

Mid-Willamette Valley Council of Governments

DRAFT 2023-2028 Comprehensive Economic Development Strategy



Acknowledgments

The Institute for Policy Research and Engagement wishes to acknowledge the following individuals for their contributions to this project:

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The University of Oregon Economic Development Administration University Center (EDAUC) is a partnership between the Institute for Policy Research and Engagement, the UO Department of Economics, the Oregon Small Business Development Center Network, and the UO faculty. The UO EDAUC provides technical assistance to organizations throughout Oregon, with a focus on rural economic development.

This project was funded in part by the U.S. Economic Development Administration through the University Center grant program.



About the Institute for Policy Research and Engagement

**School of Planning, Public
Policy and Management
Institute for Policy
Research and Engagement**

The Institute for Policy Research & Engagement (IPRE) is a research center affiliated with the School of Planning, Public Policy, and Management at the University of Oregon. It is an interdisciplinary organization that assists Oregon communities by providing planning and technical assistance to help solve local issues and improve the quality of life for Oregon residents. The role of IPRE is to link the skills, expertise, and innovation of higher education with the transportation, economic development, and environmental needs of

communities and regions in the State of Oregon, thereby providing service to Oregon and learning opportunities to the students involved.



Special Thanks

The Institute for Policy Research and Engagement thanks the following individuals for their assistance with this project:

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Special Thanks

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Special Thanks

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The Mid-Willamette Valley
Economic Development District
is designated by the U.S.
Department of Commerce
Economic Development
Administration (EDA) to work
on economic development
efforts in Marion, Polk, and
Yamhill Counties.



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Executive Summary

The purpose of the Comprehensive Economic Development Strategy (CEDS) is to improve regional economic conditions through job growth, fostering stable and diversified economies and improving community livability. It provides a mechanism for coordinating the efforts of multiple individuals, organizations, governmental entities, and private industry efforts that promote economic development and resiliency within the region.

The CEDS is organized into 6 main sections:

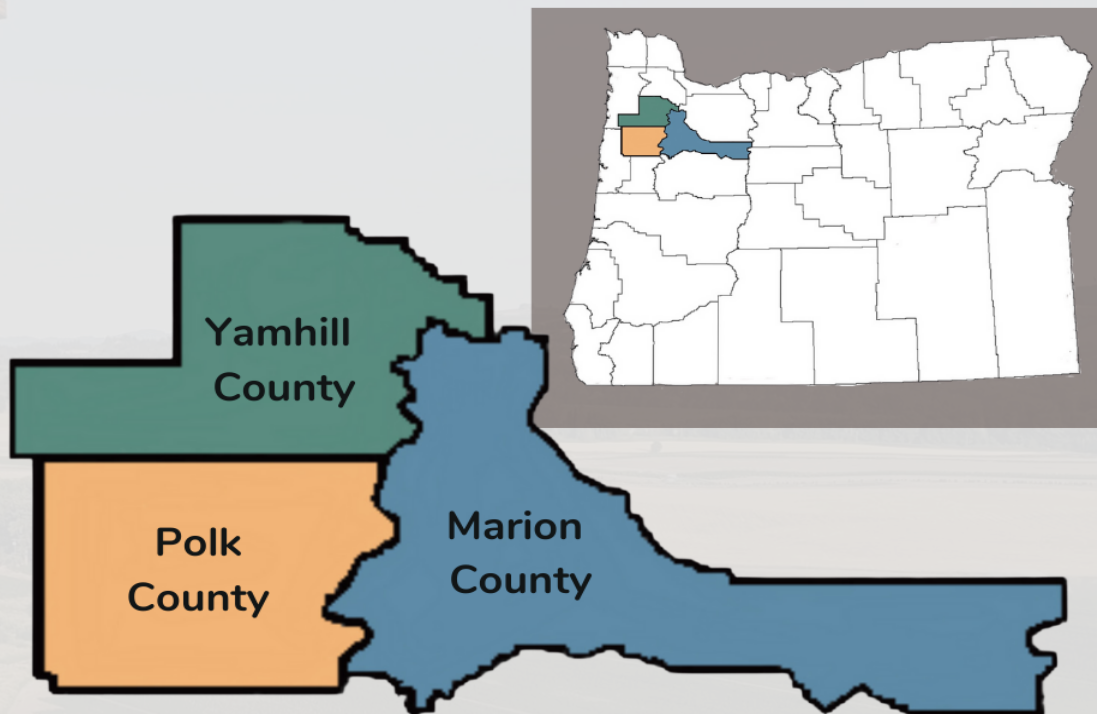
- Regional Context or the economic conditions of the region
- SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats)
- CEDS Goals and Objectives determined by community engagement
- Action Plan for implementation of regional goals and objectives
- Evaluation Metrics to measure progress over time
- Appendices: includes regional resiliency metrics and project details

Key takeaways from the 2023 CEDS :

- The Mid-Willamette Valley (MWV) continues to recover from the 2008 economic recession, COVID-19 pandemic, and recent wildfires.
- The Mid-Willamette Valley enjoys a competitive advantage in the following private industries: Health Care, Manufacturing, Construction, and Agriculture
- Economic challenges in the Mid-Willamette Valley include changing demographics, workforce housing scarcity, desire for increased living wages, and childcare availability.
- Regional goals were established that support a set of objectives and actions designed to leverage local businesses, target workforce needs, create resilient infrastructure, and increase regional collaboration.

Where is the Mid-Willamette Valley?

Mid-Willamette Valley Council of Governments Region



The **Mid-Willamette Valley** region is located in the Northwestern part of Oregon and close to the middle of the Willamette River Basin. **Marion, Polk, and Yamhill counties** are located in the Mid-Willamette Valley, which represents about a quarter of the entire land area of the Willamette Valley. The Mid-Willamette Valley also hosts **Salem, the state's capital and the region's largest city.**

Resiliency Metrics



Does the economy have diverse and well-paid jobs?



What is the projected future of major employment sectors in the region and nationally?



What is the age breakdown of the residents?



Do people work and live in the community?



How has the population shifted in the last decade and what is predicted for the next 30 years?



Is the built infrastructure able to withstand natural hazards or weather incidents?



What level of education attainment and earnings are residents reaching?

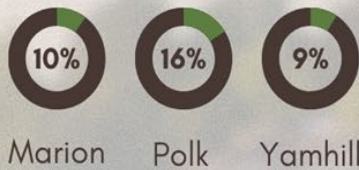


Do residents have access to health and wellness facilities?

Regional County Resiliency Factors

Projected Population Growth

Population growth in the 3 counties **between 2010 - 2020:**



The population of the Mid-Willamette Valley is **expected to grow** in the next few decades as a result of **in-migration** from other states and Oregon counties.

Infrastructure Resiliency

- The predicted natural hazards for the region in the coming years are **wildfires, flooding, and earthquakes**.
- Rapid population growth requires cities in the region to **re-invest and update aging water and sewer systems**.
- All three counties and several cities in the region have developed **mitigation plans to minimize damage** caused by natural hazards.

Educational Attainment

Percentage of residents with a **bachelor's degree or higher:**



As a comparison, the percentage of residents with a bachelor's degree or higher **statewide** is:



Access to Healthcare

- Approximately **7%** of Oregon's residents **do not have health insurance**.
- The percentage of people **without insurance** in the 3 counties:



Regional Context based on Resiliency Metrics

Diverse and Well-Paid Jobs

- **Agriculture is a significant industry** in the region, with **an average wage of \$43,000** annually.
- Construction, Health Care, and Manufacturing employment is high in the region.
- **Professional business services** have a lower employment concentration in Yamhill and Polk Counties than Marion County and the State.
- All three counties have fewer workers employed in **Information, Wholesale trade, and Professional and business services** (high wage jobs) compared to the State.

Future of Major Industries

- The **Mid-Willamette Valley** region is **the most productive agricultural region** in the state.
- **Polk County** has a specialization in **Health Care**.
- **Yamhill County** has a specialization in **Manufacturing** (by private covered employment).
- The region has a number of **small farm operations, and high crop diversity**. There are over **200 crops** in **Marion County** alone.

Age of Residents

The **median age** in Mid-Willamette Valley is **between 37-39** years old.



of the population in the region is made up by **workers over 55** years old.

Commuting and Living Patterns



of employees in the region **live outside** of the county they work in.



of all residents in Mid-Willamette Valley are ***cost-burdened**.



as little as **3%** of Mid-Willamette Valley residents **use public transit** to commute.

*cost burdened: spending 30% or more of their income on housing.

SWOT Analysis

Strengths

- Diverse Industry Base and Workforce
- Quality of Life
- Supportive Business Environment
- Interstate Access
- Natural Resources



Weaknesses

- Affordable, Available Childcare & Housing
- Collaborative Regional Workforce Training
- Poor Rural Connectivity & Infrastructure
- Capacity Barriers to Capital
- Perceived Lack of Regional Project Collaboration



Opportunities

- Community Economic Resilience
- Public/Private Collaboration Models
- Increased Business Support
- Strengthen Regional Connections to Existing Resources



Threats

- Demographic Shifts
- Infrastructure Connectivity
- Workforce Shortage
- Natural Hazard Risk
- Business Development Challenges



Goal 1: Business

Streamline capital flow to businesses that promote innovation, economic resilience, and sustainability.

OBJECTIVE 1

Support small business growth

- Mitigate barriers to accessing capital
- Redevelop & reuse city sites to stimulate urban renewal
- Improve access to public & private funding, grants, and loans
- Advocate for transparent grant/loan opportunities and increased capacity for grant writing



OBJECTIVE 2

Prioritize support for business and innovation in regionally significant sectors.

- Incentivize new business formation, incubators, and investments
- Connect businesses with existing grant/loan programs
- Encourage collaborative community projects & public/private partnerships
- Support innovation resources for businesses and entrepreneurs
- Work with employers, community leaders, and developers for workforce housing at a variety of salary levels



OBJECTIVE 3

Target regionally significant industries for capital and innovation investments.

- | | |
|-------------------------------|---------------------------------------|
| Agriculture/Natural Resources | Renewable Energy and Green Technology |
| Manufacturing | Food & Beverage |
| Construction | Tourism (including Agritourism) |



OBJECTIVE 4

Invest in business development that promotes resilience, inclusion, sustainability, and technology.

- Stimulate business investments that promote economic resilience
- Incentivize inclusive business development
- Encourage business energy efficiency and environmental sustainability
- Develop resources to provide sustainable assistance to entrepreneurs from underrepresented communities
- Integrate technological improvements into existing industries



Goal 2: Workforce

Increase awareness of regional workforce training opportunities and facilitate quality community level support for regional prosperity.

OBJECTIVE 1

Facilitate educational opportunities for youth and current workforce in regionally significant sectors with future needs.



Market jobs to K-12 families through field trips and education materials

Increase awareness of trades and higher ed to non-traditional students

Fund & increase availability of training and apprenticeships for non-traditional students

Fund training, marketing, and job transition for minority populations

OBJECTIVE 2

Promote living wage & holistic family support of regional workforce.



Promote employer-supported health care and increased health services

Increase awareness of debt relief & financial literacy programs

Address workforce housing and explore Universal Basic Income pilots

Regularly measure benefits cliff in vulnerable populations

OBJECTIVE 3

Address childcare needs and improve access to quality care.



Seek publicly-funded childcare spots

Incentivize all types of care workers benefits & wages

Create spatial data records for childcare and document barriers

Promote mixed-use buildings with childcare in urban renewal policies

OBJECTIVE 4

Improve community, home, and workplace resources to support workforce quality of life.



Support community parks plans and updates

Promote community cultural identity with festivals & events

Continue investment in social services for populations under 10,000

Shop local business events & local business representation in community

Goal 3: Community Infrastructure

Create and enhance community infrastructure that promotes resilient growth and reduces disparity while driving economic development.

OBJECTIVE 1

Align all new and existing community infrastructure with Oregon's Natural Hazards Mitigation Planning (NHMP) Resilience Plan (9.2.3).



Water/wastewater	Housing
Transportation	Industrial Lands
Energy	Resilience
Broadband	

OBJECTIVE 2

Enhance access to critical services to rural areas in the region.



- Further deployment of broadband infrastructure
- Evaluate transit connectivity

OBJECTIVE 3

Adopt a shared implementation framework that identifies regional infrastructure demand.



- Gather infrastructure & affordable housing experts
- Consolidate current infrastructure-needs lists
- Determine affordable implementation of Oregon's NHMP Resilience Plan across projects
- Facilitate federal grant matching funds opportunities
- Facilitate biannual grant trainings to create or update background
- Form a committee to ensure regional interconnection of infrastructure
- Evaluate shared methods of grant and loan procurement
- Regularly update Regional Resilience Metrics

Goal 4: Regional Collaboration

Strengthen regional collaboration through coordinated action, efficient funding distribution, and standardized growth measurement to achieve regional prosperity.

OBJECTIVE 1

Implement strategies that promote equity in both public and private agencies.



- Encourage partnership and collaboration on project delivery

- Leverage community based organizations to lead meaningful engagement

- Develop and maintain progress-tracking regional metrics

OBJECTIVE 2

Facilitate information and resource sharing to advocate for community projects and policies.



- Trial a shared data platform

- Advocate for funds at the regional level

- Leverage joint applications for state funding

OBJECTIVE 3

Develop, identify, and improve existing collaborative efforts.



- Strengthen targeted private and public partnerships

- Reinforce connections between rural and urban areas

- Allocate resources to coordination efforts beyond three counties

- Look for opportunities to hire diverse staff

- Increase capacity for coordination between three counties

- Reduce barriers to creative housing solutions

- Regional Holistic Needs Assessment

- Implement a Circuit Rider approach to technical assistance

Introduction



The Mid-Willamette Valley (MWV) Economic Development District (EDD) and Council of Governments (COG) lead economic development initiatives in Marion, Polk, and Yamhill Counties. The MWV EDD and COG play a critical role in identifying and addressing community and economic development matters at the regional level, as well as outlining the vision, goals, and work programs to maximize opportunities in the area.

The region develops a comprehensive economic development strategy (CEDS) every five years. According to the Economic Development Administration's definition, the CEDS serves as a tool for fostering collaboration between the public and private sectors; assessing, enhancing, and diversifying regional economies; establishing goals and objectives; formulating a regional action plan; and identifying funding sources and investment priorities. The most recent update of the CEDS in the MWV took place in 2018. The 2023 iteration places significant importance on exploring innovative methods for community engagement while placing a strong focus on economic resilience, climate resilience, workforce development, and equity. The aim is to ensure that the issues and strategies outlined in the CEDS are rooted in principles of fairness, equality, and the ability to withstand and recover from various economic challenges.

Note: The expanding inability of local governments to provide services due to constrained income by ballot measure 5/50, with property tax growth limited to 3% and inflation running at significantly higher rates, local governments have exhausted work arounds, situational funding (ARPA).

This is a significant challenge across the region. In looking at community infrastructure, water, sewer, transportation it's important to acknowledge the lack of infrastructure limits economic success and the limitations on local governments to be able to meet these infrastructure needs.



The MWV EDD and COG, in collaboration with the University of Oregon Institute for Policy Research and Engagement (IPRE), are striving to gain insight into the potential impacts a project may have on vulnerable and marginalized populations and effectively address community needs. The 2023 update took approximately fourteen months and consisted of various research methods, including online surveys, interviews, and workshops with participants from local governments, regional partners, state and federal partners, businesses, and community partners. Based on our findings, we emphasize three major conditions – particularly affecting marginalized populations – that need to be addressed at the regional level:

Representation: In Marion County, one-fifth of the population identifies as races other than white, and over one-quarter of the population identifies as Hispanic or Latino; Polk and Yamhill Counties have smaller proportions of non-white and Hispanic/Latino residents with less than one-fifth of the population identifying as races other than white or Hispanic/Latino.

Poverty: in all three counties, just over *one in ten* residents live in poverty.

Housing Affordability: in all three counties, just under one-third of homeowners and almost one-half of renters are “cost-burdened” (spending more than 30% of their income on housing).

In This Document

Regional Context – Describes key demographic and economic factors that characterize the Mid-Valley region and impact the area’s economic resilience.

SWOT Analysis – Highlights core strengths, weaknesses, opportunities, and threats present in the region.

Goals and Objectives – Introduces the four goals guiding this CEDS.

Short Term Action Items – Lists action items under each goal and objective that partners determined to be important and/or achievable in the short term.

Evaluation Framework – Outlines the indicators the District can track to mark progress over time for each goal.

Appendix A: Regional Context – Provides additional background data to characterize the region.

Appendix B: Full SWOT Analysis – Lists in detail factors highlighted by regional partners during the CEDS development.

Appendix C: Economic Resilience – Provides the results of a 2022 economic resilience assessment that identifies stronger and weaker “signals” of resilience in the region that the District can track over time.

Appendix D: Definitions – During the course of this project, several terms were frequently used by partners, but there was not always a shared understanding of the meaning of these terms. This appendix provides definitions to increase shared understanding.

Appendix E: Regional Priority Projects – The Mid-Willamette Valley COG maintains an active list of priority projects for the region, available upon request.

Appendix F: Full Action Plan – Provides a full list of actions, both short and long term.

Regional Context

Overview

The Mid-Willamette Valley (MWV) is located in the northwestern section of Oregon's Willamette Valley, near the middle of the Willamette River Basin. Marion, Polk, and Yamhill counties make up the MWV, which represents about a quarter of the entire land area of the Willamette Valley. The MWV includes Salem, the state capital and the region's largest city. While the landscape offers strengths such as a diverse range of industries, a favorable quality of life, and strong connectivity, it also faces challenges such as inadequate childcare supply, a growing population, and a need for more affordable workforce housing. This section provides an overview of the region, with full data and additional details in [Appendix A](#).

Note on Data

The information provided in this chapter was largely gathered from the American Community Survey. The (ACS) is an ongoing survey that provides year-over-year data on community demographical information. The 5-year estimates from the ACS are "period" estimates that represent data collected over a given period. The primary advantage of using multi-year estimates is the increased statistical reliability of the data for less populated areas and small population subgroups. Please note that in 2020, the ACS faced numerous data collection challenges as a result of the COVID-19 pandemic. [As a result of those challenges, the ACS collected only two-thirds of the responses it usually collects in a survey year.](#) The ACS survey data included in this report may therefore have a larger margin of error and a lower degree of statistical accuracy than would be preferred.





For this report, the University of Oregon's Institute for Policy Research and Engagement (IPRE) composed eight holistic questions to measure resiliency, covering various economic-related topics such as diversified economies, employment sectors, demographic makeup (age and education), commuting patterns, population growth, infrastructure, and access to healthcare ([Appendix C](#)). Together, these factors help to describe the current economic conditions found in the Mid-Willamette Valley. Data used to compile the resiliency metrics come from the American Community Survey (ACS) and the Oregon Employment Department, as well as the Comprehensive Economic Development Strategy (CEDS) guidance from the Economic Development Administration (EDA). This regional context section also includes an analysis of the region's strengths, weaknesses, opportunities, and

threats (SWOT) to help form a comprehensive economic development strategy.

According to the Economic Development Administration, resilience refers to the capacity to anticipate, endure, and recover from various forms of challenges that may arise at any time.¹ These challenges may arise from natural disasters (floods, fire, earthquakes, etc.) and economic disruptions (major industries decline, population changes, etc.). The speed at which a community can recover from disruption and its preparedness to withstand or avoid potential economic threats is determined by its economic resilience. Through the evaluation of several factors contributing to economic resilience, we can gain a better understanding of how to effectively allocate resources to foster resilience in our communities.

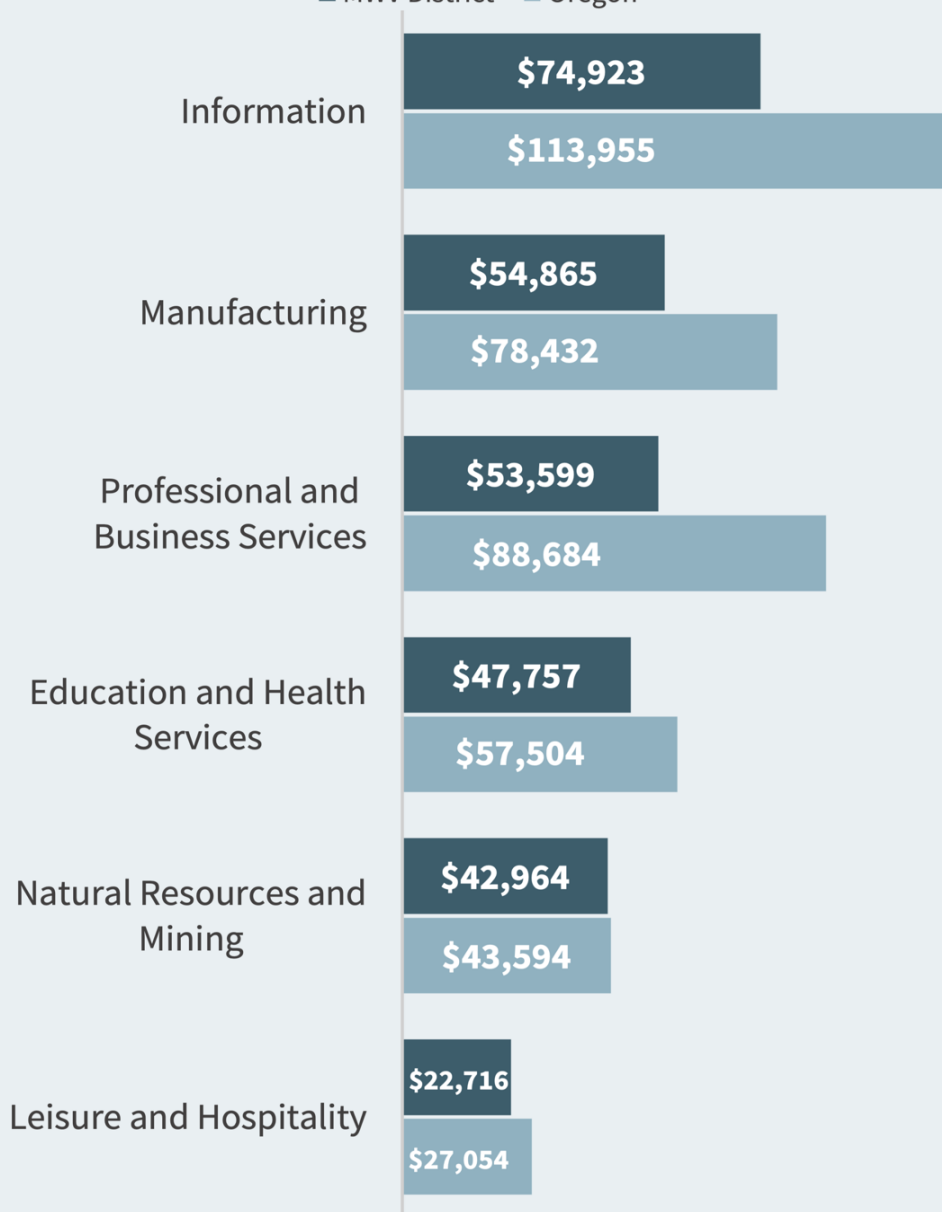


¹ "Economic Resilience." *U.S. Economic Development Administration*, www.eda.gov/resources/comprehensive-economic-development-strategy/content/economic-resilience?q=/grant-resources/comprehensive-economic-development-strategy/content/economic-resilience#climate-resilience.



FIGURE 2: ANNUAL AVERAGE WAGES BY INDUSTRY (2021)

■ MWV District ■ Oregon



Private industry jobs pay less in the Mid-Willamette Valley than Oregon overall

- ✓ Information Technology is the highest wage industry in the region at approximately \$74,923 annually but is considerably less than the statewide average of \$113,955.
- ✓ Agriculture jobs are prevalent in the region and provide an average wage of \$42,964 per year, closely following the statewide average but provides a much lower wage than other industries in the region.
- ✓ Leisure and hospitality jobs paid the least in the MWV and statewide at \$22,700 per year and \$27,054 respectively.

