dollars)		Total		Mean income (dollars)		Total		Mean income (dollars)	
	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error
All households	1,545,745	+/-4,059	72,013	+/-379	25,755	+/-565	55,109	+/-2,929	10,396	+/-373	51,573	+/-2,924	43,937	+/-560	55,965	+/-2,136
With earnings	75.5%	+/-0.2	71,949	+/-460	63.7%	+/-1.8	55,634	+/-4,495	55.6%	+/-3.0	52,328	+/-3,699	64.7%	+/-1.2	54,065	+/-2,885
With interest, dividends, or net rental income	24.6%	+/-0.2	17,880	+/-592	24.0%	+/-1.8	11,964	+/-2,674	28.9%	+/-2.8	11,743	+/-3,200	18.8%	+/-1.2	15,671	+/-4,110
With Social Security income	32.8%	+/-0.2	18,526	+/-88	48.0%	+/-1.6	17,467	+/-520	54.7%	+/-2.4	17,794	+/-883	47.5%	+/-1.2	18,094	+/-431
With Supplemental Security Income (SSI)	4.7%	+/-0.1	9,658	+/-133	6.3%	+/-1.0	10,155	+/-1,291	6.0%	+/-1.6	8,735	+/-1,879	6.1%	+/-0.8	9,378	+/-799
With cash public assistance income	4.0%	+/-0.1	3,285	+/-94	5.8%	+/-0.9	2,957	+/-524	3.7%	+/-1.3	3,380	+/-820	3.8%	+/-0.6	3,474	+/-512
With retirement income	19.6%	+/-0.2	25,457	+/-382	28.1%	+/-1.8	20,185	+/-2,177	26.4%	+/-3.1	24,353	+/-2,707	27.6%	+/-1.3	22,423	+/-2,130

Source U.S. Census Bureau 2012-2016 American Community Survey 5-Year Estimates

Appendix L.

Figure L.1

Ratio of Earnings Percentile Wage to 50th Percentile Wage Oregon, 1990-2017 Four-Quarter Employees, Inflation Adjusted (2017 dollars)				
Year	Worker Earnings Percentile			
	20 th	50 th	90 th	99 th
1990	0.49	1.00	2.16	5.05
1995	0.49	1.00	2.26	5.65
2000	0.51	1.00	2.31	6.22
2005	0.51	1.00	2.39	6.33
2010	0.50	1.00	2.50	6.62
2017	0.52	1.00	2.56	6.87

Figure L.2.