Source: Oregon Employment Department, 2021 Average Annual Wage Estimates by 2 digit NAICS, private industry only

Poverty: Affects Communities of Color Most Often

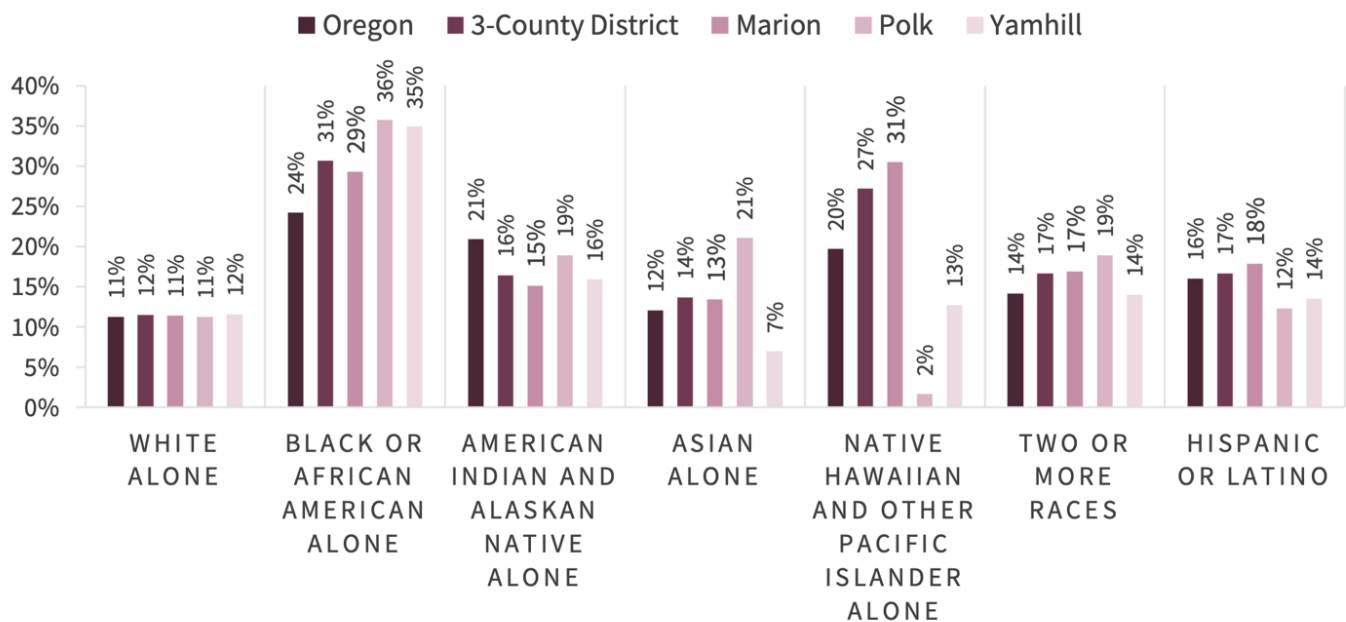
From 2016 to 2021, the share of families in poverty in Yamhill decreased slightly, in Polk by 1.8 percentage points, and in Marion by 3.3 percentage points (see [Appendix A](#)).

Despite decreases in overall poverty in the MWV, populations of color are disproportionately affected by poverty and face higher poverty rates than the region's White population. Black or African Americans are between 29% and 35% of the population in poverty in all three counties, a figure that has

grown on average by 4% in the three-county region, while those identifying as White are just over 11% in poverty (in all three counties). The share of Hispanic or Latino residents with an income below the poverty line declined by nearly 10 percentage points between 2016 and 2021, but between 12-18% remain in poverty.

Please see [Appendix A](#) for a more detailed breakdown of poverty rate statistics in the Mid-Willamette Valley.

FIGURE 3: PERCENT OF RESIDENTS WITH INCOME BELOW POVERTY LINE (2021)

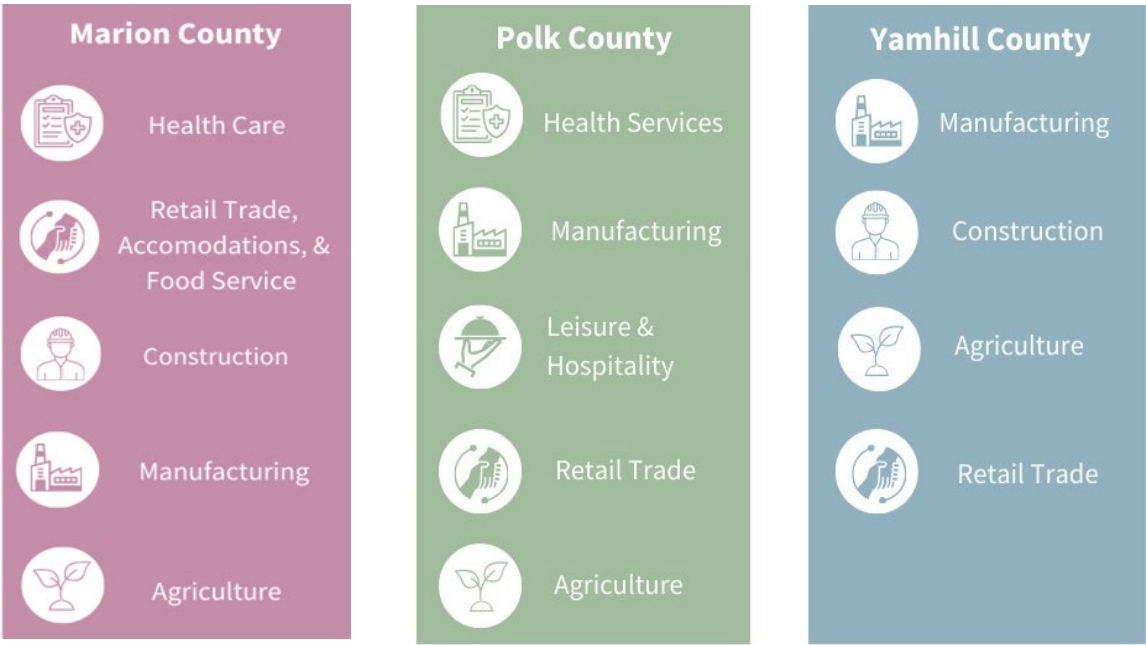


Source: Social Explorer ACS 5-Year Estimates (2016-2021) Tables SE: A13001A through SE: A1300H



Industry: Health Care, Manufacturing, Construction, Retail, and Agriculture are strong in Mid-Willamette Valley in 2021

FIGURE 4: LARGEST INDUSTRIES BY REGIONAL EMPLOYMENT



Source: Oregon Employment Department, Quarterly Census of Employment and Wages by 2 digit NAICS, largest by private employment

Despite population differences, Marion, Polk, and Yamhill Counties have similar private industry employment concentrations, along with a strong public sector. Health Care, Construction, Manufacturing, Retail Trade, Leisure and Hospitality, and Agriculture (mainly crop production) are some of the largest industries by private covered employment throughout the Mid-Willamette Valley in 2021.

Many of the large employment industries in the region relate to food growth and production, sales, and consumption. In Marion County alone there are over 200 crops including blackberries, raspberries, hazelnuts, hops, grass seed, and Christmas trees. In the three-county region, 109 food manufacturing business units



are recorded in the private covered employment numbers in 2021 by the Oregon Employment Department.

Marion County employs the most private industry workers in Health Care. Retail Trade is the second largest private industry by employment, then Construction, Manufacturing, and Agriculture respectively, with a majority of Agriculture employment in crop production. Food production, wood products, and fabricated metal manufacturing are the largest sectors in

Manufacturing by employment. Notably, state and local governments are the largest employers in Marion County.

Polk County's largest industries in 2021 (by private covered employment) are Health Care and Social Assistance, Leisure and Hospitality -largely food and drinking establishments, Manufacturing of beverage products and fabricated metal, Retail Trade (food and beverage sales), and Agriculture. Similar to Marion County, the government is the largest employer overall, with local and tribal government employing a higher percentage of the workforce than other private and public industries.

Yamhill's largest private industry by employment in 2021 was Manufacturing (food, beverage, and wood products) which mimics the manufacturing concentrations in other parts of the region. The next largest are Health Care, Retail Trade (food and beverage), and Agriculture (crop production) respectively. Government employment is slightly less prominent in Yamhill County, but it is the second largest employment sector after Health Care.





Age of Residents: Area Workforce Is Young and Needs More Childcare Options

The median ages of residents in Marion, Polk, and Yamhill Counties are 37, 37, and 38.6 years old respectively, slightly younger than the state median age of 39.5 years old ([Appendix C](#)). Of the working population, 15% are pregnant or parenting children under 18, yet all three counties are childcare deserts (three or more kids waiting for every childcare spot) for children under five. According to the [2022 Oregon's Child Care Deserts Report](#) ("Oregon's Child Care Deserts 2022: Mapping Supply by Age Group and Percentage of Publicly Funded Spots"), every county in Oregon is experiencing an inadequate supply of regulated childcare, especially in infant and toddler care.

Commuting Patterns: Commuters Rely Heavily on Automobiles

Marion, Polk, and Yamhill Counties have large numbers of employees living outside of the counties they work in. Polk and Yamhill Counties have 57% and 55% of total employees, respectively, living outside the counties, while Marion County is slightly lower with 46% ([Appendix C](#)).

Commuters rely heavily on automobiles, with 87% (Marion), 86% (Polk), and 84% (Yamhill) of residents using cars, trucks, or vans to commute. Less than 8% of commuters in all three counties use other modes of transport—such as walking, biking, or public transit—to commute ([Appendix C](#)).



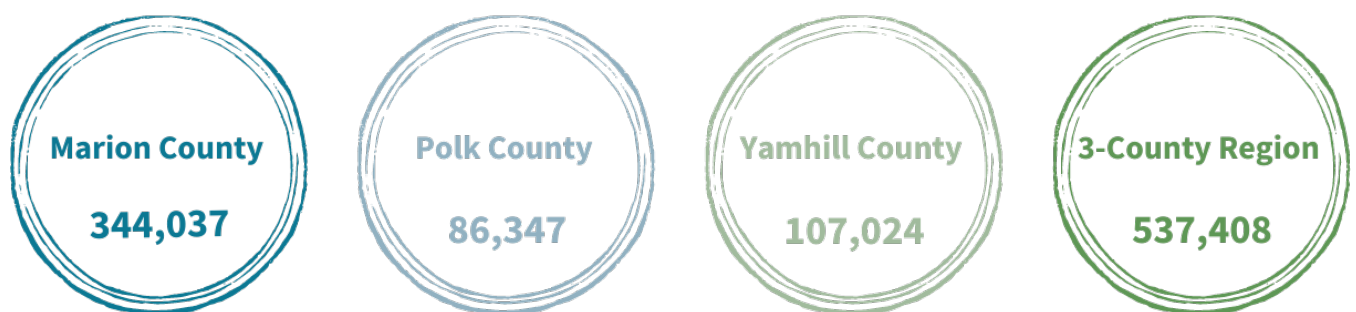
Housing: Costs Are High in the MWV

Housing costs in all three counties remain relatively high: 48% of renters and 34% of all residents in Marion County are cost-burdened (paying 30% or more of their income on housing). In Polk County, 45% of renters and 36% of all residents are cost-burdened. Yamhill County has the highest percentage of cost-burdened residents, with 47% of renters and 40% of all residents cost-burdened ([Appendix C](#)).

Population Shifts: Increase Due to In-Migration

From 2010-2020, Marion, Polk, and Yamhill Counties experienced a population increase of 9.7%, 16%, and 8.6%, respectively ([Appendix A](#)). Over the next few decades, the Mid-Willamette Valley is expected to continue growth due to in-migration from other states and Oregon counties, with Marion County experiencing the most growth. Forecasted growth in the region is expected to primarily concentrate inside the urban growth boundaries (UGBs).

FIGURE 5: TOTAL POPULATION (2021)



Source: Social Explorer ACS 5-Year Estimates (2017-2021), Table SE: A0001.

Infrastructure Resiliency: Hazard Risk Relatively High for Marion & Moderate for Polk and Yamhill



Marion County

- Homes without complete plumbing (0.4%), kitchens (2.4%), telephone service (1.1%)
- Broadband access is provided by 14 corporations allowing for >80% to be served
- Hazard risk is “**relatively high**” based on the county’s FEMA National Risk Index (2022), which has a score of 96.75

Polk County

- Homes without complete plumbing (0.8%), kitchens (2.4%), telephone service (1.3%)
- Broadband access is provided by 17 corporations allowing for >80% to be served
- Hazard risk is “**relatively moderate**” based on the county’s FEMA National Risk Index (2022), which has a score of 86

Yamhill County

- Homes without complete plumbing (1.3%), kitchens (3.2%), telephone service (1.0%)
- Broadband access is provided by 12 corporations allowing for >80% to be served
- Hazard risk is “**relatively moderate**” based on the county’s FEMA National Risk Index (2022), which has a score of 89.82

Please see [Appendix C](#) for more details regarding resiliency metrics within the region.

Educational Attainment: Higher Percentage of Population Without High School Diploma Compared to the State in Marion and Yamhill

While all three counties have high numbers of residents with high school degrees or GEDs (Polk County with 92%, Yamhill County with 90%, and Marion County with 86%), Marion County has the highest percentage of residents with less than high school education (14%) in the Mid-Willamette Valley. Polk and Yamhill come in at 8% and 10%, respectively, while the statewide average is about 9%. Oregon's high school or GED attainment is 92% ([Appendix A](#)).

Bachelor's degree attainment in all three counties varies. Polk County has the highest percentage, with 31% of its residents having a bachelor's degree or higher, followed by Yamhill County with 28% and Marion County with 25%. Oregon's overall bachelor's degree attainment is 35%. There is a correlation between educational attainment and average wages.



Health and Wellness Access: More Uninsured People in Marion County and Frontier Travel Times to Hospital Higher than Statewide Average

The percentage of residents without insurance in Polk and Yamhill counties is 5.6% and 6%, respectively, while Marion County's percentage is just over 8% compared to the state average of 6.6%.

In Oregon, the average travel time to a Patient Centered Primary Care Home (PCPCH) is 13.6 minutes. Travel time is as low as 10 minutes in urban areas, 13 minutes in rural areas, and 19 minutes in frontier areas ([Appendix C](#))



SWOT Analysis

We asked the MWV community to identify opportunities and challenges facing our region. Themes emerged within four categories of analysis: strengths, weaknesses, opportunities, and threats. The results shaped our identification of strategic priorities and actions for this CEDS. A summary of the Mid-Willamette Valley SWOT is detailed below, by element. Refer to [Appendix B](#) for further detail. This section, together with the information contained elsewhere in this report, satisfies 3 C.F.R. § 303.7(b)(ii).

Strengths

Diverse Industry Base

- + Agricultural food production, wine, and manufacturing industries present in the region
- + Growth in key employment sectors
- + Easy access to outdoor recreation
- + Presence of high-wage industries

Supportive Business Environment

- + Workforce training programs, access to higher education opportunities, robust network of business support service providers, MWVCOG

Connectivity

- + Access to Interstate-5
- + >80% regional broadband access
- + Proximity to employment and population centers: Salem and Portland

Public Infrastructure and Natural Resources

- + Water availability; hydroelectric power
- + Clean air and rich agricultural land

Weaknesses

Childcare and Housing Shortages

- Cost-burdened households
- Lack of affordable, available childcare
- High wage-dependency ratio
(dependent/no-income/welfare individuals who cannot work divided by total population)

Workforce Development Collaboration

- Reported competition between workforce training programs
- Low cultural diversity in some industries and high barriers to entry in apprenticeship and training programs

Rural Connectivity and Infrastructure

- Poor regional transportation options for smaller communities
- High rates of single-occupancy, high-emission gas vehicles creating road stress

Regional Economic Development Strategies

- Perceived limited regional collaboration, lack of shared vision
- Low capacity within municipalities
- Lack of public/private collaboration
- Duplication of development efforts
- State regulations make responding to current needs time-intensive



Opportunities

Community Economic Resiliency

- + Address vulnerable population housing needs
- + Reduce ratio of the population without health insurance in Marion County
- + Utilize Increasingly diverse population in the region

Regional Industry Collaboration

- + Potential for integration of agricultural production and processing
- + Increase employment, innovation, and wages in identified industry sectors
- + Public/Private initiatives for community developers

Strengthen Economic Resources

- + Large reserves of natural resources and raw materials
- + Access to Pacific Rim trade markets
- + Access to the Interstate-5 corridor

Threats

Demographic Shifts

- Loss of 20- to 40-year-old age groups due to out-migration
- Ongoing urban-rural divide

Workforce Training and Provider Connectivity

- Lack of regional public transportation and commuting options for residents who live and work in the county
- Funding constraints of public education and the development of new curriculum

Natural Hazard Risk

- High FEMA hazard risk in Marion County
- Low hospital bed capacity per capita
- Risk of Cascadia subduction zone earthquake

Business Development Barriers

- Grant timelines/opportunities create competition
- Lack of available industrial land; lengthy and costly approval process
- Wetland mitigation bank is nearing capacity in some parts of the region
- Lack of institutional capacity to respond quickly to economic development needs

Goals and Objectives

The strategic direction and corresponding action plan contained within the CEDS are the heart and soul of the document. They should answer the questions “Where do we want to go?” and “How are we going to get there?” by leveraging the analysis undertaken in the SWOT. The goals and objectives are based on specific areas of economic development informed by the Mid-Willamette Valley context, strengths, and weaknesses and developed based on themes of challenges and priority projects from advisory group meetings and interviews with regional stakeholders in the winter and spring of 2023. This section aims to capture succinctly the aspirations in the face of realistic challenges of the region.



Vision Statement





The vision statement should answer the question “Where do we want to be in the next five years?” The 2023 Mid-Willamette Valley vision statement is:

The Mid-Willamette Valley is building a dynamic and resilient economy that leverages businesses, workforce, community infrastructure, *and* regional collaboration to enhance equity and prosperity for all residents who call this region home.

Defining Goals and Objectives

Goals and objectives provide the basis for formulating the action plan and serve as milestones to evaluate regional progress. Each goal should have a rationale that is clearly understood and publicly supported. Objectives are more specific, measurable, concrete, and support the attainment of the goals, as directed by the implementation framework.

Summary of Goals

	Goal 1	Business	Streamline capital flow to businesses that promote innovation, economic resilience, and sustainability.
	Goal 2	Workforce	Increase awareness of regional workforce job & training opportunities and facilitate quality community.
	Goal 3	Community Infrastructure	Create/enhance community infrastructure to promote resiliency and reduce disparity while driving economic development.
	Goal 4	Regional Collaboration	Strengthen regional collaboration through coordinated action, efficient funding distribution, and standardized growth measurement to achieve regional prosperity.

Short Term Action Items



The implementation framework for the Mid-Willamette Valley (MWV) Comprehensive Economic Development Strategy (CEDS) outlines the goals, objectives, action strategies, responsible parties, priority level and timeframe for achieving the collective vision of the region. The primary aspirations of the region are displayed in the CEDS' goals, through the development of business, workforce, community infrastructure, and regional collaboration. Each objective supports a specific goal and provides actionable strategies that

encompass a diverse range of approaches to catalyze economic growth. Engaging relevant stakeholders and responsible parties is crucial in applying and leveraging these action strategies for funding sources. Given various competing priorities and limited resources, priority levels help the MWVCOG identify which projects to address first. Providing a clear timeframe for achieving the defined action strategies helps guide direction for the next five years.

Ultimately, the action plan serves as a guide for achieving economic growth and prosperity by aligning the CEDS goals, objectives, action strategies, stakeholders, and timeframe to build an inclusive economy that serves the needs of everyone in the Mid-Willamette Valley. The working group established four main goals to streamline capital flow to businesses, promote workforce training opportunities, promote resiliency while driving economic development, and strengthen regional collaboration. Within the four goals, several objectives were identified based on interviews, community engagement workshops, and the priority projects list from MWVCOG (available upon request).

The Mid-Willamette Valley Council of Governments would like to achieve all goals heard in the engagement session with community members and practitioners in the next five years but recognizes that not all projects may be completed in the timeframe. For that reason, the following section highlights the CEDS goals and objectives that can be reasonably achieved under 5 years (**short term action items**). For the comprehensive list of all identified goals, **short and long term action items**, please see [Appendix F](#).



Goal 1 Business: Streamline capital flow to businesses that promote innovation, economic resilience, and sustainability

Objective 1.1: Support small business growth

Short Term Action Strategies	Who
Mitigate barriers to accessing capital	MWVCOG, Business Oregon, Chemeketa, SBDC, SEDCOR, Economic Development Organizations
Advocate for transparent grant/loan opportunities and increased capacity for grant writing	MWVCOG

Objective 1.2: Prioritize support for business and innovation in regionally significant sectors

Short Term Action Strategies	Who
Incentivize new business formation, incubators, and investments	MWVCOG, Business Oregon, SEDCOR, Economic Development Organizations, OMEP, innovation hubs and incubators, Latino Business Alliance, SBDC
Connect businesses with existing grant/loan programs	MWVCOG, Business Oregon, SEDCOR, Economic Development Organizations
Support innovation resources for businesses and entrepreneurs seeking to adopt innovation practices and develop/launch innovation products including innovation hubs and accelerators	SEDCOR, MWVCOG, Chemeketa, OMEP, Economic Development Organizations, four year universities, innovation hubs, accelerators

Objective 1.4: Invest in business development that promotes resilience, inclusion, sustainability, and technology

Short Term Action Strategies	Who
Incentivize inclusive business development through certifications or employment opportunities for underrepresented groups	MWVCOG, SEDCOR, Economic Development Organizations
Develop resources to provide stable, sustainable, business assistance programming targeting businesses and entrepreneurs from underrepresented communities	MWVCOG, SEDCOR, Business Oregon, Chemeketa, OMEP, Willamette Workforce Partnership, philanthropic organizations, Economic Development Organizations
Encourage businesses to implement automation, improve production efficiency, and labor-saving practices that improve energy efficiency and environmental sustainability	MWVCOG, SEDCOR, Business Oregon, Chemeketa, OMEP, Willamette Workforce Partnership, Philanthropic Organizations, Economic Development Organizations



Goal 2 Workforce: Increase awareness of regional workforce training opportunities

Objective 2.1: Facilitate educational opportunities to train youth and/or current workforce in regionally significant sectors with future needs

Short Term Action Strategies	Who
Market regionally significant high need industries and jobs to K-12 families through field trips and educational materials	MWVCOG, WWP, SEDCOR, High School Career Technical Education Programs, Willamette Career Academy, School Districts, Businesses and Corporate Partners, Chambers of Commerce, Economic Development Organizations
Fund and increase availability of hands-on work training: internships and apprenticeship programs for traditional and non-traditional workers	MWVCOG, WorkSource Oregon and Willamette Workforce Partnership, CTECs, BOLI, K-12 education, Willamette Educational Service District, Economic Development Organizations, Economic Development Organizations
Fund training, marketing, and transition assistance for minority population access to regionally significant jobs	MWVCOG, Willamette Educational Service District, K-12 schools, Pathways Program, DevNW, Chambers of Commerce

Objective 2.2: Support living wage and holistic economic success of current and future workforce

Short Term Action Strategies	Who
Promote employer supported information about Oregon Health Care Plan and ACA enrollment to increase access to health services	MWVCOG, OHA, DHS Insurance Brokerages
Increase awareness of existing debt relief and financial literacy programs for working families and households experiencing poverty	MWVCOG, DevNW, WorkSource Oregon and Willamette Workforce Partnership, Marion County CDBG
Work with employers, community leaders, and housing developers to address the need for workforce housing	MWVCOG, OHA, local builders, county and city leaders, Business Oregon, SEDCOR

Objective 2.3: Address childcare needs and improve access to quality care

Short Term Action Strategies	Who
Seek public funding and develop incentives to address the region's childcare deserts and increase regulated childcare spots	MWVCOG, WWP, Love Inc., Family Building Blocks, Boys and Girls Club, YMCA, Head Start Programs, SEDCOR
Promote mixed use buildings with childcare facilities as part of Urban Renewal policies, community engagement, and workshops	MWVCOG, OEDA, Building Codes Divisions, DOE, Urban Renewal Districts, Local Jurisdictions

Objective 2.4: Improve community, home, and workplace resources to support workforce quality of life

Short Term Action Strategies	Who
Protect the natural environment and parks through technical assistance with local and regional park plan updates	MWVCOG, Soil and Water Conservation Districts; OR Parks and Rec; County Parks Departments
Promote a sense of community and belonging through diverse cultural festivals, events, and community partnerships	MWVCOG, Oregon Economic Development Association (OEDA), Travel Salem, Travel Oregon, Chambers of Commerce(s), DMOs, Downtown Associations, Main Street Programs
Incentivize symbiotic community and local business support with "shop local" days and local business representation in community organizations	MWVCOG, Chamber of Commerce(s), Main Street Organizations, Business Associations, Economic Development Departments for Cities, SEDCOR, Economic Development Organizations



Goal 3 Infrastructure: Create and enhance community infrastructure that promotes resilient growth and reduces disparity while driving economic development²

Objective 3.1: Align all new and existing community infrastructure with Oregon’s Natural Hazards Mitigation Planning (NHMP) Resilience Plan (9.2.3)

Short Term Action Strategies: <i>Water & Wastewater</i>	Who
Regularly assess the state of water allocation and storage	DEQ (for water quality), Sewer Authority, city/county governments, McMinnville Water and Light
Ensure adequate water/wastewater lines to new or existing businesses & commercial properties/lands (LaCreole Node Sewer Extension Project, Old Mill Site Improvement Project)	Chamber of Commerce(s), Main Street Orgs., Business Associations, Cities and community property owners, Dallas Urban Renewal Agency, Ash Creek Water Control District, Business Oregon, and private property owners
Support investments into already planned or ongoing building projects and updates (e.g. North Santiam Sewer updates; RTSP Project List; EDA Project Solicitation list)	MWVCOG, SKATS, state, county, city, and local communities, North Santiam Sewer Authority, Business Oregon, ODOT, DLCD, USDA
Increase capacity of water transmission mains (e.g. City of McMinnville and/or its local communities)	Local communities within Yamhill County, Yamhill County, and State, McMinnville Water and Light
Prioritize replacement of outdated water meters (Water Meter Upgrades)	Local communities, County, State
Develop and improve flood mitigation and stormwater systems (Old Mill Site Improvement Project, Godsey Road Improvement Project, City of McMinnville Third Street Improvement Project)	Cities, Urban Renewal Agencies, Ash Creek Water Control District, Business Oregon, and private property owners.

² Throughout Goal 3, [Priority Projects](#) that will further the MWV’s objectives are included where applicable.

Objective 3.1: Align all new and existing community infrastructure with Oregon’s Natural Hazards Mitigation Planning (NHMP) Resilience Plan (9.2.3). (Continued)

Short Term Action Strategies: <i>Transportation</i>	Who
Develop and improve infrastructure supporting multimodal transport and safety, such as roads/streets, intersections, sidewalks and curbs, bike lanes, etc. (Old Mill Site Improvement Project, Godsey Road Improvement Project, City of McMinnville Third Street Improvement Project)	OPRD; Travel Salem, Travel Oregon; local, state, and federal agencies; the state legislature, local federal delegation, McMinnville Urban Renewal Agency, McMinnville Downtown Association, area businesses and community members, Visit McMinnville, the McMinnville Economic Development Partnership, McMinnville Area Chamber of Commerce; ODOT, through Local Agency Agreement No. 31218 which allocates \$1,410,000 to the project (Godsey Road)
Replace and improve outdated bridge and rail systems (Godsey Road Improvement Project)	ODOT, local area agreements
Short Term Action Strategies: <i>Housing</i>	Who
Create and partner with organizations who are offering homeownership opportunities through down- payment assistance mechanisms.	DevNW (Polk, Marion), Open Doors HousingWorks (Yamhill), Valley Development Initiatives, municipal housing authorities, OHHS, Seeds of Faith Ministry, Unite Oregon, Farmworker Housing Development Corporation (FHDC)
Short Term Action Strategies: <i>Industrial Land</i>	Who
Develop a plan for a coordinated, regional approach to industrial lands	MWVCOG, DLCD, SEDCOR, Business Oregon, Regional Solutions, local government, Economic Development Organizations
Short Term Action Strategies: <i>Resilience</i>	Who
Enable building owners and tenants to properly brace and anchor deficient nonstructural elements within their buildings	MWVCOG, Local Emergency Management Agencies, DLCD, developers, banks and credit union’s commercial property owners, county housing departments

Objective 3.2: Enhance access to critical services in rural areas in the region

Short Term Action Strategies	Who
Further the deployment of broadband infrastructure (e.g., to schools and rural communities) through funding from NTIA and other available grant programs or funding opportunities	MWVCOG, Business Oregon Office of Broadband, internet service providers (e.g., PEAK Internet), local agencies, utilities, county, and local government
Evaluate transit connectivity between major hubs and smaller cities	MWVCOG; local, state, and federal agencies; ODOT, local government

Objective 3.3: Adopt a shared implementation framework that identifies regional infrastructure demand

Short Term Action Strategies	Who
Add infrastructure & affordable housing experts to the Advisory Group	MWVCOG, Business Oregon, city and county governments, Community Development Financial Institutions (CDFIs)
Consolidate the most current lists of regional infrastructure needs and prospective costs	MWVCOG, Business Oregon, city, and county governments
Determine affordable ways to implement Oregon's NHMP Resilience Plan across all infrastructure projects	MWVCOG, DLCD, local emergency managers, local governments
Facilitate matching fund opportunities for federal grants	MWVCOG, MWACT, EDA, Economic Development Organizations, Business Oregon
Facilitate a (bi)annual training to create/update the background necessary for each grant	TBD
Put a committee together which can ensure the interconnection of utilities at the regional level.	TBD
Evaluate and share methods of grant and loan procurement efficiency, for example, through a state agency contract, a CDBG model, or a streamlined/simplified application process.	MWVCOG
Regularly update CEDS Regional Resilience Metrics	MWVCOG (or contracted)



Goal 4 Collaboration: Strengthen regional collaboration through coordinated action, efficient funding distribution, and standardized growth measurement to achieve regional prosperity

Objective 4.1: Implement strategies that promote equity in both public/ private agencies

Short Term Action Strategies	Who
Encourage partnership and collaboration on project delivery through designs of policies, programs, and systems	Local regulatory agencies, COG, Business Oregon, Project design teams, Regional Solutions Office, EDD Partnership, Economic Development Organizations, SEDCOR
Leverage community-based organizations to lead meaningful community engagement in project identification and implementation to enhance planning processes	Local Governments, Chemeketa, Confederated Tribes of Grand Ronde, Neighborhood Associations, Local Agencies, Community Organizations (such as YMCA)
Develop and maintain progress-tracking metrics adoptable at the regional level	MWVCOG, EDD Partnership Board, SEDCOR, Business Oregon, DLCD

Objective 4.2: Facilitate information and resource sharing to advocate for community projects and policies

Short Term Action Strategies	Who
Trial a shared data platform for regionally tracked metrics and projects to improve data collection and use	MWVCOG, EDD Partnership Board, SEDCOR, Business Oregon, DLCD, DEVNW, Chemeketa, Regional Solutions Team
Advocate for funds at the regional level—like Metropolitan Planning Organizations (MPOs) to reduce the need to rely heavily on obtaining grants	MWVACT, MWCOG, EDD Partnership Board
Leverage joint applications and resource-sharing to enhance state funding allocation between the COG and EDD	MWVCOG, EDD Partnership Board

Objective 4.3: Develop, identify, and improve existing collaborative efforts

Short Term Action Strategies	Who
Reinforce connections between rural and urban areas to further support entrepreneurial opportunities and market connections	MWVCOG, County SEDCOR, Business Oregon, local governments, entrepreneurship, and innovation partners, Economic Development Organizations, SBDC, Linfield and George Fox Universities
Allocate existing capacity and resources for coordination between and beyond the three counties	SEDCOR, MWVCOG, local governments, Confederated Tribes of Grand Ronde, Chemeketa, Business Oregon, Economic Development Organizations
Look for opportunities to hire staff that represent the diversity of their counties	MWVCOG
Undertake a comprehensive regional and district-wide Holistic Needs Assessment (HNA) to benefit all communities, including the regional workforce	MWVCOG, state government, local government, SEDCOR, Business Oregon, DevNW

Evaluation Framework

The evaluation framework allows the Mid-Willamette Valley to gauge progress on the successful implementation of the 2023 CEDS. These progress check-ins keep the strategic direction and action plan outlined in the CEDS current and relevant. The metrics should help to answer the questions “How are we doing?” and “What can we do better?”

The Mid-Willamette Valley encourages increased economic resiliency, progress on climate change adaptation, and regional harmony with complementary planning documents. The evaluation metrics detail progress on implementation of the CEDS vision, goals, and objectives. Evaluation metrics are most directly tied to the progress of action strategies over the course of the CEDS five-year timeframe or annually. Successful progress could be measured through:

- Updated economic conditions, projects, or data
- Development of necessary partnerships
- Increase in desired outcomes, such as scholarships, events, or revenue
- Frequency of engagement or participation
- Increased consistency across organizations and plans



This section summarizes many of the economic aspirations of the Mid-Willamette Valley and is not limited to what can be realized with the timeframe and capacity of the region.

For the detailed list of short and long term goals and indicators of evaluation, please see the Excel spreadsheet supplied with the CEDS document or [Appendix F: Full Action Plan](#).

Evaluation Framework

EVALUATION

FRAMEWORK:

Evaluation metrics are meant to measure the success of action items.

Progress can be:

- Level of frequency of participation
- Level of compliance with regulations
- Frequency of engagement
- Jobs or increased revenue

Evaluation metrics should determine project updates based on:

- When is review needed?
- Does the metric determine a timeframe?
- What kind and when is data available?
- Does the action item need continuation?

Phases of a project good for evaluation:

- Before starting a project or program
- When outlining a project or program
- Once it is underway
- Once it is finished

GOAL 1: BUSINESS

More community funding applications submitted & received

Increased public+private partnerships

Stronger location quotients for regionally significant industries

Number of patent applications submitted & received

Percent of Industry exports

Number of shop local days

GOAL 2: WORKFORCE

Number of scholarships to trade school

Increased enrollment in health care insurance

Increased financial literacy

Increase of publicly funded childcare spots

Increased permits for childcare facilities

Geographic dispersion of social services

Increased number of targeted workforce training and support

GOAL 3: INFRASTRUCTURE

More efficient use of public resources

Per capita water consumption rates

Increased job creation

Number of new homes constructed by type/size/tenure

Number of federally funded projects

Increased housing production strategies

Increase in number and size of "shovel-ready" industrial sites

GOAL 4: COLLABORATION

Regional procedure for inclusive project prioritization

Increased community satisfaction with government engagement

Regional data platform workgroup formed

Percent increase in data driven decision-making

Number of new public-private partnerships

Increased community partnership with COG

Appendix A: Regional Context

Regional Profile

Please note that all information contained in this appendix, unless otherwise cited, has been taken from the 2018 update of the MWVCOG CEDS. We have included additional demographic information where possible using more recent data sources.

Geography

The Mid-Willamette Valley region lies near the center of the Willamette River Basin in northwestern Oregon. It includes Polk, Marion, and Yamhill counties. Salem, the state capital, is the region's largest city. The Salem metropolitan area is approximately 50 miles from Portland and 60 miles from Eugene. The three-county land area is 2,629 square miles, nearly one-quarter of the total land area in the Willamette Valley.

The area is framed by the Chehalem Mountains in the north, the Coast Range in the west and the Cascade Mountains in the east. The average elevation of the Valley floor is about 250 feet. The Coast Range mountains are low, rounded, and heavily eroded, generally 2,500 to 3,000 feet in elevation. The Western Cascades are mostly forested with steep gorges and elevations of 5,000 feet are common for their highest peaks. Mt. Jefferson, located in the southeastern corner of Marion County, is the highest point in the region, and the second highest peak in Oregon at 10,497 feet.

Figure A-1. Mid-Willamette Valley Region



Source: Mid-Willamette Valley Council of Governments, 2018 demographics

Climate

As with most of the Willamette Valley, the three-county area enjoys a mild “modified marine” climate. Annual rainfall averages from 45 inches on the Valley floor to more than 100 inches in the Coast Range. Precipitation in the three-county area is seasonally distributed. Approximately 75 percent of the Valley’s rainfall occurs from November through March while July and August often experience less than two percent of the year’s rain. Temperatures throughout the year are usually mild with mean daily temperatures in January ranging from 30 to 40 degrees Fahrenheit and 65 to 70 degrees Fahrenheit in July.

Water Resources

Oregon will be a water deficient state by the year 2070, according to the state's Water Resources Board assessment of long-range water requirements. The most serious problems, however, lie east of the Cascade Mountains where vast areas are arid. The portion of the state west of the Cascades has a projected surplus of 14,210,000 acre-feet of water in the year 2070.

The Mid-Willamette Valley has abundant rainfall, numerous rivers and streams that are also fed by melting mountain snow, and adequate groundwater. The major rivers such as the Willamette, North Yamhill, South Yamhill, and North Santiam play an extremely important role in handling seasonal runoffs and providing water for irrigation, municipal and industrial uses. Heavy winter precipitation upon relatively impermeable soils and rock formations leads to very heavy run-off during winter months and contributes to periodic flooding. In 2021, several cities including Amity, Falls City, Independence, Jefferson, and Willamina received a combination of Community Development Block Grant and USDA funding to improve water intake and wastewater systems. These are key efforts in providing safe drinking water to residents in the region. However, there is still a need in many areas of the Valley for better storm drainage and water storage.

Population growth and development are putting severe pressure on groundwater resources. A number of areas within the region have been identified as "groundwater limited" and "groundwater restricted" by the Department of Water Resources. Municipalities such as Dayton, Hubbard, Newberg, and Mt. Angel.

Energy Resources

The major energy resource in the three-county area and in Oregon is hydroelectric power. The Bonneville Power Administration has large hydroelectric generating plants on the Columbia River that produce significant amounts of electricity for Oregon, Washington, Idaho, and portions of California.

Oregon does not produce significant amounts of oil or gas and must import these sources of energy from outside the state. A great deal of undeveloped potential exists in the state for geothermal energy and additional hydroelectric power produced by pumped-storage installations which use surplus runoff water to generate power to pump water into upstream storage basins for use during low flow periods. The Coastal Range area has enormous potential for pumped storage installations.

Efforts to become less reliant on foreign oil have led to greater development of alternative energy resources such as solar power, wind, and biomass facilities.

Land Use

The three counties occupy 2,656 square miles. Forest and farm woodlots comprise around 50 percent of the region, making it the largest single usage category. Farmlands occupy approximately 35 percent of the three-county land area, greater than the state's average of 30 percent. Figure A-2 below shows the amount of land in farms in Marion, Polk, and Yamhill counties in 2012 and 2017. Marion and Polk County experienced an increase in the amount of farmland over this period while Yamhill County saw a decline.

Figure A-2. Farmland in the Mid-Willamette Valley, 2012-2017.

County	2012 Land in Farms (acres)	2017 Land in Farms (acres)	Change	Percent Change	Percent of Land Area in Agriculture
Marion	286,194	288,671	2,477	1%	38%
Polk	144,748	148,905	4,157	3%	31%
Yamhill	177,365	169,357	-8,008	-4.5%	37%

Source: USDA Agricultural Census, Land in Farms Quick Facts by County, Table 8, 2012 and 2017

The State of Oregon has a statewide land use planning system that requires incorporated cities and counties to prepare comprehensive plans consistent with local and state goals and policies that govern the use of all lands. In general, these policies preserve prime farmland, timberland, scenic areas, stream sides and wildlife habitats. The comprehensive plans establish urban growth boundaries for each community and identify and zone industrial, commercial, and residential areas within these boundaries, promoting contiguous compact urban growth. Lands outside these established boundaries are generally not available for commercial or industrial development.

Statewide land use laws have had a positive impact on preserving farm and forest resources; however, many urban growth boundaries, created over 40 years ago, are impeding economic growth. Communities lacking a sufficient supply of vacant land within their urban growth boundaries (UGBs) will need to expand their UGBs to accommodate future residential, commercial, and industrial development, as demonstrated by the cities of Donald, Hubbard, Lafayette, Sublimity, and Dayton.

Agriculture, Forest, and Fisheries Resources

The Mid-Willamette Valley region is the most productive agricultural region in the state in terms of the total value of crops produced. All three counties have consistently led the state in agricultural sales. In 2019, Marion County led in total value of agricultural products sold with \$702 million in sales, an 18% increase from 2012, accounting for 14% of all sales in Oregon. Yamhill County ranked 6th in the state with total agricultural sales amounting to \$314 million. Polk County received \$135 million in sales and ranked 11th in the state.³

An important feature of the region's agriculture is its diversity. Rich soils, favorable climate conditions, abundant rainfall, and significant levels of agribusiness investment and expertise have all contributed to the high productivity of farming in the region. For example, nearly 200 crops are grown commercially in Marion County alone, helping Marion County be established as a national leader in the production of blackberries, raspberries, hazelnuts, hops, grass seed, and Christmas trees. However, the Mid-Willamette Valley's agriculture industry is characterized by relatively small farming operations, not dominated by huge corporate farms, as is increasingly the case in some parts of the U.S.

The region's significant forestlands continue to be an important natural resource. Forest products employment, though still significant, makes up a smaller percentage of the region's total economy. Timber acres harvested in the Mid-Willamette Valley were approximately 8.6% percent of the total timber acres harvested in Oregon in 2019 and 7.8% in 2002, however, still saw an increase of 10% over the last 17-year period.

Figure A-3. Timber harvest data in the Mid-Willamette Valley 2002 and 2019.

County	2002 Total	2019 Total	2002 Percent of Oregon Total	2019 Percent of Oregon Total
Marion	67,724	42,072	1.70%	1.90%
Polk	118,606	108,467	3.00%	3.30%
Yamhill	120,809	115,308	3.10%	3.40%
MWV Region	307,139	265,847	7.8%	8.60%

Source: Oregon Timber Harvest Data, [open data portal by county](#), Dept. of Forestry. 1962-2019.

³ Census of Agriculture - 2017 Census Publications - State and County Profiles - Oregon.
www.nass.usda.gov/Publications/AgCensus/2017/Online_Resources/County_Profiles/Oregon/index.php.

Demographic Data

Population Growth

The population of the Mid-Willamette Valley is expected to grow in the next few decades as a result of in-migration from other states and Oregon counties. Marion County is expected to experience the largest population growth, with an additional 67,000 residents by 2045. Yamhill County is projected to see the smallest population growth in the region, but will still gain almost 29,000 additional residents by 2045.

Figure A-4. 2045 Population Growth and Projections for Oregon, Marion, Polk, and Yamhill Counties

County	2020 Population	2045 Population Projection	Projected Change
Marion	349,121	416,327	+ 67,206
Polk	83,805	128,783	+ 44,978
Yamhill	105,911	134,702	+ 28,791

Source: Portland State University Population Research Center, [current summary forecast all areas](#), 2022-26

Race/Ethnicity

The populations of Marion, Polk, and Yamhill counties are predominantly White (Figure A-5). Yamhill County is the least diverse, with nearly 86% identifying as not Hispanic or Latino and 78% identifying as White. Marion County has the highest proportion of Hispanic or Latino residents, at nearly 27% of its population. This is higher than the Oregon state average (14%).

Figure A-5. Population by Race, Marion, Polk, and Yamhill Counties, 2021

Race/Ethnicity	Marion County	Polk County	Yamhill County	Total
Not Hispanic or Latino:	73.1%	85.7%	84.1%	77.3%
White Alone	64.4%	77.5%	76.7%	68.9%
Black or African American Alone	0.9%	0.6%	0.7%	0.8%
American Indian and Alaska Native Alone	0.5%	1.6%	0.9%	0.8%
Asian Alone	2.2%	1.5%	1.4%	1.9%
Native Hawaiian and Other Pacific Islanders Alone	1.0%	0.4%	0.3%	0.7%
Some Other Race Alone	0.3%	0.2%	0.0%	0.3%
Two or More Races	3.8%	3.8%	4.0%	3.8%
Hispanic or Latino:	26.9%	14.3%	15.9%	22.7%
White Alone	14.0%	8.9%	9.5%	12.3%
Black or African American Alone	0.2%	0.0%	0.0%	0.1%
American Indian and Alaska Native Alone	0.3%	0.3%	0.3%	0.3%
Asian Alone	0.1%	0.0%	0.0%	0.1%
Native Hawaiian and Other Pacific Islanders Alone	0.0%	0.0%	0.0%	0.0%
Some Other Race Alone	7.5%	3.3%	4.4%	6.2%
Two or More Races	4.8%	1.7%	1.7%	3.7%

Source: American Community Survey, 2021 5-year estimates, DP05

Health Services

The Mid-Willamette Valley is served by several quality hospitals and medical service centers located in the cities of Salem, Silverton, Stayton, McMinnville, and Newberg. In 2022, The West Valley Hospital in Dallas merged with the Salem Hospital and was moved from Dallas to Building B at the Salem Hospital's main facility. The Dallas facility still provides imaging and lab services.

Providing quality medical services to rural regions continues to be a challenge. In addition to the need for smaller hospitals to modernize their facilities, the demand for quality medical facilities and services will continue to grow as the population ages.

Education

The Mid-Willamette Valley is home to several colleges, universities, and training centers. Area universities and colleges include Willamette University (Salem), Western Oregon University (Monmouth), Linfield University (McMinnville), George Fox University (Newberg and various locations), and Corban University (Turner). The area also has several community colleges with branches located in communities throughout the region. Local community colleges in the Mid-Willamette Valley include Chemeketa Community College and a branch campus of Portland Community College in Newberg.

Cultural and Recreational Facilities

A plethora of cultural and recreational facilities provide Mid-Willamette Valley residents and tourists with activities to enjoy throughout the year. Community festivals occur in every season, such as Mt. Angel's Oktoberfest and the Woodburn Tulip Festival, with each providing an opportunity to experience the charm of small-town hospitality and the bounty of the region's rich agricultural resources. As a growing number of wineries take hold in the region, wine-tasting tours have become a popular activity in Yamhill and Polk counties. Additionally, the Spirit Mountain Casino and annual powwows hosted by the Confederated Grande Ronde Tribe are another regional draw.

Salem offers many cultural opportunities, including the historic Elsinore Theater, Hallie Ford Museum, Mission Mill, A.C. Gilbert Discovery Village Children's Museum, and the World Beat Festival held every June. Recreation opportunities for all ages are available at the recently completed Kroc Center in Salem, the Dallas Aquatic Center, the McMinnville Aquatic Center, Willamette Mission State Park, Detroit Lake, and numerous parks available throughout the region. Additional attractions include the Oregon Garden near Silverton and the Evergreen Museum and Waterpark.

Environmental Quality

Air Quality: While the Mid-Willamette Valley can be challenged by poor air quality in late summer and early fall when polluted air and wildfire smoke are trapped inside the valley, there are no non-attainment areas in the region according to the Oregon Department of Quality (Oregon Department of Environmental Quality, 2018).

Water Quality: The region is located within the Willamette River Basin. The Oregon Department of Environmental Quality (DEQ) in response to the federal Clean Water Act identifies surface water bodies that fail to meet water quality standards. This list is called the 303(d) list and is published by the DEQ every three years. Plans to improve water quality must be developed when a water body is placed on the 303(d) list. Within the Mid-Willamette Valley, the Willamette River and several rivers and streams that feed into the Willamette have been identified as 303(d) rivers and streams. In 2006, the DEQ established TMDLs for temperature, mercury, and bacteria to further efforts to improve water quality in these rivers and streams.

Land Quality: The Mid-Willamette Valley is served by several solid waste disposal services, many of which offer curbside recycling programs to reduce the amount of solid waste disposed of in local landfills. The Oregon DEQ also maintains searchable databases with information on contaminated land sites throughout the state. There are many brownfield sites within the City of Salem and throughout the Mid-Willamette Valley region. Additional assessment information is needed to identify the severity of these sites and the appropriate reclamation actions needed to redevelop these sites. As the region continues to grow, it will be important to balance the increased demand for natural resources with environmental quality.

Natural Disasters

Flooding is the most frequent and significant natural hazard in the region. Riverine flood danger is highest during the winter and early spring months, with the onset of persistent, heavy rainfall and the melting of snow in the Cascade and Coast Ranges, respectively. The last major flood occurred in 1996 and caused substantial damage to many businesses and structures. Cities and counties within the region participate in the National Flood Insurance Program (NFIP) to reduce future effects of flooding and provide insurance to property owners who suffer damage caused by flooding.

Many areas within the region, particularly in hilly or mountainous areas, are also susceptible to landslide hazards. In general, areas with steep slopes, high groundwater tables, and highly weathered rock are prone to sliding. Human activity can also increase natural slide hazards. The State of Oregon Department of Geology and Mineral Industries (DOGAMI) inventory areas throughout the state that are prone to landslide hazards. In response to these inventories, many cities have established local landslide hazard protection ordinances to reduce loss of life and property. Additionally, the region increasingly must begin to plan for and address the destruction caused by recent wildfires along with rising heat in the summer months. Finally, while not a frequent

hazard, seismic activity generated by the Cascadia Subduction Zone is another concern for the region.

With so many potential risks, all three counties and several cities in the region have developed mitigation plans to minimize damage caused by natural hazards. These plans were developed through their respective Offices of Emergency Management and in partnership with the Oregon Office of Emergency Management.

Transportation

The Mid-Willamette Valley is well served by major highway and rail links and large international port facilities in Portland 50 miles to the north. There is a wide network of farm-to-market roads in the most intensive agricultural areas of each county enabling the flow of goods within the region.

Commercial air service began again in October 2023 as Avelo Airlines announced non-stop commercial air service from Salem Municipal Airport to Las Vegas, NV, and Los Angeles, CA (Burbank). Frequent bus shuttle service is also available to Portland International Airport from Salem and communities on the I-5 corridor such as Woodburn. The region is also served by the McMinnville Municipal Airport, the Independence State Airport, and the Aurora State Airport. Private landing strips exist in Woodburn and Newberg which serve business or recreational users.

Amtrak provides passenger rail and bus service in Salem with service running regularly to points both north and south. Regular public transit service is provided in the Salem-Keizer area, Woodburn, and Yamhill County. Transit connections are available both inter and intra-regionally to transit services located in Wilsonville, Canby, Oregon City, and Forest Grove. The list of transportation improvements needed in the region far exceeds the availability of funding revenues.

The Mid-Willamette Area Commission on Transportation (MWACT), formed in 1998, reviews regional transportation issues to provide policy guidance on these issues. This body has adopted strategies and proposed actions for addressing transportation needs that are available for additional reference at the Mid-Willamette Valley Council of Government's [website](#) (MWCOG).

The most recent set of high priority transportation investment priorities (2021) identified by the Mid-Willamette Area Commission on Transportation (MWACT) are listed below (not ranked in priority order). It is important to note that, while the projects listed below are the highest priority needs for high-cost projects, there are many other transportation projects that may be needed for a strong and healthy region.

Figure A-6. MWACT IJJA Priority Projects 2021

Project	County
Newberg-Dundee Bypass	Yamhill
New Salem Bridge	Marion
OR22 at OR51	Polk
OR18 Grand Ronde	Polk

Source: 12/20/21 MWVACT memo, Ken Woods Jr, Chair, IJJA Flexible Funds

This project list is not exhaustive, there are other projects of regional and statewide significance that are important to the communities within the MWACT area to be considered. A living regional project list was constructed as part of this report and is available upon request with the Mid-Willamette Valley Council of Governments.

Other Infrastructure Systems

Aging water and sewer systems and the demands placed on public services by rapid population growth have resulted in a significant need for re-investment in most cities in the region. The Mid-Willamette Valley COG works closely with local and state partners, such as the DEQ, Business Oregon, the Mid-Valley Regional Solutions Team, and other EDDs, to review funding opportunities and leveraging of funds for our local communities.

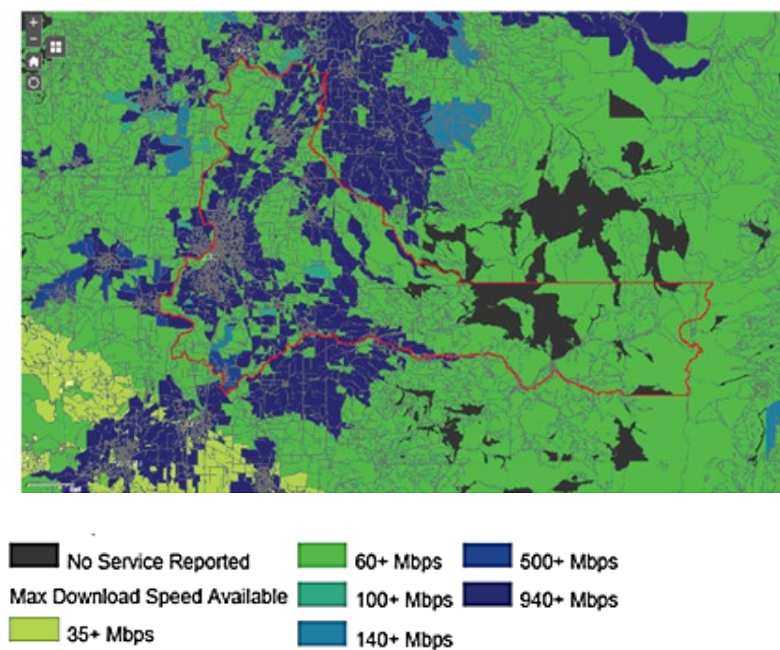
The need for more infrastructure investment presents many rural communities with serious financial challenges. Among the complicating factors are:

- Declining forest products and agricultural employment and lower per capita incomes in some rural cities have eroded the local tax and rate base needed to service debt.
- Other cities such as Donald, Dundee, Lafayette, and Woodburn, rapid population growth has forced sooner-than-anticipated capital spending to keep up with surging demand.
- New, more stringent health and environmental standards from state and federal regulatory agencies require major new investments in facilities and equipment and, in some cases, resulting in higher operating costs.

Broadband

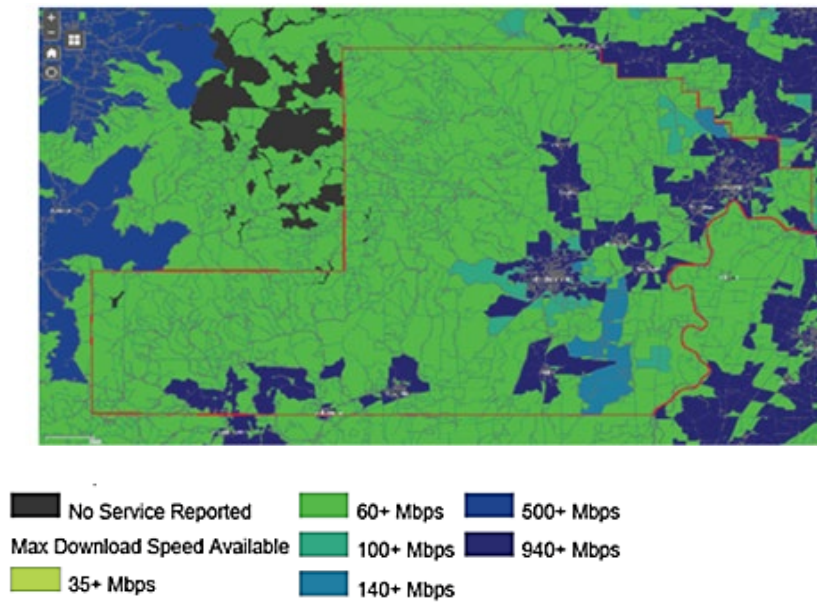
The provision of telecommunications and access to broadband services is another infrastructure concern in the region. Coverage has expanded recently but there are still service gaps in rural areas. Larger population centers such as Salem and Keizer appear to offer enough short-term profit potential to attract adequate private investment in fiber optic lines and other necessary infrastructure improvements. Smaller, more rural communities are often not well served by broadband reporting much lower rates of DPS speed than large population centers as seen in the maps of Marion, Yamhill, and Polk Counties in Figures A-7, Figure A-8, and Figure A-9.

Figure A-7. Broadband Access and Speed in Marion County 2020



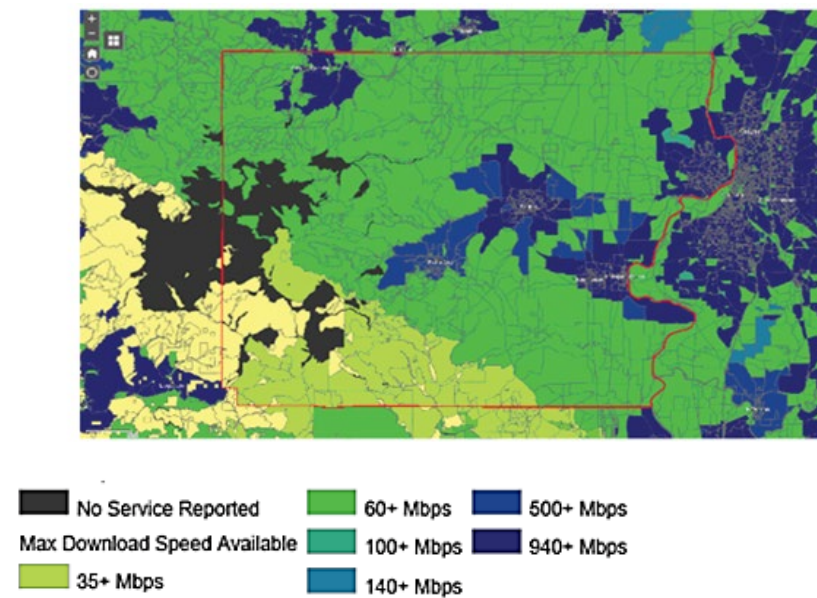
Source: Business Oregon Broadband map,
https://tools.oregonexplorer.info/geo_agol_viewer/index.html?viewer=broadband

Figure A-8. Broadband access and speed in Yamhill County, 2020



Source: Business Oregon Broadband map,
https://tools.oregonexplorer.info/geo_agol_viewer/index.html?viewer=broadband

Figure A-9. Broadband access and speed in Polk County, 2020



Source: Business Oregon Broadband map,
https://tools.oregonexplorer.info/geo_agol_viewer/index.html?viewer=broadband

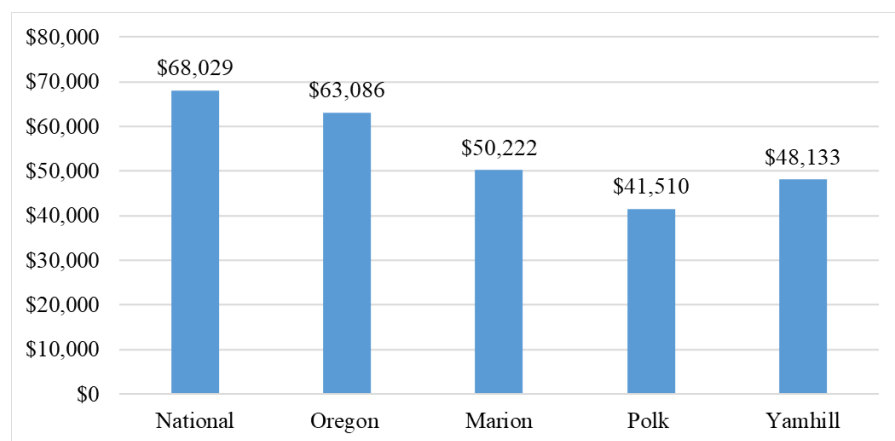
Business Oregon is currently managing the Rural Broadband Capacity program, funded in 2020 by the Oregon Legislature and CARES Act. In Polk County, Independence and Monmouth received a nearly \$240,000 grant. The Gervais Highway FTTH and the Ziply Fiber Detroit/Idanha projects in Marion County received \$175,000 and \$627,300, respectively.⁴

According to the Oregon broadband assessment and best practices study of 2020 broadband is an integral infrastructure needed to maintain healthy economies. “...Without at least Basic Broadband, communities risk losing businesses and population, as well as finding it increasingly difficult to attract new residents and businesses. Moreover, the populations that communities risk losing are in the very segments they can least afford to lose. Broadband is an essential factor in deciding to remain in a location for almost half of businesses.”⁵

Employee Wages

Covered average private sector wages in the Mid-Willamette Valley were lower than the state and national average in 2021 (Figure A-10).

Figure A-10. Average Wage for Private Industry in MWV Compared to Oregon and the US, 2021.



Source: Oregon Employment Department, Covered Employment and Wages 2021, private industry only

⁴ “Business Oregon : Rural Broadband Capacity Program : Rural Broadband Capacity Program : State of Oregon.” Rural Broadband Capacity Program : Business Oregon, www.oregon.gov/biz/programs/ruralbroadbandcapacityprogram/pages/default.aspx

⁵ Oregon Statewide Broadband Assessment and Best Practices Study Prepared for: Oregon Business Development Department January 31, 2020

Figure A-11. Annual Average Wage by Broad Industry, 2021

Industry	National	Oregon	Marion	Polk	Yamhill
Total private coverage	\$68,029	\$63,086	\$50,222	\$41,510	\$48,133
Natural resources and mining	\$61,478	\$43,594	\$41,144	\$43,361	\$44,388
Construction	\$69,855	\$70,085	\$64,920	\$57,321	\$57,928
Manufacturing	\$76,580	\$78,432	\$52,391	\$50,924	\$61,281
Trade, transportation, and utilities	\$55,728	\$53,109	\$46,003	\$40,915	\$42,401
Industry	National	Oregon	Marion	Polk	Yamhill
Information	\$152,651	\$113,955	\$80,755	\$52,040	\$91,974
Financial activities	\$115,238	\$86,091	\$65,667	\$54,875	\$63,762
Professional and business services	\$90,064	\$88,684	\$56,436	\$45,465	\$58,896
Education and health services	\$58,119	\$57,504	\$58,021	\$40,504	\$44,746
Leisure and hospitality	\$28,541	\$27,054	\$22,676	\$20,464	\$25,009
All Others	\$47,328	\$45,007	\$36,910	\$32,288	\$33,705
Total all government	\$65,170	\$69,636	\$74,415	\$58,926	\$60,550

Source: Oregon Employment Department, covered wages: annual average wage by industry, 2021

Government employees in Marion County earn around \$74,400 annually, slightly more than the state and national average (\$69,636 and \$65,170 respectively) while Polk and Yamhill County earned less. Higher government and health care wages in Marion County (compared to the state) are attributed to the fact that the state capital resides in Salem and Salem is a regional health care hub. Information is the highest paying private industry in the region at \$75,000 annually, while Leisure and Hospitality are the lowest paid at \$22,700 annually. On average, most industries pay workers less in the Mid-Willamette Valley than the state.

Access to Capital

According to early versions of the [Oregon Capital Scan](#), enabling a growing Oregon economy and welcoming an entrepreneurial environment will nurture emerging companies and help make Oregon an attractive place for entrepreneurs. Assessing gaps and improving access to available capital can help Oregon become a more supportive place for new company formation and growth. Many Economic Development Districts (EDDs), including the Mid-Willamette Valley Council of Governments, serve as regional gap financing entities recognized by the U.S. Department of Commerce's Economic Development Administration. EDDs originate, package, and administer loans through various programs. Many EDDs also offer other business resources to

microenterprises and small businesses throughout Oregon. In 2020, cities within the Mid-Willamette Valley region offered several grant programs seen in the table below.

Figure A-12. City Grants Programs in Mid-Willamette Valley.

City	Type of Grant	# Of Grants	Total Grant Dollars
Silverton	Building Improvement Grant	2	\$180,000
Silverton	Façade/Building Improvement	1	\$9,750
Monmouth	Façade Improvement Grant	1	\$15,000
Salem	Riverfront Capital Grant	15	\$2,269,974
Salem	North Gateway Grant	2	\$338,993
Salem	Riverfront Strategic Grant	3	\$253,855
Salem	West Salem Grant	3	\$511,766

Source: Capital Scan, 2020-2022, City Grant Programs by Region, Self-reported data

MWVCOG administers a regional revolving loan fund, a rural community loan fund, SBA 504 loans, SBA Intermediary Lending Pilot Program loans, and SBA Community Advantage loans. The COG also manages revolving loan funds for the cities of Independence, Newberg, and Yamhill County. MWVCOG also partners regionally with Business Oregon's programs.

During the pandemic, regional business loan programs were supplemented with federal pandemic pass-through dollars. From 2018-2020, the MWVCOG received nearly \$2.6 million in Emergency Business Assistance Grants ([Oregon Capital Scan](#)), the second highest amount in the state.

Local jurisdictions of various sizes also received COVID-19 relief funds. The following table lists the relief grants received in the Mid-Willamette Valley from the first three rounds of funding passed through Business Oregon during the pandemic.

Figure A-13. COVID-19 Relief Funds Grant Recipients in Rounds 1, 2, and 3

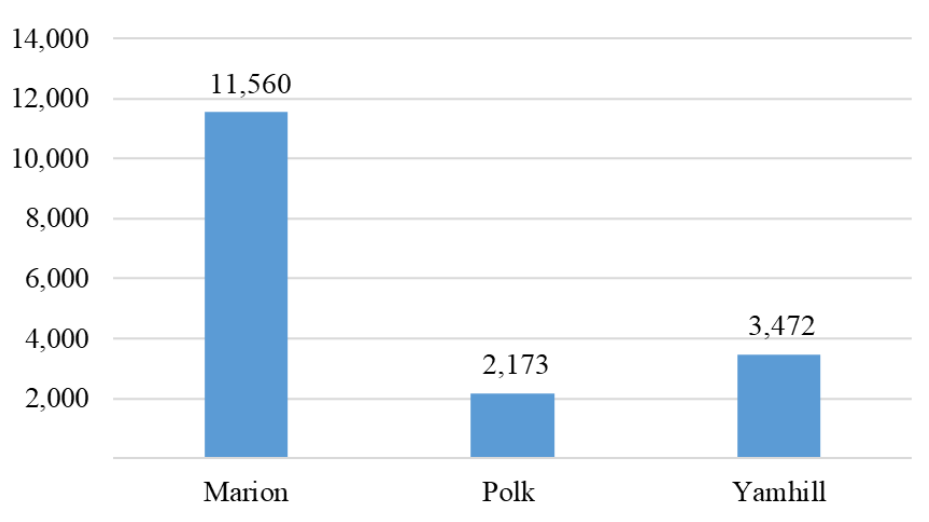
Recipient	County	Award
Carlton	Yamhill	\$12,500
Dallas	Polk	\$45,000
Independence/Monmouth	Polk	\$45,000
Keizer	Marion	\$45,000
MWVCOG	Valley	\$1,092,000
Silverton	Marion	\$15,000
Stayton	Marion	\$25,000
Turner	Marion	\$15,000
Community Lending Works (CLW)	Valley	\$300,000
Yamhill	Valley	\$100,000
Salem	Marion	\$238,000
Marion	Valley	\$60,000

Source: 2022 Oregon Capital Scan, Business Oregon dispersed Covid Relief pass through funds

Business and Employment Indicators

In 2021, Marion County had the most private industry businesses in the Mid-Willamette Valley. This is likely due to the larger cities in the county, including the state capital Salem, and its proximity to the Portland Metropolitan Area.

Figure A-14. Private Businesses by MWV County, 2021



Source: Oregon Employment Department, www.qualityinfo.org, Covered Employment, Detailed Private Industry by County, 2021

Location Quotients

The location quotients presented below involve a filtered view of the main industries and are relative to the state of Oregon, not the nation (run by the Oregon Employment Department). As such, what they may not capture are industries that Oregon itself specializes in since Oregon is the reference data. In addition, some data is small, and the location quotients should be evaluated in a broader context. For example, a small number may indicate the data is noisy, rather than showing some deficiency. Additionally, being locally deficient in an industry is not always negative. There are many reasons why an industry will succeed or not within an area, and not every region can specialize in each industry.

Business Units

When considering the total number of business units or establishments by industry, all three counties in the Mid-Willamette Valley have some degree of specialization in Agriculture, Forestry, Fishing, and Hunting; and Construction. All three counties have fewer businesses working in Wholesale Trade and Transportation, Warehousing, and Utilities than the state. Polk County has a specialization in Education and Health services, specifically in Health Care and Social Assistance while Yamhill County has a specialization in Manufacturing.

Employment

Location quotients that consider the total employment by industry reveal that all three counties in the Mid-Willamette Valley have a specialization in Natural Resources (Agriculture) relative to the state of Oregon. Marion and Yamhill county's highest LQ are for Agriculture, Forestry, Fishing, and Hunting, suggesting a high degree of employment within that industry. Marion County's lowest LQ concentration is in Information, Polk County's lowest is in Wholesale Trade, and Yamhill County's is in Transportation, Warehousing, and Utilities. All three counties have fewer workers employed in Information, Wholesale Trade, and Professional and Business Services compared to the rest of the state.

≥ 1.2	Some sort of specialization
≤ 0.8	The region may be deficient
-	Can be ignored. Data not available.
(c)	Data suppressed

Figure A-15. Concentration of Business Units in the Mid-Willamette Valley

Industry	Establishments				Establishment Location Quotients		
	OR	Marion	Polk	Yamhill	Marion	Polk	Yamhill
Total private coverage	165,925	11,560	2,173	3,472			
Natural resources and mining	4,776	534	148	223	1.60	2.37	2.23
Agriculture, forestry, fishing, and hunting	4,638	523	146	217	1.62	2.40	2.24
Mining, quarrying, and oil and gas extraction	138	11	1	6	1.14	0.55	2.08
Construction	15,358	1,478	247	388	1.38	1.23	1.21
Manufacturing	6,462	415	88	292	0.92	1.04	2.16
Trade, transportation, and utilities	26,162	1,745	243	470	0.96	0.71	0.86
Wholesale trade	8,674	442	50	133	0.73	0.44	0.73
Retail trade	13,662	1,070	134	270	1.12	0.75	0.94
Information	4,994	176	39	56	0.51	0.60	0.54
Financial activities	13,405	938	161	231	1.00	0.92	0.82
Real estate and rental and leasing	6,651	456	78	108	0.98	0.90	0.78
Professional and business services	28,590	1,671	268	449	0.84	0.72	0.75
Education and health services	28,913	2,332	514	669	1.16	1.36	1.11
Health care and social assistance	26,611	2,197	496	621	1.19	1.42	1.12
Arts, entertainment, and recreation	2,065	126	23	27	0.88	0.85	0.62
Total all government	5,458	546	91	120			

Source: Oregon Employment Department, special request from covered employment, 2021

Figure A-16. Total MWV Industry Employment and Location Quotients Compared to Oregon, 2021

Industry	Employment				Employment Location Quotients		
	OR	Marion	Polk	Yamhill	Marion	Polk	Yamhill
Total private coverage	1613239	121575	15831	32149			
Natural resources and mining	54597	9861	1698	3635	2.40	3.17	3.34
Agriculture, forestry, fishing, and hunting	52786	9594	(c)	3578	2.41	(c)	3.40
Mining, quarrying, and oil and gas extraction	1811	267	(c)	57	1.96	(c)	1.58
Construction	110245	11106	1302	1934	1.34	1.20	0.88
Manufacturing	186367	9886	2037	6561	0.70	1.11	1.77
Trade, transportation, and utilities	357999	27471	2526	4981	1.02	0.72	0.70
Wholesale trade	74493	3608	316	750	0.64	0.43	0.51
Transportation, warehousing & utilities	75391	6641	436	455	1.17	0.59	0.30
Information	34948	1321	86	279	0.50	0.25	0.40
Financial activities	84311	5299	444	1048	0.83	0.54	0.62
Finance and insurance	55993	3411	241	715	0.81	0.44	0.64
Real estate and rental and leasing	28319	1888	203	333	0.88	0.73	0.59
Professional and business services	250006	14021	1349	2199	0.74	0.55	0.44
Education and health services	294737	25892	3613	7142	1.17	1.25	1.22
Health care and social assistance	266161	23300	3469	5322	1.16	1.33	1.00
Leisure and hospitality	174212	11798	2056	3227	0.90	1.20	0.93
Arts, entertainment, and recreation	20476	1155	200	192	0.75	1.00	0.47
Accommodation and food services	153736	10643	1856	3035	0.92	1.23	0.99
Total all government	267657	35229	4813	4182			

Source: Oregon Employment Department, special request from covered employment, 2021

Total Wage

The total wage LQ analysis reveals county specific specialization in certain industries by total wages earned. Natural Resources have high LQ in each county, suggesting that Agriculture is lucrative for the region. Agriculture has the highest LQ in Marion and Yamhill counties. Low LQ scores in Information, Financial activities (specifically Real Estate and Leasing), Professional Business Services, and Arts, Entertainment, and Recreation, have low LQ in each county suggesting low rates of financial significance for each of these industries. In other words, these industries do not result in a significant portion of the wages earned in each county relative to the rest of Oregon.

Figure A-17. Total MWV Industry Wages and Location Quotients Compared to Oregon 2021

Industry	Total Wages				Location Quotients		
	OR	Marion	Polk	Yamhill	Marion	Polk	Yamhill
Total private coverage	\$ 101,772,949,903	\$ 6,105,784,274	\$ 657,145,501	\$ 1,547,415,966			
Natural resources and mining	\$ 2,380,076,018	\$ 405,723,452	\$ 73,626,156	\$ 161,348,960	2.84	4.79	4.46
Agriculture, forestry, fishing, and hunting	\$ 2,259,292,998	\$ 386,422,612	(c)	\$ 157,331,843	2.85	(c)	4.58
Mining, quarrying, and oil and gas extraction	\$ 120,783,020	\$ 19,300,840	(c)	\$ 4,017,117	2.66	(c)	2.19
Construction	\$ 7,726,517,403	\$ 721,005,529	\$ 74,632,424	\$ 112,033,197	1.56	1.50	0.95
Manufacturing	\$ 14,617,127,932	\$ 517,938,428	\$ 103,732,190	\$ 402,064,049	0.59	1.10	1.81
Trade, transportation, and utilities	\$ 19,012,859,181	\$ 1,263,745,976	\$ 103,351,987	\$ 211,200,315	1.11	0.84	0.73
Wholesale trade	\$ 6,577,305,046	\$ 241,055,859	\$ 21,024,584	\$ 51,397,646	0.61	0.50	0.51
Retail trade	\$ 8,039,235,786	\$ 656,619,056	\$ 55,261,969	\$ 135,312,814	1.36	1.06	1.11
Transportation, warehousing & utilities	\$ 4,396,318,349	\$ 366,071,061	\$ 27,065,434	\$ 24,489,855	1.39	0.95	0.37
Information	\$ 3,982,493,808	\$ 106,677,357	\$ 4,475,398	\$ 25,660,715	0.45	0.17	0.42
Financial activities	\$ 7,258,438,612	\$ 347,970,042	\$ 24,364,526	\$ 66,823,089	0.80	0.52	0.61

Figure A-17. Total MWV Industry Wages and Location Quotients Compared to Oregon 2021 (Continued)

Industry	Total Wages				Location Quotients		
	OR	Marion	Polk	Yamhill	Marion	Polk	Yamhill
Finance and insurance	\$ 5,686,331,373	\$ 260,398,271	\$ 15,044,344	\$ 52,608,943	0.76	0.41	0.61
Real estate and rental and leasing	\$ 1,572,107,239	\$ 87,571,771	\$ 9,320,182	\$ 14,214,146	0.93	0.92	0.59
Professional and business services	\$ 22,171,551,178	\$ 791,289,812	\$ 61,332,707	\$ 129,513,342	0.59	0.43	0.38
Education and health services	\$ 16,948,490,268	\$ 1,502,269,526	\$ 146,342,177	\$ 319,575,540	1.48	1.34	1.24
Health care and social assistance	\$ 15,663,650,578	\$ 1,388,992,852	\$ 142,257,467	\$ 250,351,513	1.48	1.41	1.05
Leisure and hospitality	\$ 4,713,138,051	\$ 267,529,114	\$ 42,073,215	\$ 80,705,624	0.95	1.38	1.13
Arts, entertainment, and recreation	\$ 750,849,982	\$ 27,782,181	\$ 2,727,706	\$ 4,927,943	0.62	0.56	0.43
Accommodation and food services	\$ 3,962,288,069	\$ 239,746,933	\$ 39,345,509	\$ 75,777,681	1.01	1.54	1.26
All Others	\$ 2,962,257,452	\$ 181,635,038	\$ 23,214,721	\$ 38,491,135	1.02	1.21	0.85
Total all government	\$ 18,638,645,979	\$ 2,621,553,056	\$ 283,612,834	\$ 253,218,603			

Source: Oregon Employment Department, special request by covered employment, 2021

Additional Data

The data below refers to the information provided in the [Regional Context chapter](#). Here, we have included additional tables, as well as full source citations, for reference. Each table corresponds to a chart or figure included in Chapter 2.

Figure A-18. Annual Average Wages (2021), Total All Ownerships

Annual Average Wages, 2021	
Oregon	\$66,342
Marion County	\$58,072
Polk County	\$47,175
Yamhill County	\$52,160

Sources:

State of Oregon Employment Department. (2021). Employment and wages: Covered employment and wages (QCEW): Marion County, 2022 annual. Retrieved on August 21, 2023.
<https://www.qualityinfo.org/ewind?rt=0&qcewOwnership=00&qcewIndustrySuperSector=0000&qcewIndustrySector=00&qcewIndustrLvl=0&qcewIndustry=00000&qcewPeriodyear=2022&qcewPeriod=00&qcewArea=4104000047>.

State of Oregon Employment Department. (2021). Employment and wages: Covered employment and wages (QCEW): Oregon, 2022 annual. Retrieved on August 21, 2023.
<https://www.qualityinfo.org/ewind?rt=0&qcewOwnership=00&qcewIndustrySuperSector=0000&qcewIndustrySector=00&qcewIndustrLvl=0&qcewIndustry=00000&qcewPeriodyear=2022&qcewPeriod=00&qcewArea=4101000000>.

State of Oregon Employment Department. (2021). Employment and wages: Covered employment and wages (QCEW): Polk County, 2022 annual. Retrieved on August 21, 2023.
<https://www.qualityinfo.org/ewind?rt=0&qcewOwnership=00&qcewIndustrySuperSector=0000&qcewIndustrySector=&qcewIndustrLvl=0&qcewIndustry=00000&qcewPeriodyear=2022&qcewPeriod=00&qcewArea=4104000053>.

State of Oregon Employment Department. (2021). Employment and wages: Covered employment and wages (QCEW): Yamhill County, 2022 annual. Retrieved on August 21, 2023.
<https://www.qualityinfo.org/ewind?rt=1&qcewOwnership=00&qcewIndustrySuperSector=0000&qcewIndustrySector=&qcewIndustrLvl=0&qcewIndustry=00000&qcewPeriodyear=2022&qcewPeriod=00&qcewArea=4104000071&toggleState=e0010~e5010~e9010~e0010~e5010~e9010>.

Figure A-19. County Annual Average Wage by Industry Compared to Oregon and Region (2021)

Industry	Oregon	Marion County	Polk County	Yamhill County	3-County Region
Total private coverage	\$63,086	\$50,222	\$41,510	\$48,133	\$46,622
Natural resources and mining	\$43,594	\$41,144	\$43,361	\$44,388	\$42,964
Construction	\$70,085	\$64,920	\$57,321	\$57,928	\$60,057
Manufacturing	\$78,432	\$52,391	\$50,924	\$61,281	\$54,865
Trade, transportation, and utilities	\$53,109	\$46,003	\$40,915	\$42,401	\$43,106
Information	\$113,955	\$80,755	\$52,040	\$91,974	\$74,923
Financial Activities	\$86,091	\$65,667	\$54,875	\$63,762	\$61,435
Professional and business services	\$88,684	\$56,436	\$45,465	\$58,896	\$53,599
Education and health services	\$57,504	\$58,021	\$40,504	\$44,746	\$47,757
Leisure and hospitality	\$27,054	\$22,676	\$20,464	\$25,009	\$22,716
All others	\$45,007	\$36,910	\$32,288	\$33,705	\$34,301
Total all government	\$69,636	\$74,415	\$58,926	\$60,550	\$64,630

Source: *State of Oregon Employment Department*. (n.d.). WorkSource Oregon: Employment, wage, and establishment data for Oregon and Marion, Polk, and Yamhill counties, Table 1: Annual average wage by industry, 2021. Prepared by Nicole Ramos of Worksource Oregon. Retrieved on November 11, 2022 from www.qualityinfo.org.

Figure A-20. MWV Change in Share of Families in Poverty By County, Region, and State (2021)

SE: A13002. Poverty Status of Families by Family Type by Presence of Children Under 18 (ACS 5-Year Estimates)										
Polk County			Marion County		Yamhill County		3-County Region		Oregon	
	Total	Percent	Total	Percent	Total	Percent	Total	Percent	Total	Percent
2012-2016	103,204	10.50%	15,019	12.1%	10,034	12.7%	2,003	10.2%	2,982	12.0%
2017-2021	78,185	7.50%	11,655	8.90%	7,690	9.4%	1,817	8.4%	2,148	8.0%
Change, 2016-2021	-24%	-29%	-22%	-26%	-23%	-26%	-9%	-18%	-28%	-33%

Source: *Social Explorer*. (n.d.). American mmCounty Survey 2016-2021 (5-year estimates), Table "SE: A13002. Poverty status of families by family type by presence of children under 18." Retrieved on August 22, 2023, from www.socialexplorer.com.

Figure A-21. MWV Resident Poverty Level, by Race & Ethnicity Compared to Oregon (2016)

<i>Poverty Status in the Past Twelve Months: Residents with Income Below Poverty Line, by Race and Ethnicity: ACS 2016 5-Year Estimates</i>										
	Polk County		Marion County		Yamhill County		3-County Region		Oregon	
ACS Table	Total	Percent	Total	Percent	Total	Percent	Total	Percent	Total	Percent
White Alone (SE: A13001A)	483,778	14.50%	63,901	15.40%	40,834	15.60%	9,691	14.30%	13,376	15.40%
Black or African American Alone (SE: A13001B)	22,906	32.50%	1,138	26.60%	981	30.70%	115	19.60%	42	8.40%
American Indian and Alaskan Native Alone (SE: A13001C)	12,335	28.30%	1,636	30.60%	1,045	32.90%	337	31.50%	254	23.20%
Asian Alone (SE: A13001D)	24,080	15.40%	1,437	16.70%	990	16.80%	322	22%	125	10.10%
Native Hawaiian and Other Pacific Islander Alone (SE: A13001E)	4,311	29.80%	1,090	37.70%	1,029	41.00%	61	24.60%	-	0.00%
Some Other Race Alone (SE: A13001F)	31,571	25.90%	6,548	23.50%	4,944	22.00%	616	29.80%	988	29.70%
Two or More Races (SE: A13001G)	35,242	20.90%	5,832	22.20%	4,588	24.40%	774	20.50%	470	12.70%
Hispanic or Latino (SE:A13001H)	126,554	26.1%	28,174	26.30%	21,586	26.30%	2,282	23.00%	4,306	28.50%

Source: *Social Explorer*. (n.d.). American Community Survey 2012-2016 (5-year estimates), Table "SE: A13001A." to Table "SE: A13001H. Poverty status in the past 12 months." Retrieved on August 22, 2023, from www.socialexplorer.com.

Figure A-22. MWV Residents Below the Poverty Line, by Race & Ethnicity Compared to Oregon (2021)

<i>Poverty Status in the Past Twelve Months: Residents with Income Below Poverty Line, by Race and Ethnicity: ACS 2021 5-Year Estimates</i>										
	Polk County		Marion County		Yamhill County		3-County Region		Oregon	
ACS Table	Total	Percent	Total	Percent	Total	Percent	Total	Percent	Total	Percent
White Alone (SE: A13001A)	376,057	11.30%	46,735	11.50%	28,791	11.40%	8,045	11.30%	9,899	11.60%
Black or African American Alone (SE: A13001B)	18,019	24.20%	1,356	30.70%	1,000	29.30%	203	35.70%	153	34.90%
American Indian and Alaskan Native Alone (SE: A13001C)	9,214	20.90%	980	16.40%	494	15.10%	346	18.90%	140	15.90%
Asian Alone (SE: A13001D)	22,127	12.10%	1,373	13.70%	956	13.40%	319	21.10%	98	7%
Native Hawaiian and Other Pacific Islander Alone (SE: A13001E)	3,318	19.70%	1,123	27.20%	1,092	30.50%	6	1.70%	25	12.70%
Some Other Race Alone (SE: A13001F)	24,857	16%	7,303	17.80%	6,765	21.60%	214	5.70%	324	5.50%
Two or More Races (SE: A13001G)	44,925	14.20%	7,857	16.70%	5,760	16.90%	994	18.90%	1,103	14.00%
Hispanic or Latino (SE:A13001H)	89,722	16%	20,324	16.70%	16,545	17.90%	1,536	12.30%	2,243	13.50%

Source: *Social Explorer*. (n.d.). American Community Survey 2021 5-year estimates, Table “SE: A13001A.” to Table “SE: A13001H. Poverty status in the past 12 months.” Retrieved on August 22, 2023, from www.socialexplorer.com

Figure A-23. MWV Percent Change in Population from 2010 to 2020 Compared to Oregon

	Marion	Polk	Yamhill	3-County District	Oregon
2010	315,335	75,403	99,193	489,931	3,831,074
2020	345,920	87,433	107,722	541,075	4,237,256
Percent Change, 2010-2020	9.7%	16.0%	8.6%	10.4%	10.6%

Source: U.S. Census Bureau. (n.d.). QuickFacts. Retrieved on August 28, 2023 from <https://www.census.gov/quickfacts/fact/table/yamhillcountyoregon,polkcountyoregon,marioncountyoregon,OR/PST045222>.

Figure A-24. MWV Regional Population Estimates, 2021

Marion	Polk	Yamhill	3-County District
344,037	86,347	107,024	537,408

Source: Social Explorer. (n.d.). American Community Survey 2021 (5-year estimates), Table "SE: A00001. Total population." Retrieved on August 21, 2023, from www.socialexplorer.com.

Figure A-25. MWV Educational Attainment for Population 25 Years and Over Compared to Oregon, 2021

	Oregon		Marion County		Polk County		Yamhill County		3-County Region	
Total Population 25 Years and Over	2,971,396	-	228,187	-	56,120	-	72,578	-	356,885	-
Less than High School	252,602	8.5%	32,694	14.3%	4,729	8.4%	7,174	9.9%	44,597	12.5%
High School Diploma	1,677,700	56.5%	139,570	61.2%	34,122	60.8%	44,772	61.7%	218,464	61.2%
Bachelor's Degree or Above	1,041,094	35.0%	55,923	24.5%	17,269	30.8%	20,632	28.4%	93,824	26.3%

Source: *Social Explorer*. (n.d.). American Community Survey 2021 (5-year estimates), Table "SE.B12001. Educational attainment for the population 25 years and over (collapsed version)." Retrieved on August 25, 2023, from www.socialexplorer.com.

Figure A-26. MWV Educational Attainment for Population 25 Years and Older Compared to Oregon, 2021

	Oregon		Marion County		Polk County		Yamhill County		3-County Region	
Total Population 25 Years and Over	2,971,396	-	228,187	-	56,120	-	72,578	-	356,885	-
Less than High School	252,602	8.5%	32,694	14.3%	4,729	8.4%	7,174	9.9%	44,597	12.5%
High School Graduate or More (Includes Equivalency)	2,718,794	91.5%	195,493	85.7%	51,391	91.6%	65,404	90.1%	312,288	87.5%
Some Colleges or More	2,050,711	69.0%	136,904	60.0%	38,520	68.6%	38,520	68.6%	312,288	87.5%
Bachelor's Degree or More	1,041,094	35.0%	55,923	24.5%	17,269	30.8%	20,623	28.4%	93,824	26.3%
Master's Degree or More	396,281	13.3%	19,067	8.4%	6,769	12.1%	7,563	10.4%	33,399	9.4%
Professional Degree or More	120,762	4.1%	4,698	2.1%	1,792	3.2%	2,459	3.4%	8,949	2.5%
Doctorate Degree	52,146	1.8%	1,765	0.8%	960	1.7%	1,051	1.5%	3,776	1.1%

Source: *Social Explorer*. (n.d.). American Community Survey 2021 (5-year estimates), Table "SE.A12002. Highest educational attainment for population 25 years and over." Retrieved on August 25, 2023, from www.socialexplorer.com.

Appendix B:

Full SWOT Analysis

We asked the MWV community to identify opportunities and challenges facing our region. Themes emerged within four categories of analysis: strengths, weaknesses, opportunities, and threats. These SWOT results shaped our identification of strategic priorities and actions for this CEDS. An in-depth analysis of the Mid-Willamette Valley region is detailed below, by element. This section, together with the information contained elsewhere in this report satisfies 3 C.F.R. § 303.7(b)(ii).

Strengths

The Mid-Willamette Valley is home to an array of industries that support economic diversity and resilience. Additionally, the region has several post-secondary educational institutions offering workforce training opportunities and an active entrepreneur network fostered by the Chehalem Valley Innovation Hub.

The strengths of the MWV region are identified below:

- **Diverse Industry Base**
 - Agricultural food production and manufacturing present
 - Growth in several employment sectors
 - Professional, scientific, and technical services
 - Transportation, warehousing, and utilities
 - Construction
 - Leisure and Hospitality
 - Professional business services
 - Easy access to outdoor recreation
 - Wine Industry
 - Presence of high-wage industries
 - Government
 - Construction
 - Health Care and Social Assistance
 - Professional, Scientific, and Technical Services
- **Supportive Business Environment**
 - Workforce training programs
 - Access to higher education via universities and community colleges
 - Chehalem Valley Innovation Hub

- Grant opportunity assistance from the Council of Governments (MWWCOG)
- Strategic Economic Development Corporation (SEDCOR)
- Connectivity
 - Interstate-5 access
 - Broadband access (>80% regionwide)
 - Existing infrastructure for rail, freight, and transit
 - Proximity to employment and population centers: Salem and Portland
- Public Infrastructure and Natural Resources
 - Water availability
 - Hydroelectric power
 - Clean air
 - Rich agricultural land
 - Good jobs-to-homes ratio⁶ in Marion & Yamhill

Weaknesses

A little over one third of all residents in the Mid-Willamette Valley region are cost-burdened (spending 30% or more of their income on housing). Renters fare even worse; 45% of Polk County renters, 47% of Yamhill County renters, and 48% of Marion County renters are cost-burdened. Community organizations cite the lack of available and affordable childcare as a further strain on parents and families. These conditions make residents vulnerable to even greater financial insecurity in the event of a disaster or economic disruption.

The weaknesses of the region are identified below:

- Affordable/Available Childcare and Housing
 - Cost of Living
 - Lack of affordable housing for individuals and families
 - Cost-burdened households
 - Lack of available and affordable childcare
 - Higher than state average wage-dependency ratio⁷
 - Low jobs-to-home ratio⁸ (Polk)
- Collaborative Workforce Readiness
 - Competition instead of coordination between workforce training programs
 - Low diversity of workforce training or apprenticeship programs

⁶ An estimate of jobs to household balance (total employment divided by total occupied housing units). Indicates population needing to commute outside of area for work.

⁷ Wage-dependent ratio measures dependent/no-income/welfare individuals who cannot work divided by total population

⁸ Jobs-to-homes ratio estimates the employment to housing ratio or jobs to household balance (total employment divided by total occupied housing units). Indicates population needing to commute out for work.

- Lack of awareness of existing training programs and challenging application processes
- Rural Connectivity and Infrastructure
 - Poor regional transportation options for smaller communities
 - High use rates of single-occupancy with high-emission gas vehicles creating stress on roads
- Regional Economic Development Strategies
 - Limited regional collaboration and partnership
 - Lack of shared vision across the region
 - County has more power over consistency and buy-in for collaboration
 - Lack of capacity within municipal governments to respond to new ideas
 - Challenging state regulations that make responding to current needs (e.g. new workforce training curriculums) time intensive
 - Economic development metrics don't always demonstrate the full picture
 - Duplication of economic development efforts
 - Jurisdictional competition
 - Lack of public/private collaboration
 - No guide to the development of industry within the region

Opportunities

The Mid-Willamette Valley (MWV) contains a diversity of communities, resources, and people. Public/private partnerships and federal funding opportunities exist to expand regional economic resiliency and can be used to help communities address several of the barriers to prosperity identified in the SWOT analysis.

The opportunities of the MWV are identified below:

- Community Economic Resiliency
 - Decrease the regional ratio of vulnerable housing
 - Decrease Marion County rates of health insurance
 - Increase access to the diverse population base
 - Decrease hazard risk in the region
- Regional Industry Collaboration
 - Potential for integration of agricultural production and processing
 - Increases in employment in several local industry sectors
 - Private initiative for community development
- Strengthen Economic Resources
 - Large reserves of natural resources and raw materials
 - Access to Pacific Rim trade markets
 - Access to I-5 corridor

Specialized Industry Training in Oregon

A.R.E Manufacturing is a small machinist business that has operated in **Newberg, Oregon** for over 40 years. As a small company in an industry dominated by large corporations, the company has struggled to find skilled machinist employees within the region. To address this challenge, the company reached out to local community colleges for potential apprenticeships. However, it was difficult to spark interest in college students who had already begun their careers, so the company connected with a local high school to give youth an opportunity to learn about machining. This partnership created *Tiger Manufacturing*, a student-run machine shop fully functioning out of Newberg High School.



Despite concerns about profitability, *Tiger Manufacturing* has been self-sustaining and profitable since its inception while paying students an hourly rate. The program has been successful in obtaining grants, while the community has provided support through new machinery that can be used by students. **Tiger Manufacturing is an example of how specialized industry training in high school can provide profits for a business and support the next generation of machinists.** A.R.E. Manufacturing hopes the program can encourage the rest of the region's businesses to take pro-active measures, strengthening the local workforce and economy alike.

A.R.E.
MANUFACTURING, INC.

Threats

The Mid-Willamette Valley faces several threats to business continuity that include demographic shifts, aging infrastructure, natural hazard risk, land use regulations, and staffing/funding capacity constraints. All of which contribute to the lack of regional agility in responding to economic or community development needs.

The key threats of the MWV region are identified below:

- Demographic shifts
 - Loss of 20-40-year-old age groups due to out-migration
 - Urban-rural divide
- Connectivity and Workforce Training
 - Lack of regional public transportation and commuting transportation for people who live and work in the county
 - Funding constraints of public education and development of new curriculum
- Natural Hazard Risk
 - High FEMA risk in Marion County
 - Low hospital bed capacity per capita
 - Risk of Cascadia Subduction Zone earthquake and wildfires
- Business Development Barriers
 - Grant timelines/opportunities increase competition
 - Lack of available industrial land
 - Challenging to become “shovel ready” with a lengthy and costly approvals process
 - Wetland mitigation bank is nearing capacity in some parts of the region
 - Lack of institutional capacity to respond quickly to economic development needs

Appendix C:

Economic Resilience

This section summarizes and details signals of economic resilience in Marion, Polk, and Yamhill counties based on a 2022 undertaking to examine economic resilience in the region. The first part of this Appendix provides a summary of stronger and weaker signals of resilience for the three-county region and each county. The second part of the Appendix includes full data profiles for each county that provide information about signals of resilience across eight dimensions.

Introduction

As Oregon communities continue to grapple with the pandemic, devastating fire seasons, growing wealth disparities, and other threats to economic stability, the need to bolster economic resilience has become increasingly clear. In preparation for the Mid-Willamette Valley Council of Government's update of the region's Comprehensive Economic Development Strategy (CEDS), we present a baseline economic resilience assessment that can be used to understand, track, and improve economic resilience.

Resilience is the ability to anticipate, withstand, and bounce back from any type of shock or disruption. Shocks can include nature-based events (fires, floods, droughts, etc.) and the impacts of a changing climate, but also human-caused economic disruptions such as the closure of a region's large employer, the decline of an important industry, changes in the workforce, and population shifts. Economic resilience determines how quickly a community can recover following a disruption and how prepared a community is to withstand or avoid potential economic threats. By assessing several factors that contribute to economic resilience, we can better understand how to direct resources to help build resilience in our communities.

The University of Oregon's Institute for Policy Research & Engagement (IPRE) has developed a holistic and accessible framework for tracking economic resilience. The framework consists of eight questions that are answered using quantitative data measured against predefined scales of resilience strength. While there are a range of other in-depth methods for measuring economic resilience, this framework recognizes the limited capacity of community development staff. It does not require advanced statistical analysis and is intended to be user-friendly and easy enough to execute frequently. Using a consistent method to evaluate economic resilience in each county

helps Economic Development Districts compare indicators over time and identify ways to strengthen the entire region.

In the following sections, we summarize factors that are stronger or weaker indicators of economic resilience in the three-county region and each county. Then, we present the detailed eight-question framework and data reports for each county.

Three-County Region Summary

Region: Strong Signals of Resilience

Population Growth and Forecast

Between 2010 and 2020 the Mid-Willamette Valley region grew. Polk County experienced the fastest growth in the region at 16%. Dallas, Independence, and Monmouth will experience the most growth, with growth rates at rates at or above 2% annually until 2045.

Yamhill and Marion County grew at 9% and 9.7% respectively, while Oregon as a whole grew by 11%. Marion, the most populous county, will experience the most growth inside the urban growth boundaries (UGBs). Yamhill County is also expected to experience the most growth inside city boundaries, particularly in those cities closer to the Portland metro area. Population growth in all three counties is attributed to net in-migration and high birth rates of Hispanic and Latino populations.

Despite the growth, age demographics in all three counties are shifting having a potential negative impact on workforce availability. Yamhill County is losing 25- to 29-year-olds but gaining population in the 65 and over age range. Marion County is losing 39- to 49-year-olds and gaining people over the age of 65 quickly.

Projected Growing Sectors

Several sectors in the Mid-Valley Region (Marion, Polk, and Yamhill) are projected to experience strong sector growth. The top three fastest growing sectors are all projected to experience growth above the state average of 16% between 2020 and 2030. In the Mid-Willamette Valley, Leisure and Hospitality are projected to grow at a rate of 43%, making it the fastest growing sector by far, although these jobs typically pay less than the county average. Transportation, Warehousing, Utilities, and Professional and Business Services are projected to grow at a rate of 25% and 24% respectively. Strong economic growth is a positive signal for economic resilience.

Region: Weaker Resilience Signals

Cost of Living

Based on cost-of-living estimates and housing costs, residents of the Mid-Willamette Valley region may struggle to make ends meet. Using the MIT [Living Wage](#) Calculator, local average wages were assessed to understand the difference between what residents earn on average to what they would need to earn to live comfortably. We found that Oregon's average wage is 70.6% of the estimated living wage. Marion County performs the best with its average wages at 69% of the MIT Living Wage Calculator. Yamhill and Polk come in at 52% and 56% respectively, which is significantly worse than the overall living wage in Oregon.

Additionally, one in three residents in the Mid-Willamette Valley region are cost-burdened (spending 30% or more of their income on housing). Renters fare even worse: 45% of Polk County renters, 47% of Yamhill renters, and 48% of Marion County renters are cost-burdened. Together, these indicators signal that many residents are impacted by a high cost of living. This condition makes residents vulnerable to even greater financial insecurity in the event of a disaster or economic disruption.

Marion County Summary

Marion County is located in the Willamette Valley and is a leader in agricultural production. The county houses the state capital. Government is the largest sector by employment in the county, followed by health care and social assistance. The median age is 36.9 years old, lower than the state's median age of 39.5 years old, and the county's population is expected to grow steadily in the short and long term, almost exclusively within cities. Overall educational attainment levels are lower in Marion County compared to the state and other neighboring counties.

Stronger Signals of Resilience

Growth Sectors

From 2011-2021, Marion County added jobs in Transportation, Warehousing, Utilities, and Construction to its economy. These jobs pay at or above the county average annual wage. The construction sector, which pays 116% of the county's average annual wage, added 5,692 jobs from 2011-2021. In the Mid-Valley Region (which contains Marion County), strong employment growth (25% or higher) is projected for leisure and hospitality; transportation, warehousing, and utilities; and professional business services by 2030. This strong employment growth, including some sectors that pay better than the county average, signals positive growth prospects for the county.

Weaker Signals of Resilience

Age Dependency

Marion County's age dependency ratio of 67.4 is slightly higher than the state's (62.2). The dependency ratio is the number of dependents in a population (under 18 and over 65) divided by the number of working-age (18-64) people, multiplied by 100. A high age dependency ratio indicates there is more pressure on the working population in an economy to take care of younger and older residents.

Commuting & Living Patterns

In Marion County, 54% of workers live in the county and 45% live outside the county. This is similar to the pattern in Polk and Yamhill Counties. Interestingly, in Marion County, 87% of commuters use an automobile, slightly higher than the Polk and Yamhill County. Only about 5% of residents arrive at work using some other means of transportation. In the event of a road disruption, residents will need to find alternative

ways to arrive at work. The fact that so few use non-car transportation currently and that almost half live outside the county suggests that it may be difficult for businesses to continue if a disruption prevents road travel. FEMA rates hazard risk in Marion County as “relatively high,” so a natural hazard could likely disrupt road safety and make it difficult for commuters to drive.

Educational Attainment

Only 24% of residents in Marion County have a bachelor’s degree or higher (statewide, 34% of residents have attained at least a bachelor’s degree). Marion County also has a lower rate of master’s, professional school, and doctorate degrees. Furthermore, 14.8% of Marion County residents have less than a high school education – a higher rate than in Polk or Yamhill Counties. Since educational attainment strongly correlates with upward economic mobility, Marion County is at risk of a workforce and industry skill mismatch.

Polk County Summary

Polk County is located in the Willamette Valley and is a major center for wine. Polk County is home to Western Oregon University in Monmouth, a major employer for the county. From 2010 to 2020, Polk County had a growth rate of 16%, growing much faster than the state as a whole. Polk County's largest sector by employment is government, with Health Care and Social Assistance coming in at a distant second. The population has a median age of 37 which is slightly lower than the state average.

Stronger Signals of Resilience

Housing Quality

Polk County has a relatively low percentage of vulnerable housing stock. Only 7.6% of Polk County's housing is mobile homes (mobile homes are more vulnerable to natural hazards than other homes, meaning that if a natural disaster were to strike, these homes and their residents are more likely to be negatively impacted) and over 95% of all homes have complete plumbing and kitchens. This indicates that homes are more likely to be built to withstand natural hazards and severe weather events, meaning that residents may overall be less negatively affected by such disruptions.

Health Insurance Coverage

Fewer Polk County residents are uninsured compared to the state: 5.6% in the county versus 6.6% across the state. High rates of health insurance coverage suggest that more residents can cover their health care expenses, freeing up scarce public health resources to serve those most in need.

Weaker Signals of Resilience

Age Dependency

The age dependency ratio in Polk County is 68, higher than the state ratio of 62.2. The age dependency ratio is the number of dependents in an area (younger and older populations) divided by the number of working-age adults. It demonstrates how much economic pressure is on working-age residents to support dependents. Numbers closer to 100 indicate greater pressure on working-age residents (because there are more dependents to support per working-age adult). In Polk County, the relatively high age dependency ratio suggests that working-age residents must dedicate more resources and energy towards care, meaning less flexibility and ability to withstand both financial and environmental disruptions.

Commuting and Living Patterns

A majority of people who are employed in Polk County do not live in the county: 57% of workers in Polk County live outside the county. Almost half of the people commute into the county to work, and even more commute out of the county to work elsewhere. Additionally, commuters rely primarily on cars for their transportation – fewer than 5% of commuters use some mode other than a car. In the event of a disruption that makes it difficult to drive, residents will need to find alternative ways to arrive at work. The fact that so few use non-car transportation currently and that so many workers live outside the county suggests that it may be difficult for businesses to continue if a disruption prevents road transportation.

Yamhill County Summary

Yamhill County is located in the Willamette Valley between the Portland metro area and Salem. The county's median age is 38.6, near the state average of 39.5. Yamhill's strong population growth is forecasted to continue in the short and long term. The largest sector by employment in Yamhill County is manufacturing and all three of the county's fastest growing sectors pay above the county's average annual wage. Over 80% of residents have broadband access, a stronger metric than in many of the neighboring counties.

Stronger Signals of Resilience

Fastest Growing Sectors

In Yamhill County, wages are particularly strong in the Professional, Scientific, and Technical Services sector which boasts 153% of the county's average wage. Another fast-growing sector is Construction. Construction wages are 116.9% of the county's average. This is a positive indicator of growth and opportunity for residents.

Health Insurance Coverage

Yamhill County residents have comparable rates of uninsured residents to the state, 6% and 6.6% respectively. Overall, this rate is fairly low and a positive sign. High rates of health insurance coverage suggest that more residents can cover their health care expenses, freeing up scarce public health resources to serve those most in need.

Weaker Signals of Resilience

Housing Quality

Yamhill County has a total housing stock of 39,504 units, just over 10% of which are mobile homes. Mobile homes are more vulnerable to natural hazards than other homes, meaning that if a natural disaster were to strike, these homes and their residents are more likely to be negatively impacted. Additionally, a higher-than-average percentage of the housing stock in Yamhill County has incomplete plumbing and kitchen facilities compared to neighboring counties, indicating some shortcomings in affordable housing.

Eight-Question Framework and Data Reports

Our economic resilience assessment framework asks eight questions to evaluate economic resilience at the county level. To answer the questions, we use a combination of the Census, Oregon Employment Department, and other publicly available data sets to highlight resilience strengths and weaknesses. By answering these questions, communities can identify where vulnerabilities lie and take steps to address these impediments to resilience.

Measuring resilience is complex and depends on a variety of inputs. Each of the eight questions in this framework investigates a different facet of economic resilience. We use distinctive characteristics of the state, county, and local communities to signal how well a region is prepared to withstand disruption.

Achieving economic resilience takes time and relies on coordination across agencies and communities. Data trends, over time, can demonstrate the impacts of policies and programs that are intended to improve resilience, helping to indicate areas that may require more attention and resources.

The following sections detail the eight key questions for gauging resilience and present data reports for each county from the 2022 study.

Eight Questions: What Indicates Resilience?

1	Does the economy have diverse and well-paid jobs?	Diversified economies are more resilient. <ul style="list-style-type: none"> + A distribution of jobs in higher-wage industries indicates greater economic resilience - A concentration of jobs in a single industry indicates less economic resilience
2	What is the projected future of major employment sectors in the region and nationally?	Sectors that are less subject to volatility are more resilient. <ul style="list-style-type: none"> + A distribution of employment across sectors that will likely remain stable indicates greater economic resilience - A concentration of employment in sectors that are regulated, taxed, or that rely on natural resources introduces more risk and indicates less economic resilience
3	What is the age breakdown of residents?	A mix of young, working, and older populations is indicative of a more resilient economy. <ul style="list-style-type: none"> + Working age adults that are active in the labor force indicates greater economic resilience - An aging population indicates less economic resilience
4	Do people live and work in the community?	In communities where people live and work, the local economy is more active and independent, and therefore more resilient. <ul style="list-style-type: none"> + People living and working in the same place with access to a mix of housing indicates greater economic resilience - Major commuter flows and limited housing options indicates less economic resilience
5	How has the population shifted in the last decade and what is predicted for the next 30 years?	Growing populations indicate economic opportunities and resilience. <ul style="list-style-type: none"> + Steady and continuous growth indicates greater economic resilience - Sharp inclines and declines in populations indicate less economic resilience
6	Is the built infrastructure able to withstand natural hazards or weather incidents?	Infrastructure that can continue functioning after a major disruption will help a region continue to function normally despite the disruption. <ul style="list-style-type: none"> + Well-built housing and limited risk of disruption from natural hazards indicates greater economic resilience - Less sturdy housing like mobile homes and significant risk of disruption from natural hazards indicates less economic resilience
7	What level of education attainment and earnings are residents reaching?	Residents with advanced or specialized degrees have higher earning potential. Regions that have choices for advanced education (trade schools, community colleges, four-year colleges, and universities) are better positioned to support the training of local residents. <ul style="list-style-type: none"> + Higher percentage of residents with advanced or specialized degrees indicates greater economic resilience - Lower percentage of residents with advanced or specialized degrees indicates less economic resilience
8	Do residents have access to health and wellness facilities?	Communities with health and wellness facilities are more resilient than communities that lack these facilities. People with health insurance contribute to a more resilient economy by reserving scarce public health resources for those most in need. <ul style="list-style-type: none"> + Populations that are mostly insured and mostly located near health care facilities indicates greater economic resilience - Populations that have lower insurance rates and that are located farther from health care facilities indicates less economic resilience

An Overview of Economic Resilience in the Mid-Willamette Valley Region (Marion, Polk, and Yamhill Counties)

After gathering data to help answer each of the eight questions, we provide some high level findings that apply to both the entire region and each county individually. For full details on each of the eight questions for each of the three counties, refer to the County Profiles at the end of this document.

Mid-Willamette Valley Overview

All three counties in the Mid-Willamette Valley share some similar resilience characteristics. In this section, we detail common stronger and weaker signals of resilience that apply to counties. We then provide commentary on stronger and weaker signals that are more specific to each county.

Stronger Signals of Resilience

Population Growth and Forecast. Between 2010 and 2020 the Mid-Willamette Valley region grew rapidly. Polk County, the fastest growing county in the region, grew by 16%. For comparison, between the same time, the state of Oregon grew by 11%. Yamhill and Marion County also grew fairly rapidly but lower than the state's rate, at 9% and 9.7% respectively. All three counties are forecasted to grow in the short and long term. Marion, the most populace county, will experience most of its growth inside the UGBs with growth outside UGBs declining in the near future. Yamhill County is also expected to experience most growth in its UGBs, particularly those closer to the Portland metro area, with populations outside of UGBs already in decline. Polk County will experience the most growth in Dallas, Independence, and Monmouth, whose UGBs are expected to grow at rates at or above 2% annually until 2045. Compared to the other two counties, Polk County is likely to have the more growth outside its UGBs. Population growth in all three counties is attributed to net in-migration and high birthrates of Hispanic and Latino populations.

Despite overall growth, all three counties are losing key age groups due to out-migration. Yamhill County is losing 25–29-year-olds but gaining college aged, middle aged, and elderly populations. Polk County is losing 25-34 years-olds but gaining upper middle aged populations. Marion County is losing 39-49 year-olds but gaining people over the age of 65 quickly. While the loss of these family-aged groups would be alarming in many places, the Mid-Willamette Valley is growing and diversifying so rapidly that these are not net-losses.

Projected Growing Sectors. Several sectors in the Mid-Valley Region (Marion, Polk, Yamhill, and Linn Counties) are projected to experience strong growth. All of the top three fastest growing sectors are projected to experience growth above the state average of 16% between 2020 and

2030. In the Mid-Valley, leisure and hospitality is projected to grow at a rate of 43% making it the fastest growing sector by far, although these jobs typically pay lower than the county average. Transportation, warehousing, and utilities and professional and business services are projected to grow at a rate of 25% and 24% respectively. Strong economic growth is a positive signal for economic resilience.

Weaker Signals of Resilience

Cost of Living. Based on cost-of-living estimates and housing costs, residents of the Mid-Willamette Valley region may struggle to make ends meet. We compared average wages in the region to the MIT Living Wage Calculator to understand the difference between what residents earn on average and what they would need to earn to live comfortably. We found that average wages do not reach even 70% of what the MIT Living Wage Calculator determines would be a living wage in each county (for comparison, Oregon's average wage is 70.6% of the estimated living wage). Marion County preforms the best with its average wages being 69% of the MIT Living Wage Calculator. Yamhill and Polk are in a weaker position, coming in at 52% and 56% of the MIT Living Wage Calculator respectively. Additionally, a little over one third of all residents in the Mid-Willamette Valley region are cost-burdened (spending 30% or more of their income on housing). Renters fare even worse: 45% of Polk County renters, 47% of Yamhill County renters, and 48% of Marion County renters are cost burdened. Together, these indicators signal that many residents are impacted by a high cost of living. This condition makes residents vulnerable to even greater financial insecurity in the event of a disaster or economic disruption.

Marion County

Marion County is located in the Willamette Valley and is a leader in agricultural production. The county houses the state capital of Salem. Government is the largest sector by employment in the county, followed by health care and social assistance. The median age is 36.9, lower than the state's median age of 39.5, and the county's population is expected to grow steadily in the short and long term, almost exclusively within cities. Overall educational attainment levels are lower in Marion County compared to the state and other neighboring counties.

Stronger Signals of Resilience

Growth Sectors. From 2011-2021, Marion County added thousands of transportation, warehousing, and utilities and construction jobs to its economy. These jobs pay at or above the county average annual wage. The construction sector, which pays 116% of the county average annual wage, added 5,692 jobs from 2011-2021. In the Mid-Valley Region (which contains Marion County), strong growth in employment (25% or higher) is projected for leisure and hospitality; transportation, warehousing, and utilities; and professional business services by 2030. This strong employment growth, including some sectors that pay better than the county average, signals positive growth prospects for the county.

Weaker Signals of Resilience

Age Dependency. Marion County's age dependency ratio of 67.4 is slightly higher than the state's (62.2). The dependency ratio is the number of dependents in a population (under-18 and over-65) divided by the number of working-age (18-64) people, multiplied by 100. A high age dependency ratio indicates there is more pressure on the working population in an economy to take care of younger and older residents.

Commuting & Living Patterns. In Marion County, 54% of workers live in the county and 45% live outside the county. This is similar to the pattern in Polk and Yamhill Counties. What stands out in Marion County is the modes of transportation that people use to get to work: 87% of commuters use an automobile, slightly higher than the Polk and Yamhill County. Only about 5% of residents arrive at work using some other means of transportation. In the event of a disruption that makes it difficult to drive, residents will need to find alternative ways to arrive at work. The fact that so few use non-car transportation currently and that almost half live outside the county suggests that it may be difficult for business to continue if a disruption prevents the workforce from getting to work. FEMA rates hazard risk in Marion County as "relatively high," so it is not unlikely that a natural hazard could disrupt road safety and make it difficult for commuters to drive.

Educational Attainment. Only 24% of residents in Marion County have a bachelor's degree or higher (statewide, 34% of residents have attained at least a bachelor's degree). Marion County also has a lower rate of master's, professional school, and doctorate degrees. Furthermore, 14.8% Marion County residents have less than a high school education – a higher rate than in Polk or Yamhill Counties. Since educational attainment strongly correlates with upward economic mobility, Marion County may have less upward mobility potential compared to neighboring counties.

Polk County

Polk County is located in the Willamette Valley and is a major center for winegrowing. Polk County is home to Western Oregon University in Monmouth and a major employer for the county. From 2010 to 2020, Polk County had a high growth rate of 16%, growing much faster than the state as a whole. Polk County's largest sector by employment is government, with health care and social assistance coming in at a distant second. The county has a median age of 37 which is slightly lower than the state average.

Stronger Signals of Resilience

Housing Quality. Polk County has a relatively low percentage of its housing stock in vulnerable housing types like mobile homes. Only 7.6% of Polk County's housing is mobile homes and over 95% of all homes have complete plumbing and kitchens. This indicates that homes are more likely to be built to withstand natural hazard and severe weather events, meaning that residents may overall be less negatively affected by such disruptions.

Health Insurance Coverage. Fewer Polk County residents are uninsured compared to state: 5.6% in the county versus 6.6% across the state. High rates of health insurance coverage suggests that more residents can cover their own health care expenses, freeing up scarce public health resources to serve those most in need.

Weaker Signals of Resilience

Age Dependency. The age dependency ratio in Polk County is 68, higher than the state's of 62.2. The age dependency ratio is the number of dependents in an area (younger and older populations) divided by the number of working-age adults. It demonstrates how much economic pressure is on working-age residents to support dependents. Numbers closer to 100 indicate greater pressure on working-age residents (because there are more dependents to support per working-age adult). In Polk County, the relatively high age dependency ratio suggests that working-age residents must dedicate more resources and energy towards care, meaning less flexibility and ability to withstand both financial and environmental disruptions.

Commuting and Living Patterns. A majority of people that are employed in Polk County do not live in the county: 57% of workers in Polk County live outside the county. Many people commute into the county to work, and even more commute out of the county to work elsewhere. Additionally, commuters rely primarily on cars for their transportation – fewer than 5% of commuters use some mode other than a car. In the event of a disruption that makes it difficult to drive, residents will need to find alternative ways to arrive at work. The fact that so few use non-car transportation currently and that so many workers live outside the county suggests that it may be difficult for business to continue if a disruption prevents the workforce from getting to work.

Yamhill County

Yamhill County is located in the Willamette Valley between the Portland metro area and Salem. The county's median age of 38.6 is similar to the state's of 39.5, and population is growing steadily. This strong population is forecasted to continue in the short and long term. The largest sector by employment in Yamhill County is manufacturing. All three of the county's fastest growing sectors pay above the county average annual wage. Over 80% of residents have access to broadband, a stronger metric than in many of the neighboring counties.

Stronger Signals of Resilience

Fastest Growing Sectors. All three of the sectors in Yamhill County that experienced the highest employment growth between 2011 and 2021 have average wages above the county average. Wages are particularly strong in the professional, scientific, and technical services sector which has an average wage of 153% of the county's average. The other two fastest growing sectors,

unclassified and construction, have wages that are 111.9% and 116.9% of the county's average respectfully. This is a positive indicator of growth and opportunity for residents.

Health Insurance Coverage. Yamhill County residents have comparable rates of uninsured residents compared to state: 6% in the county versus 6.6% across the state. Overall, this rate is fairly low and a positive sign. High rates of health insurance coverage suggests that more residents can cover their own health care expenses, freeing up scarce public health resources to serve those most in need.

Weaker Signals of Resilience

Housing Quality. Yamhill County has a total housing stock of 39,504 units, just over 10% of which are mobile homes. Mobile homes are more vulnerable to natural hazards than other homes, meaning that if a natural disaster were to strike, these homes and their residents are more likely to be negatively impacted. Additionally, a higher percentage of the housing stock in Yamhill County has incomplete plumbing and kitchen facilities compared to neighboring counties, also indicating some shortcomings in housing quality.

Quick Facts

Population:
347,182
8.1%
of Oregon's
Population

Economic
Diversity Score
(Hachman Index)
12th out of 36
Oregon Counties (.492)

Top 3 Sectors by % of Employment

Average Wages

#1 22.5%

Government
-\$74,415

#2 15.1%

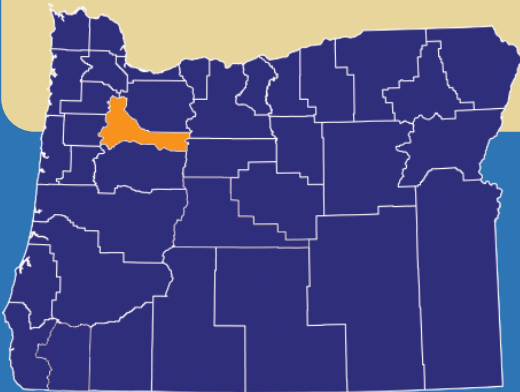
Health Care and
Social Assistance
-\$59,613

#3 11%

Retail Trade
-\$38,127

County Overview

Marion County is located in the Willamette Valley and is a leader in agricultural production. The county houses the state capital of Salem. Government is the largest sector by employment in the county, followed by health care and social assistance. The median age is 36.9, lower than the state's median age of 39.5, and the county's population is expected to grow steadily in the short and long term, almost exclusively within cities. Overall educational attainment levels are lower in Marion County compared to the state and other neighboring counties.



	County	State	US
Median Household Income (2018 \$)	\$58,655	\$65,677	\$67,521
Median Age	36.9	39.5	38.8
% of Residents with at least High School Degree	85.2%	91.1%	89.5%
% of Renters spending 30% or more of income on housing	48%	47.7%	45.5%

Gauging Resilience: Signal Strength Measures

This framework measures the “signal strength” associated with each dataset. Within every question, the datasets with the weaker signals should be noted and further investigated. Communities should aim to have full-power resilience signals for most datasets and may want to concentrate efforts where there is limited signal strength.



Area of concern for a resilient economy. Data signals limited strength.



Area for improvement to support a resilient economy. Data signals opportunity for added resilient measures.



Area contributes to economic resilience for the community. Data signals a resilient position.




Stronger Signals of Resilience

- **Population growth and forecast.** Between 2010 and 2020, Marion County grew 9.7%. The county is expected to grow steadily for the short and long term. Much of this growth is expected to occur in the UGBs.
- **Employment growth and strong wages.** From 2011 to 2021, Marion County added thousands of new well-paying jobs. Two of the three fastest growing sectors over the past decade pay at or above the county average annual wage. Additionally, several sectors in the Mid-Valley Region (Marion, Polk, Yamhill, and Linn Counties) are projected to experience much stronger growth in employment compared to the state average.

Weaker Signals of Resilience



- **Cost of living.** Based on cost-of-living estimates and housing costs, residents in Marion County may experience greater financial insecurity, leaving them less cushion in the event of a disaster or economic disruption.
- **Age dependency.** Marion County has a relatively high age dependency ratio indicating more pressure on working age adults to care for younger and older residents.
- **Commuting and living patterns.** Almost half of workers in the county commute in from outside the county, and most commuters rely on cars for transportation. It may be difficult for business to continue if a disruption prevents the workforce from arriving at work.
- **Educational attainment.** Only 24% of residents have a bachelor's degree, and 14.8% have less than a high school degree—a higher rate than in Polk or Yamhill Counties.

Question 1. Does the economy have diverse and well-paid jobs?

Data to Answer the Question				Results	
Employment data Source: OED 2021	Resilient economies are not predominated by low-wage industries.			 Moderate	
	Average Annual Wages 2021				
	Oregon		\$63,095		
	Marion County		\$55,658		
Source: OED 2021	Sectors with Highest Employment		Wages	% of Total Emp	
	1. Government		\$74,415	22.5%	
	2. Health Care and Social Assistance		\$59,613	14.9%	
	3. Retail Trade		\$38,127	11.0%	
	4. Professional and Business Services		\$56,436	8.9%	
Economic Diversity Source: OED 2021	The Hachman Index is a measure of economic diversity.			 Moderate	
	Marion County Hachman Index Score: 0.492				
	12 th highest of 36 Oregon Counties				
Living Wages Source: OED 2021, MIT Living Wage Calculator	On average, do people earn a living wage?			 Weak	
	MIT Living Wage Calculator (2022) Average Wages of all Sectors (2021) % of MIT LWC				
	Oregon	\$86,341	\$63,095		70.6%
	Marion County	\$81,044	\$55,658		69%




Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Employment data	Of the 3 sectors with the highest employment, how many account for 20% or more of total area employment?	3	1-2	0
Economic Diversity	The Hachman Index is a measure of economic diversity. Using indicators such as gross domestic product (GDP) and employment, the index measures the mix of industries present in a particular region relative to a (well-diversified) reference region.	0-0.33	0.34-0.66	0.67-1.0
Living Wages	MIT produces an estimate of living wages by county. We average the "Required annual income before taxes" to measure whether or not actual wages are meeting the living wage standard using the following measure: Average wage all sectors (from the Oregon Employment Department) as a percentage of the average of all "Required Annual Income Before Taxes" for the county (from MIT living wage) (In other words, what the wage is compared to what it should be : are current wages less, about the same, or higher than what someone would need to live comfortably)	Less than 80%	80% - 100%	More than 100%

Question 2. What is the projected future of major employment sectors in the region and nationally?

Data to Answer the Question			Results
Employment Data	From 2011-2021, Marion County added thousands of transportation, warehousing, and utilities and construction jobs to its economy. Both sectors pay at or above the county average annual wage. This is a positive signal for Marion County’s workers and its economy as a whole.		 Moderate
Source: OED 2021	Fastest Growing Sectors	Avg. Wages (2021) % of County Avg.	
	1. Unclassified	\$48,970 88%	
	2. Transportation, Warehousing, Utilities	\$55,123 99%	
	3. Construction	\$64,920 116.6%	
Employment Growth Projections	Projected Growing Sectors		 Strong
		% Growth	
	1. Leisure and Hospitality	43%	
	2. Transpiration, Warehousing, Utilities	25%	
Source: OED 2022	3. Professional and Business services	24%	




Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Employment Data	Of the 3 fastest growing sectors, how many offer wages above, or equivalent to, average wages in the county?	0	1-2	3
Employment Growth Projections	<p>Of the 3 sectors that have the highest projected employment growth, how many are projected to grow more than 16%?</p> <p>The total projected employment growth for the state between 2020 and 2030 is 16%. We use this as the threshold to determine whether sectors in the county are expected to be above or below this average across all sectors.</p> <p>Projections are only done at a regional level. The Mid-Valley Region includes Marion, Polk, Yamhill, and Linn.</p>	0	1-2	3

Question 3. What is the age breakdown of residents?

Data to Answer the Question		Results
Population characteristics Source: ACS (2020)	The median age of Marion County residents is 36.9, somewhat lower than the state median age of 39.5.	 Strong
Workers over 55 stats Source: Census (2021)	20% of Marion County's total population are over 55 years old and currently working (compared to 23% at the state level).	 Moderate
Age dependency ratio Source: ACS (2020)	The age dependency ratio for Marion County is 67.4, slightly higher than the State's ratio of 62.2.	 Weak



Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Population characteristics	Median age	Over 50	40-50	Under 40
Workers 55 and Over (2020)	Percentage of population that are people over 55 and employed full-time	More than 30%	15%-30%	Less than 15%
Age dependency ratio (2020)	<p>The dependency ratio is the number of dependents in a population (under-18 and over-65) divided by the number of working-age (18-64) people, multiplied by 100.</p> <p>This data point describes the level of pressure on an economy from supporting the portions of the population least likely to be working.</p>	More than 65.0	50.0-65.0	Less than 50.0

Question 4. Do people live and work in the community?

Data to Answer the Question		Results												
Jobs-to-Homes Ratio & Cost Burdened Renters Source: ACS (2020)	Marion County has a total housing stock of 127,505 and a total employment of 156,804. This gives Marion County a jobs-to-homes ratio of 1.23.	 Strong												
	In Marion County, 33.6% of all residents are cost-burdened, very similar to the overall rate for the state of 33.1%. Renters as a group are worse off at both the county and state levels: 48.5% of renters in the county are cost-burdened and 47.7% of renters in the state are cost-burdened.	 Weak												
Commuting & Living Patterns Source: ACS (2020), On the Map (2019) *(Work at home % doesn't include changes from the pandemic)	<table><tr><th>Transportation Modes</th><th>County %</th></tr><tr><td>1. Car, Truck, or van</td><td>87.0%</td></tr><tr><td>2. Public Transit</td><td>1.8%</td></tr><tr><td>3. Walk</td><td>2.7%</td></tr><tr><td>4. Bike</td><td>0.8%</td></tr><tr><td>5. Work at home*</td><td>6.6%</td></tr></table>	Transportation Modes	County %	1. Car, Truck, or van	87.0%	2. Public Transit	1.8%	3. Walk	2.7%	4. Bike	0.8%	5. Work at home*	6.6%	 Weak
	Transportation Modes	County %												
1. Car, Truck, or van	87.0%													
2. Public Transit	1.8%													
3. Walk	2.7%													
4. Bike	0.8%													
5. Work at home*	6.6%													
<table><tr><td>Percentage of population that live and work in the county (2019):</td><td></td></tr><tr><td>Employed in the County:</td><td>164,310</td></tr><tr><td>Employed in the County but living outside:</td><td>75,317 (45.8%)</td></tr><tr><td>Employed and living in the County:</td><td>88,993 (54.2%)</td></tr></table>	Percentage of population that live and work in the county (2019):		Employed in the County:	164,310	Employed in the County but living outside:	75,317 (45.8%)	Employed and living in the County:	88,993 (54.2%)						
Percentage of population that live and work in the county (2019):														
Employed in the County:	164,310													
Employed in the County but living outside:	75,317 (45.8%)													
Employed and living in the County:	88,993 (54.2%)													




Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Jobs-to-homes Ratio & Cost Burdened Renters	Jobs to Homes Ratio	Less than 0.75	More than 1.5	0.75-1.5
	Percentage of renters spending more than 30% of their income on housing (known as cost-burdened)	More than 25%	20-25%	Less than 20%
Commuting & Living Patterns	Percentage of population that commute via walking, bicycling, or public transportation			
	If a major disruption occurs that makes it difficult to drive long distances to work, the population will have to rely on alternative means of transportation.	Less than 5%	5%-10%	More than 10%
	Percentage of population that live and work in the county	Less than 50%	50-75%	More than 75%

Question 5. How has the population shifted in the last decade and what is predicted for the next 30 years?

Data to Answer the Question		Results
Population Growth Rate Source: ACS (2020)	Marion County has a population of 347,182 which accounts for 8.1% of the state's population and has increased by 30,585 people between 2010-2020. This is an increase of 9.7%, higher than the national growth of 7% but lower than the state's growth of 11% over the same time period.	 Strong
Population Forecasts Source: PSU Population Research Center (2021)	Marion County is projected to have steady growth for the short and long term. Much of the population growth is expected to happen inside UGBs for the projected future while areas outside of UGBs will start to lose population in the long term. Most of the net in-migration is people over the age of 65 while the county is actually losing people between the ages of 39-49. Native Hawaiian and Alaska Native has seen the largest population increase by percentage from 2000-2019 and is expected to continue. Hispanic or Latino populations saw the largest population increase by number during that same period and will continue to grow in the short and long term.	 Strong



Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Past population trends	Percentage change in population between 2010 and 2020 (past 10 years).	Less than 0% (Shrinking)	0-5%	More than 5%
Population forecasts	Forecasts for population trends and net migration over the next 30 years relate to the economic drivers that attract and/or retain a growing population.	Declining	No significant change	Growing

Question 6. Is the built infrastructure able to withstand natural hazards or weather incidents?

Data to Answer the Question				Results
Vulnerable housing Source: ACS (2020)	Housing Type/Status Mobile Homes: Homes without complete plumbing: Homes without complete kitchens: Homes without telephone service:	% of total housing stock 8.70% 0.8% 2.4% 1.3%		 Moderate
Hazard risk FEMA NRI (2022)	FEMA Risk County	Score 26.79	Rating Relatively High	 Weak
Broadband access FCC (2017)	Broadband Access Marion County	# of Providers 17	% of Broadband access >80%	 Strong



Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Vulnerable housing	Percentage of housing stock that is classified as mobile homes	More than 10%	5-10%	Less than 5%
	Percentage of homes without complete plumbing	More than 2%	1-2%	Less than 1%
	Percentage of homes without complete kitchens	More than 3%	1-3%	Less than 1%
	Percentage of homes dependent on any single fuel supply	More than 70%	60-70%	Less than 60%
Hazard risk	FEMA produces a National Risk Index that measures the relative risk of a geographic unit based on expected annual loss from hazards, social vulnerability, and community resilience. We use this risk score as a proxy for hazard risk.	Very High or Relatively High	Relatively Moderate	Relatively Low or Very Low
Broadband access	The FCC produced an estimate of "Fixed Broadband Availability" by county. This is measured as the percent of people that have access to download speeds of +25 mbps and upload speeds of +3 mbps. We use this as a proxy for broadband access. 2017 is the most recent year available.	Less than 40%	40-80%	More than 80%

Question 7. What level of educational attainment and earning are residents reaching?

Data to Answer the Question		Results
Educational attainment of populations Source: ACS (2020)	In Marion County, 24% of the population have earned a bachelor's degree or higher, which is lower than in the state overall (34%).	 Weak
Median earning by educational attainment ACS (2020)	People with only a high school degree or equivalent in Marion County have median earnings that are 97% of the state median for those with only a high school degree or equivalent, meaning that this group earn about the same as the state median.	 Moderate

Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Educational Attainment & Earnings	Percentage of population (25 years+) with a bachelor's degree or higher	Less than 25%	25%-35%	More than 35%
	Median earnings of high school graduates (or equivalency) in the county as a percentage of median earnings of high school graduates in state	Less than 75%	75%-105%	More than 105%

Question 8. Do residents have access to health and wellness facilities?

Data to Answer the Question		Results
Insurance Coverage Source: ACS 2020	Just over 8% of Marion County residents are uninsured, a higher rate of uninsurance than the state (6.6%) and a negative indicator for local economic resilience.	 Moderate
ICU & Non-ICU Beds Per Capita Source: OHA 2022	Marion County is located in Region 2 of OHA's Hospital Preparedness Program. Region 2 has a hospital bed per capita of 997.9 persons per bed.	 Weak

Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Insurance Coverage	Percentage of uninsured (non-incarcerated) population	More than 11%	7-11%	Less than 7%
Hospital, urgent care, and pharmacy coverage	Percentage of population within 15 miles of a medical facility (hospital, urgent care, clinic)	Less than 40%	40-70%	More than 70%
	How many ICU and Non-ICU beds per capita does a region have? The State is divided into 9 Hospital Preparedness Program Regions. Marion County is located in Region 2. This region is comprised of Benton, Lincoln, Polk, Marion, Yamhill, and Linn. Hospital beds per capita for the State is 880 persons per bed.	More than 900	800-900	Less than 800

Quick Facts

Population:
84,730

2%
of Oregon's
Population

Economic
Diversity Score
(Hachman Index)

20th out of 36
Oregon Counties (.360)

Top 3 Sectors by % of Employment

Average Wages

#1 23%

Government
-\$58,926

#2 16.8%

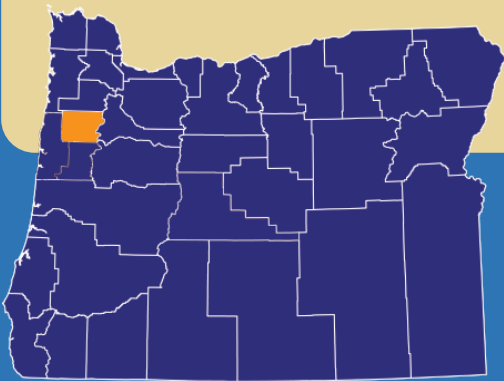
Health Care and
Social Assistance
-\$41,008

#3 9.9%

Manufacturing
-\$50,924

County Overview

Polk County is located in the Willamette Valley and is a major center for winegrowing. Polk County is home to Western Oregon University in Monmouth and a major employer for the county. From 2010 to 2020, Polk County had a high growth rate of 16%, growing much faster than the state as a whole. Polk County’s largest sector by employment is government, with health care and social assistance coming in at a distant second. The county has a median age of 37 which is slightly lower than the state average.



	County	State	US
Median Household Income (2021 \$)	\$52,097	\$65,677	\$67,521
Median Age	37	39.5	38.8
% of Residents with at least High School Degree	91.5%	91.1%	89.5%
% of Renters spending 30% or more of income on housing	45.2%	47.7%	45.5%

Gauging Resilience: Signal Strength Measures

This framework measures the “signal strength” associated with each dataset. Within every question, the datasets with the weaker signals should be noted and further investigated. Communities should aim to have full-power resilience signals for most datasets and may want to concentrate efforts where there is limited signal strength.



Area of concern for a resilient economy. Data signals limited strength.



Area for improvement to support a resilient economy. Data signals opportunity for added resilient measures.



Area contributes to economic resilience for the community. Data signals a resilient position.




Stronger Signals of Resilience

- **Population growth and forecast.** Polk County grew rapidly (16%) from 2010 to 2020 and is expected to continue to have strong growth in the short and long term. Most of this growth is expected to occur inside the county's UGBs.
- **Employment growth.** Several sectors in the Mid-Valley Region (Marion, Polk, Yamhill, and Linn Counties) are projected to experience much stronger growth in employment compared to the state average.
- **Housing quality.** Only 7.6% of Polk County's housing is mobile homes and over 95% of all homes have complete plumbing and kitchens. This indicates that homes are more likely to be built to withstand natural hazard and severe weather events, meaning that residents may overall be less negatively affected by such disruptions.
- **Health insurance coverage.** Only 5.6% of Polk County residents are uninsured. This is lower than the state average and the lowest in the region and generally a positive sign for health care resource allocation.

Weaker Signals of Resilience



- **Cost of living.** Based on cost-of-living estimates and housing costs, residents in Polk County may experience greater financial insecurity, leaving them less cushion in the event of a disaster or economic disruption.
- **Age dependency.** Polk County has a relatively high age dependency ratio indicating more pressure on working age adults to care for younger and older residents.
- **Commuting and living patterns.** More than half of workers in the county commute in from outside the county, and most commuters rely on cars for transportation. It may be difficult for business to continue if a disruption prevents the workforce from arriving at work.

Question 1. Does the economy have diverse and well-paid jobs?

Data to Answer the Question				Results	
Employment data Source: OED 2021	Resilient economies are not predominated by low-wage industries.			 Moderate	
	Average Annual Wages 2021				
	Oregon	\$63,095			
	Polk County	\$45,571			
Source: OED 2021	Sectors with Highest Employment		Wages	% of Total Emp	
	1. Government		\$58,926	23.0%	
	2. Health Care and Social Assistance		\$41,008	16.8%	
	3. Manufacturing (31-33)		\$50,924	9.9%	
	4. Accommodation and Food Services		\$21,199	9.0%	
Economic Diversity Source: OED 2021	The Hachman Index is a measure of economic diversity.			 Moderate	
	Polk County Hachman Index Score: .360				
	20 th highest of 36 Oregon Counties				
Living Wages Source: OED 2021, MIT Living Wage Calculator	On average, do people earn a living wage?			 Weak	
	MIT Living Wage Calculator (2022) Average Wages of all Sectors (2021) % of MIT LWC				
	Oregon	\$86,341	\$63,095		70.6%
	Polk County	\$81,044	\$45,571.		56%




Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Employment data	Of the 3 sectors with the highest employment, how many account for 20% or more of total area employment?	3	1-2	0
Economic Diversity	The Hachman Index is a measure of economic diversity. Using indicators such as gross domestic product (GDP) and employment, the index measures the mix of industries present in a particular region relative to a (well-diversified) reference region.	0-0.33	0.34-0.66	0.67-1.0
Living Wages	MIT produces an estimate of living wages by county. We average the “Required annual income before taxes” to measure whether or not actual wages are meeting the living wage standard using the following measure: Average wage all sectors (from the Oregon Employment Department) as a percentage of the average of all “Required Annual Income Before Taxes” for the county (from MIT living wage) (In other words, what the wage is compared to what it should be : are current wages less, about the same, or higher than what someone would need to live comfortably)	Less than 80%	80% - 100%	More than 100%

Question 2. What is the projected future of major employment sectors in the region and nationally?

Data to Answer the Question			Results
<p>Employment Data</p> <p>Source: OED 2021</p>	<p>Fastest Growing Sectors</p> <p>1. Unclassified</p> <p>2. Arts, Entertainment, and recreation.</p> <p>3. Administrative and Support and</p>	<p>Avg. Wages (2021) % of County Avg.</p> <p>\$59,091 129.7%</p> <p>\$13,639 29.9%</p> <p>\$38,662 84.8%</p>	 Moderate
<p>Employment Growth Projections</p> <p>Source: OED 2022</p>	<p>Projected Growing Sectors</p> <p>1. Leisure and Hospitality</p> <p>2. Transportation, Warehousing, Utilities</p> <p>3. Professional and Business services</p>	<p>% Growth</p> <p>43%</p> <p>25%</p> <p>24%</p>	 Strong





Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Employment Data	Of the 3 fastest growing sectors, how many offer wages above, or equivalent to, average wages in the county?	0	1-2	3
Employment Growth Projections	Of the 3 sectors that have the highest projected employment growth, how many are projected to grow more than 16%?			
	The total projected employment growth for the state between 2020 and 2030 is 16%. We use this as the threshold to determine whether sectors in the county are expected to be above or below this average across all sectors.	0	1-2	3
	Projections are only done at a regional level. The Mid-Valley Region includes Marion, Polk, Yamhill, and Linn.			

Question 3. What is the age breakdown of residents?

Data to Answer the Question		Results
Population characteristics Source: ACS (2020)	The median age of Polk County residents is 37, slightly lower than the state median age of 39.5.	 Strong
Workers over 55 stats Source: Census (2021)	24% of Polk County's total population are over 55 years old and currently working (compared to 23% at the state level).	 Moderate
Age dependency ratio Source: ACS (2020)	The age dependency ratio for Polk County is 67.9, suggesting similar economic pressure compared to the State's ratio of 62.2.	 Weak



Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Population characteristics	Median age	Over 50	40-50	Under 40
Workers 55 and Over (2020)	Percentage of population that are people over 55 and employed full-time	More than 30%	15%-30%	Less than 15%
Age dependency ratio (2020)	<p>The dependency ratio is the number of dependents in a population (under-18 and over-65) divided by the number of working-age (18-64) people, multiplied by 100.</p> <p>This data point describes the level of pressure on an economy from supporting the portions of the population least likely to be working.</p>	More than 65.0	50.0-65.0	Less than 50.0

Question 4. Do people live and work in the community?

Data to Answer the Question		Results												
Jobs-to-Homes Ratio & Cost Burdened Renters Source: ACS (2020)	Polk County has a total housing stock of 32,572 and a total employment of 20,644. This gives Polk County a jobs-to-homes ratio of 0.63.	 Weak												
	In Polk County, 35.8% of all residents are cost-burdened, slightly higher than the overall rate for the state of 33.1%. Renters as a group are worse off at both the county and state levels: 45.2% of renters in the County are cost-burdened and 47.7% of renters in the state are cost-burdened.	 Weak												
Commuting & Living Patterns Source: ACS (2020), On the Map (2019) *(Work at home % doesn't include changes from the pandemic)	<table><tr><th>Transportation Modes</th><th>County %</th></tr><tr><td>1. Car, Truck, or van</td><td>85.7%</td></tr><tr><td>2. Public Transit</td><td>0.7%</td></tr><tr><td>3. Walk</td><td>2.7%</td></tr><tr><td>4. Bike</td><td>0.6%</td></tr><tr><td>5. Work at home*</td><td>10.0%</td></tr></table>	Transportation Modes	County %	1. Car, Truck, or van	85.7%	2. Public Transit	0.7%	3. Walk	2.7%	4. Bike	0.6%	5. Work at home*	10.0%	 Weak
	Transportation Modes	County %												
1. Car, Truck, or van	85.7%													
2. Public Transit	0.7%													
3. Walk	2.7%													
4. Bike	0.6%													
5. Work at home*	10.0%													
	<table><tr><td colspan="2">Percentage of population that live and work in the county (2019):</td></tr><tr><td>Employed in the County:</td><td>19,565</td></tr><tr><td>Employed in the County but living outside:</td><td>11,112 (56.8%)</td></tr><tr><td>Employed and living in the County:</td><td>8,453 (43.2%)</td></tr></table>	Percentage of population that live and work in the county (2019):		Employed in the County:	19,565	Employed in the County but living outside:	11,112 (56.8%)	Employed and living in the County:	8,453 (43.2%)	 Weak				
Percentage of population that live and work in the county (2019):														
Employed in the County:	19,565													
Employed in the County but living outside:	11,112 (56.8%)													
Employed and living in the County:	8,453 (43.2%)													




Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Jobs-to-homes Ratio & Cost Burdened Renters	Jobs to Homes Ratio	Less than 0.75	More than 1.5	0.75-1.5
	Percentage of renters spending more than 30% of their income on housing (known as cost-burdened)	More than 25%	20-25%	Less than 20%
Commuting & Living Patterns	Percentage of population that commute via walking, bicycling, or public transportation			
	If a major disruption occurs that makes it difficult to drive long distances to work, the population will have to rely on alternative means of transportation.	Less than 5%	5%-10%	More than 10%
	Percentage of population that live and work in the county	Less than 50%	50-75%	More than 75%

Question 5. How has the population shifted in the last decade and what is predicted for the next 30 years?

Data to Answer the Question		Results
Population Growth Rate Source: ACS (2020)	Polk County has a population of 84,730 which accounts for 2% of the state's population and has increased by 12,030 people between 2010-2020. This is an increase of 16%, much higher than both the national growth of 7% and the state's growth of 11% over the same time period.	 Strong
Population Forecasts Source: PSU Population Research Center (2021)	Polk County's total population is forecasted to rapidly increase for the projected future. Polk County will more than double by 2070. Most of this growth will happen inside UGBs but growth outside UGBs will continue for the near future. This is mostly due to net in-migration from middle aged and elderly populations. Lots of younger age groups are moving in as well, mostly due to Western Oregon University in Monmouth. But it is of note that many of those younger groups do not stay permanently with 25-34 year olds leaving rapidly.	 Strong



Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Past population trends	Percentage change in population between 2010 and 2020 (past 10 years).	Less than 0% (Shrinking)	0-5%	More than 5%
Population forecasts	Forecasts for population trends and net migration over the next 30 years relate to the economic drivers that attract and/or retain a growing population.	Declining	No significant change	Growing

Question 6. Is the built infrastructure able to withstand natural hazards or weather incidents?

Data to Answer the Question				Results
Vulnerable housing Source: ACS (2020)	Housing Type/Status Mobile Homes: Homes without complete plumbing: Homes without complete kitchens: Homes without telephone service:	% of total housing stock 7.63% 0.4% 2.4% 1.1%		 Strong
Hazard risk FEMA NRI (2022)	FEMA Risk County	Score 12.87	Rating Relatively Low	 Strong
Broadband access FCC (2017)	Broadband Access County	# of Providers 14	% of Broadband access >80%	 Strong



Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Vulnerable housing	Percentage of housing stock that is classified as mobile homes	More than 10%	5-10%	Less than 5%
	Percentage of homes without complete plumbing	More than 2%	1-2%	Less than 1%
	Percentage of homes without complete kitchens	More than 3%	1-3%	Less than 1%
	Percentage of homes dependent on any single fuel supply	More than 70%	60-70%	Less than 60%
Hazard risk	FEMA produces a National Risk Index that measures the relative risk of a geographic unit based on expected annual loss from hazards, social vulnerability, and community resilience. We use this risk score as a proxy for hazard risk.	Very High or Relatively High	Relatively Moderate	Relatively Low or Very Low
Broadband access	The FCC produced an estimate of "Fixed Broadband Availability" by county. This is measured as the percent of people that have access to download speeds of +25 mbps and upload speeds of +3 mbps. We use this as a proxy for broadband access. 2017 is the most recent year available.	Less than 40%	40-80%	More than 80%

Question 7. What level of educational attainment and earning are residents reaching?

Data to Answer the Question		Results
Educational attainment of populations Source: ACS (2020)	In Polk County, 30.51% of the population have earned a bachelor's degree or higher, which is slightly lower than in the state overall (34%).	 Moderate
Median earning by educational attainment ACS (2020)	People with only a high school degree or equivalent in Polk County have median earnings that are 102% of the state median for those with only a high school degree or equivalent, meaning that this group earns slightly more than the state median.	 Moderate

Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Educational Attainment & Earnings	Percentage of population (25 years+) with a bachelor's degree or higher	Less than 25%	25%-35%	More than 35%
	Median earnings of high school graduates (or equivalency) in the county as a percentage of median earnings of high school graduates in state	Less than 75%	75%-105%	More than 105%

Question 8. Do residents have access to health and wellness facilities?

Data to Answer the Question		Results
Insurance Coverage Source: ACS 2020	5.6%% of Polk County residents are uninsured, a slightly lower rate of uninsurance than the state (6.6%) and a positive indicator for local economic resilience.	 Strong
ICU & Non-ICU Beds Per Capita Source: OHA 2022	Polk County is located in Region 2 of OHA's Hospital Preparedness Program. Region 2 has a hospital bed per capita of 997.9 persons per bed.	 Weak

Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Insurance Coverage	Percentage of uninsured (non-incarcerated) population	More than 11%	7-11%	Less than 7%
Hospital, urgent care, and pharmacy coverage	Percentage of population within 15 miles of a medical facility (hospital, urgent care, clinic)	Less than 40%	40-70%	More than 70%
	How many ICU and Non-ICU beds per capita does a region have? The State is divided into 9 Hospital Preparedness Program Regions. Marion County is located in Region 2. This region is comprised of Benton, Lincoln, Polk, Marion, Yamhill, and Linn. Hospital beds per capita for the State is 880 persons per bed.	More than 950	800-900	Less than 800

Quick Facts

Population:
106,087

2%
of Oregon's
Population

Economic
Diversity Score
(Hachman Index)

16th out of 36
Oregon Counties (.404)

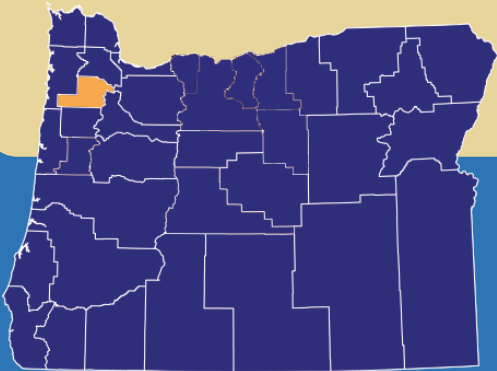
Top 3 Sectors by % of Employment

Average Wages

#1 18% Manufacturing \$61,281	#2 14.6% Health Care and Social Assistance \$47,041	#3 11.5% Government \$60,550
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County Overview

Yamhill County is located in the Willamette Valley between the Portland metro area and Salem. The county's median age of 38.6 is similar to the state's of 39.5, and population is growing steadily. This strong population is forecasted to continue in the short and long term. The largest sector by employment in Yamhill County is manufacturing. All three of the county's fastest growing sectors pay above the county average annual wage. Over 80% of residents have access to broadband, a stronger metric than in many of the neighboring counties.



	County	State	US
Median Household Income (2018 \$)	\$67,296	\$65,677	\$67,521
Median Age	38.6	39.5	38.8
% of Residents with at least High School Degree	89.6%	91.1%	89.5%
% of Renters spending 30% or more of income on housing	47.2%	47.7%	45.5%

Gauging Resilience: Signal Strength Measures

This framework measures the “signal strength” associated with each dataset. Within every question, the datasets with the weaker signals should be noted and further investigated. Communities should aim to have full-power resilience signals for most datasets and may want to concentrate efforts where there is limited signal strength.



Area of concern for a resilient economy. Data signals limited strength.



Area for improvement to support a resilient economy. Data signals opportunity for added resilient measures.



Area contributes to economic resilience for the community. Data signals a resilient position.




Stronger Signals of Resilience

- **Population growth and forecast.** Between 2010 and 2020, Yamhill County grew 9%. The county is expected to grow steadily for the short and long term. Much of this growth is expected to occur in the UGBs.
- **Employment growth and strong wages.** From 2011 to 2021, Yamhill County added thousands of new well-paying jobs. All three of the sectors in Yamhill County that experienced the highest employment growth between 2011 and 2021 have average wages above the county average. Additionally, several sectors in the Mid-Valley Region (Marion, Polk, Yamhill, and Linn Counties) are projected to experience much stronger growth in employment compared to the state average.
- **Health insurance coverage.** Only 6% of Polk County residents are uninsured. This is similar to the state average and generally a positive sign for health care resource allocation.

Weaker Signals of Resilience



- **Cost of living.** Based on cost-of-living estimates and housing costs, residents in Yamhill County may experience greater financial insecurity, leaving them less cushion in the event of a disaster or economic disruption.
- **Housing quality.** Just over 10% of the housing stock in Yamhill County is mobile homes. Mobile homes are more vulnerable to natural hazards than other homes, meaning that if a natural disaster were to strike, these homes and their residents are more likely to be negatively impacted.

Question 1. Does the economy have diverse and well-paid jobs?

Data to Answer the Question				Results
Employment data Source: OED 2021	Resilient economies are not predominated by low-wage industries.			 Strong
	Average Annual Wages 2021			
	Oregon	\$63,095		
	Yamhill County	\$49,563		
Source: OED 2021	Sectors with Highest Employment	Wages	% of Total Emp	
	1. Manufacturing (31-33)	\$61,281	18.0%	
	2. Health Care and Social Assistance	\$48,087	14.6%	
	3. Government	\$60,550	11.5%	
	4. Retail Trade (44-45)	\$35,835	10.4%	
Economic Diversity Source: OED 2021	The Hachman Index is a measure of economic diversity.			 Moderate
Yamhill County Hachman Index Score: .404				
16 th highest of 36 Oregon Counties				
Living Wages Source: OED 2021, MIT Living Wage Calculator	On average, do people earn a living wage?			 Weak
MIT Living Wage Calculator (2022) Average Wages of all Sectors (2021) % of MIT LWC				
Oregon	\$86,341	\$63,095	70.6%	
Yamhill County	\$95,129	\$49,563	52.0%	




Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Employment data	Of the 3 sectors with the highest employment, how many account for 20% or more of total area employment?	3	1-2	0
Economic Diversity	The Hachman Index is a measure of economic diversity. Using indicators such as gross domestic product (GDP) and employment, the index measures the mix of industries present in a particular region relative to a (well-diversified) reference region.	0-0.33	0.34-0.66	0.67-1.0
Living Wages	MIT produces an estimate of living wages by county. We average the "Required annual income before taxes" to measure whether or not actual wages are meeting the living wage standard using the following measure: Average wage all sectors (from the Oregon Employment Department) as a percentage of the average of all "Required Annual Income Before Taxes" for the county (from MIT living wage) (In other words, what the wage is compared to what it should be : are current wages less, about the same, or higher than what someone would need to live comfortably)	Less than 80%	80% - 100%	More than 100%

Question 2. What is the projected future of major employment sectors in the region and nationally?

Data to Answer the Question			Results
Employment Data	From 2011-2021, Yamhill County saw strong economic growth. All three of the fastest growing sectors have average wages above the county average. This is a strong signal for economic growth for Yamhill County.		 Strong
Source: OED 2021	Fastest Growing Sectors	Avg. Wages (2021) % of County Avg.	
	1. Unclassified	\$55,472 111.9%	
	2. Professional, Scientific, and Technical Services	\$75,938 153.2%	
	3. Construction	\$57,928 116.9%	
Employment Growth Projections	Projected Growing Sectors % Growth		 Strong
	1. Leisure and Hospitality	43%	
	2. Transpiration, Warehousing, Utilities	25%	
Source: OED 2022	3. Professional and Business services	24%	




Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Employment Data	Of the 3 fastest growing sectors, how many offer wages above, or equivalent to, average wages in the county?	0	1-2	3
Employment Growth Projections	<p>Of the 3 sectors that have the highest projected employment growth, how many are projected to grow more than 16%?</p> <p>The total projected employment growth for the state between 2020 and 2030 is 16%. We use this as the threshold to determine whether sectors in the county are expected to be above or below this average across all sectors.</p> <p>Projections are only done at a regional level. The Mid-Valley Region includes Marion, Polk, Yamhill, and Linn.</p>	0	1-2	3

Question 3. What is the age breakdown of residents?

Data to Answer the Question		Results
Population characteristics Source: ACS (2020)	The median age of Yamhill County residents is 38.6, slightly younger than the state median age of 39.5.	 Strong
Workers over 55 stats Source: Census (2021)	24% of Yamhill County's total population are over 55 years old and currently working (compared to 23% at the state level).	 Moderate
Age dependency ratio Source: ACS (2020)	The age dependency ratio for Yamhill County is 64.9, very similar to to the State's ratio of 62.2.	 Moderate



Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Population characteristics	Median age	Over 50	40-50	Under 40
Workers 55 and Over (2020)	Percentage of population that are people over 55 and employed full-time	More than 30%	15%-30%	Less than 15%
Age dependency ratio (2020)	<p>The dependency ratio is the number of dependents in a population (under-18 and over-65) divided by the number of working-age (18-64) people, multiplied by 100.</p> <p>This data point describes the level of pressure on an economy from supporting the portions of the population least likely to be working.</p>	More than 65.0	50.0-65.0	Less than 50.0

Question 4. Do people live and work in the community?

Data to Answer the Question		Results												
Jobs-to-Homes Ratio & Cost Burdened Renters Source: ACS (2020)	Yamhill County has a total housing stock of 39,504 and a total employment of 36,660. This gives Yamhill County a jobs-to-homes ratio of 0.93.	 Strong												
	In Yamhill County, 39.7% of all residents are cost-burdened, higher than the overall rate for the state of 33.1%. Renters as a group are worse off at both the county and state levels: 47.2% of renters in the County are cost-burdened and 47.7% of renters in the state are cost-burdened.	 Weak												
Commuting & Living Patterns Source: ACS (2020), On the Map (2019)	<table><thead><tr><th>Transportation Modes</th><th>County %</th></tr></thead><tbody><tr><td>1. Car, Truck, or van</td><td>84.3%</td></tr><tr><td>2. Public Transit</td><td>0.5%</td></tr><tr><td>3. Walk</td><td>5.5%</td></tr><tr><td>4. Bike</td><td>1%</td></tr><tr><td>5. Work at home*</td><td>7.1%</td></tr></tbody></table>	Transportation Modes	County %	1. Car, Truck, or van	84.3%	2. Public Transit	0.5%	3. Walk	5.5%	4. Bike	1%	5. Work at home*	7.1%	 Moderate
	Transportation Modes	County %												
1. Car, Truck, or van	84.3%													
2. Public Transit	0.5%													
3. Walk	5.5%													
4. Bike	1%													
5. Work at home*	7.1%													
*(Work at home % doesn't include changes from the pandemic)	<p>Percentage of population that live and work in the county:</p> <table><tbody><tr><td>Employed in the County:</td><td>36,539</td></tr><tr><td>Employed in the County but living outside:</td><td>16,465 (45%)</td></tr><tr><td>Employed and living in the County:</td><td>20,074 (55%)</td></tr></tbody></table>	Employed in the County:	36,539	Employed in the County but living outside:	16,465 (45%)	Employed and living in the County:	20,074 (55%)							
Employed in the County:	36,539													
Employed in the County but living outside:	16,465 (45%)													
Employed and living in the County:	20,074 (55%)													




Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Jobs-to-homes Ratio & Cost Burdened Renters	Jobs to Homes Ratio	Less than 0.75	More than 1.5	0.75-1.5
	Percentage of renters spending more than 30% of their income on housing (known as cost-burdened)	More than 25%	20-25%	Less than 20%
Commuting & Living Patterns	Percentage of population that commute via walking, bicycling, or public transportation			
	If a major disruption occurs that makes it difficult to drive long distances to work, the population will have to rely on alternative means of transportation.	Less than 5%	5%-10%	More than 10%
	Percentage of population that live and work in the county	Less than 50%	50-75%	More than 75%

Question 5. How has the population shifted in the last decade and what is predicted for the next 30 years?

Data to Answer the Question		Results
Population Growth Rate Source: ACS (2020)	Yamhill County has a population of 106,087 which accounts for 2.5% of the state's population and has increased by 8,529 people between 2010-2020. This is an increase of 8.6%, higher than the national growth of 7% but lower than the state's growth of 11% over the same time period.	 Strong
Population Forecasts Source: PSU Population Research Center (2021)	Yamhill County's total population is forecasted to grow. Most of this growth will occur in the UGBs especially those closer to Portland. Large sub-areas like McMinnville and Newberg are expected to grow at or above 1% annually until 2070. Much of the growth is coming from net in-migration of college aged, middle aged, and elderly populations. 25-29 year old populations are the only age group with a net out-migration. Hispanic or Latino populations are the fastest growing demographic in Yamhill County.	 Strong



Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Past population trends	Percentage change in population between 2010 and 2020 (past 10 years).	Less than 0% (Shrinking)	0-5%	More than 5%
Population forecasts	Forecasts for population trends and net migration over the next 30 years relate to the economic drivers that attract and/or retain a growing population.	Declining	No significant change	Growing

Question 6. Is the built infrastructure able to withstand natural hazards or weather incidents?

Data to Answer the Question				Results
Vulnerable housing Source: ACS (2020)	Housing Type/Status Mobile Homes: Homes without complete plumbing: Homes without complete kitchens: Homes without telephone service:	% of total housing stock 10.1% 1.3% 3.2% 1.0%		 Weak
Hazard risk FEMA NRI (2022)	FEMA Risk County	Score 14.75	Rating Relatively Moderate	 Moderate
Broadband access FCC (2017)	Broadband Access County	# of Providers 12	% of Broadband access >80%	 Strong



Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Vulnerable housing	Percentage of housing stock that is classified as mobile homes	More than 10%	5-10%	Less than 5%
	Percentage of homes without complete plumbing	More than 2%	1-2%	Less than 1%
	Percentage of homes without complete kitchens	More than 3%	1-3%	Less than 1%
	Percentage of homes without telephone service.	More than 2%	1-2%	Less than 1%
Hazard risk	FEMA produces a National Risk Index that measures the relative risk of a geographic unit based on expected annual loss from hazards, social vulnerability, and community resilience. We use this risk score as a proxy for hazard risk.	Very High or Relatively High	Relatively Moderate	Relatively Low or Very Low
Broadband access	The FCC produced an estimate of “Fixed Broadband Availability” by county. This is measured as the percent of people that have access to download speeds of +25 mbps and upload speeds of +3 mbps. We use this as a proxy for broadband access. 2017 is the most recent year available.	Less than 40%	40-80%	More than 80%

Question 7. What level of educational attainment and earning are residents reaching?

Data to Answer the Question		Results
<p>Educational attainment of populations</p> <p>Source: ACS (2020)</p>	<p>In Yamhill County, 27.35% of the population has earned a bachelor's degree or higher, which is lower than in the state overall (34%).</p>	 Moderate
<p>Median earning by educational attainment</p> <p>ACS (2020)</p>	<p>People with only a high school degree or equivalent in Yamhill County have median earnings that are 99% of the state median for those with only a high school degree or equivalent, meaning that this group earn about the same as the state median.</p>	 Moderate

Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Educational Attainment & Earnings	Percentage of population (25 years+) with a bachelor's degree or higher	Less than 25%	25%-35%	More than 35%
	Median earnings of high school graduates (or equivalency) in the county as a percentage of median earnings of high school graduates in state	Less than 75%	75%-105%	More than 105%

Question 8. Do residents have access to health and wellness facilities?

Data to Answer the Question		Results
Insurance Coverage Source: ACS 2020	6% of Yamhill County residents are uninsured, a slightly lower rate of uninsurance than the state (6.6%) and a positive indicator for local economic resilience.	 Strong
ICU & Non-ICU Beds Per Capita Source: OHA 2022	Polk County is located in Region 2 of OHA's Hospital Preparedness Program. Region 2 has a hospital bed per capita of 997.9 persons per bed.	 Weak

Data Definitions & Thresholds		Weak Signal Strength Threshold	Moderate Signal Strength Threshold	Strong Signal Strength Threshold
Insurance Coverage	Percentage of uninsured (non-incarcerated) population	More than 11%	7-11%	Less than 7%
Hospital, urgent care, and pharmacy coverage	Percentage of population within 15 miles of a medical facility (hospital, urgent care, clinic)	Less than 40%	40-70%	More than 70%
	How many ICU and Non-ICU beds per capita does a region have? The State is divided into 9 Hospital Preparedness Program Regions. Marion County is located in Region 2. This region is comprised of Benton, Lincoln, Polk, Marion, Yamhill, and Linn. Hospital beds per capita for the State is 880 persons per bed.	More than 950	800-900	Less than 800

Appendix D:

Definitions

Shared definitions of words and terms used in this document are vital to collaborative and equitable outcomes. These terms and phrases emerged as important through the in-person and virtual conversations with stakeholders in the region as well as research from the University of Oregon. These definitions vary across different resources, including the federal Economic Development Association, but when the following terms or phrases are included in this CEDS' goals, implementation framework, or evaluation framework, it is intended to have the following definitions:

Affordable Housing: Housing that a household can pay for, based on their unique income and circumstances. Typically, the federal government defines housing as affordable when the household is paying no more than 30 percent of their gross income on housing costs.

Age-dependent ratio: measures population that can't work by age (children 0-14 and adults over 65) divided by total population)

ALICE: Asset Limited, Income Constrained, Employed. A shorthand for populations earning above the Federal Poverty Level yet struggling to afford basic expenses: housing, childcare, food, transportation, health care, and a smartphone plan, plus taxes and a small contingency.

Blight: As defined in ORS 457.010, “blighted areas” are those that, because of deterioration, faulty planning, inadequate or improper facilities, deleterious land use or the existence of unsafe structures, or any combination of these factors, are detrimental to the safety, health, or welfare of the community. A blighted area is characterized by the existence of one or more of the following conditions...”⁹ with the recognition of the disproportionate impact this term has on marginalized communities and their community capital contributions to economic development.¹⁰

⁹ ORS 457.010 - Definitions

10 Herrera, Roanel. Latino Small-Town Revitalization as “Blight”: Dec. 2013. [scholarsbank.uoregon.edu](https://scholarsbank.uoregon.edu/xmlui/handle/1794/17507), <https://scholarsbank.uoregon.edu/xmlui/handle/1794/17507>

Capacity: Having sufficient time, people, resources, or capital within public or private agencies that can contribute fairly and consistently towards reaching the objectives of the implementation framework.

Community Capitals: Referring to natural, cultural, human, social, political, financial, and infrastructure-built capitals present in a community.¹¹

Childcare Desert: More than 66% of children 0-5 years old cannot get access to a regulated childcare spot.

Community Infrastructure: The framework of physical facilities needed to support and sustain a community of people to live and work.

Disparity: The difference between the general population and those groups who experience worse outcomes than the general population.

Equity: Awareness and action that attempts to right the historical structures, institutions, and policies that perpetuate racial and ethnic, class, gender, and other identity inequalities.

Essential Jobs (for the region):

- Energy, Renewable energy, Cleantech
- Childcare
- Water and wastewater
- Agriculture and food production
- Critical retail (i.e., grocery stores, hardware stores, mechanics)
- Critical trades (construction workers, electricians, plumbers, etc.)
- Transportation
- Nonprofits and social service organizations
- Education
- Health services
- Aerospace, Aviation

Innovation: That which encourages new ideas, products, and approaches to meet current or emerging demands of consumers.

Jobs-to-homes ratio: an estimate of jobs to household balance (total employment divided by total occupied housing units). Indicates population needs to commute outside of the area for work.

Living Wage: The minimum income standard that, if met, draws a fine line between the financial independence of the working poor and the need to seek out public assistance or suffer consistent and severe housing and food insecurity.

¹¹ Ibid.

Meaningful Community Engagement: The community acts as a shared partner and leader in work and decision advising.

Middle Housing: Duplexes, triplexes, fourplexes, townhomes, and cottage clusters.

Post-secondary Education: Any training or education after high school graduation, including but not limited to trades apprenticeships, bachelor's degrees, and associate degrees.

Public Services: Those services, often publicly provided, which are accessible and available to all. These may include but are not limited to the provision of physical infrastructure, social services, or community assets.

Resiliency: The ability to anticipate, withstand, and bounce back from any type of shock or disruption.

Regionally Significant Sectors:

- Food and Beverage
- Natural Resources/Agriculture
- Manufacturing
- Construction
- Tourism- including Agritourism

Post-secondary education: any career education beyond high school.

Wage-dependent ratio: measures dependent/no-income/welfare individuals who cannot work divided by the total population.

Appendix E: Regional Priority Projects

MWV Priority Project List

During the 2023 CEDS update, the MWVCOG surveyed local economic development organizations and municipalities regarding high-priority regional projects. The respondents prioritized local projects in three ways, best use of limited resources, competitive advantages, and contribution to the overall resiliency of the region. The list is a living document and is updated frequently by the Mid-Willamette Council of Governments. To provide the most up-to-date version, the MWV COG decided not to include it here. It is available upon request. For inquiries please email McRae Carmichael at MCarmichael@mwvcog.org.

Appendix F: Full Action Plan



The following pages contain a summary of the CEDS full Action Plan (both short- and long-term actions), as well as indicators that can be used to monitor progress.

Objectives and action strategies have been assigned to each of the four identified priority areas (goals): Business, Workforce, Community Infrastructure, and Regional Collaboration.

Each action strategy identifies some key stakeholders (some are still TBD), timeframe, priority status, evaluation indicators, and any relevant data sources. To view this framework in spreadsheet form, please refer to the Excel document posted on the Mid-Willamette Valley COG's website with this CEDS.

Short & Long-Term Action Plan



Goal 1: Business

Streamline capital flow to businesses that promote innovation, economic resilience, and sustainability

Objective	Action Strategy	Who	Project Timeframe Short: <5 years Long: >5 years	Priority High, Low	Indicators
Objective 1.1: Support small business growth	Mitigate barriers to accessing capital	ODOE, MWVCOG, Business Oregon, SBDC, SEDCOR, Economic Development Organizations	Short	High	Increase (%) in small business loans approved Living wage/salary
	Redevelop and re-use existing sites in cities to stimulate urban renewal	Business Oregon, Local jurisdictions, MWVCOG, County jurisdictions, DLCD, Chambers, Main Street Organizations, Urban Renewal Districts, Historical preservation organizations, County Building Departments	Long	Low	Infill potential in buildable land inventories
	Improve access to public and private funding; grants and loans in MWV	Business Oregon, USDA, DEQ, ODOE, Ford Family Foundation, Regional Solutions Office, MWVCOG, Local Economic Development Districts	Long	High	Local building code amendments
	Advocate for transparent grant/loan opportunities and increased capacity for grant writing	MWVCOG	Short (annual)	High	Dispersal of urban renewal funding, zoning reform

Objective	Action Strategy	Who	Project Timeframe Short: <5 years Long: >5 years	Priority High, Low	Indicators
Objective 1.2: Prioritize support for business and innovation in regionally significant sectors.	Incentivize new business formation, incubators, and investments	MWVCOG, Business Oregon, SEDCOR, Economic Development Organizations, innovation & incubators, Latino Business Alliance	Short/Medium	High	New state and federal policy supporting subsidies, investments, and incubator programs
	Connect businesses with existing grant/loan programs	MWVCOG, Business Oregon, SEDCOR, Economic Development Organizations	Short	High	Increase (%) in successful grant applications, Amount (\$) of grant funding awarded
	Encourage collaborative community projects & public/private partnerships to increase competitiveness in the region	Chemeketa Community College, Local Chambers of Commerce	Long	Low	Cross-sector partnerships, SBDC clients
	Support innovation resources for businesses and entrepreneurs seeking to adopt innovation practices and develop/launch innovation products including innovation hubs and accelerators	SEDCOR, MWVCOG, Chemeketa, OMEP, Economic Development Organizations, four year universities	Short/Medium	High	Increased enrollment in regional innovation hubs and accelerators. Increased innovation activity in the region
	Work with employers, community leaders, and housing developers to address the need for workforce housing at a variety of salary levels	MWVCOG, Business Oregon, Chemeketa, Innovation partners, county, and local governments	Long	High	TBD
Objective 1.3: Target regionally significant industries for capital and innovation investments.	Natural Resources and Agriculture	SEDCOR, Business Oregon, Oregon Forestry Department	Long	Low	Patents and intellectual property, exports and location quotients, employment
	Manufacturing	Business Oregon	Long	Low	Increase in export volumes or values, employment
	Construction	MASS Timber, Freres, Knife River	Long	High	Building permits, spending, employment rates
	Renewable Energy & Green Technology	DEQ, OED, Economic Development Organizations	Long	High	Consumption and generation, capacity and investments, jobs, subsidies, and projects
	Food and Beverage	SEDCOR, Craft Beverages, Boutique Foods	Long	High	Exports, sales revenue, market share
	Tourism (including Agritourism)	North Marion Tourism Alliance, Travel Oregon, wine industry, DMOs	Long	Low	Hotel occupancy rate, tourism revenue

Objective	Action Strategy	Who	Project Timeframe Short: <5 years Long: >5 years	Priority High, Low	Indicators
Objective 1.4: Invest in business development that promotes resilience, inclusion, sustainability, and technology.	Stimulate business investments that deliberately promote long-term economic resilience	Business Oregon, EarthWise Certification, SEDCOR, MWVCOG, Economic Development Organizations	Long	High	Increased industry demographic and migration pattern shifts for working age populations, employment cluster analysis
	Incentivize inclusive business development through certifications or employment opportunities for underrepresented groups	MWVCOG, SEDCOR, Economic Development Organizations	Short	High	Minority-owned business growth, education, and training opportunities
	Encourage businesses to implement automation, improve production efficiency, and labor-saving practices that improve energy efficiency and environmental sustainability	MWVCOG, SEDCOR, Business Oregon, Chemeketa, OMEP, Willamette Workforce Partnership, philanthropic organizations, Economic Development Organizations	Short	Low	Reduced carbon footprint, water use, % GDP increase
	Develop resources to provide stable, sustainable business assistance programming targeting businesses and entrepreneurs from underrepresented communities	MWVCOG, SEDCOR, Business Oregon, Chemeketa, OMEP, Willamette Workforce Partnership, philanthropic organizations, Economic Development Organizations	Short	High	Number of new underrepresented entrepreneurs
	Integrate technological improvements like automation, digitalization, or AI into existing industries to facilitate growth	Business Oregon, Tech industry leaders, OMEP, SEDCOR, Economic Development Organizations	Long	Low	New patents, digital capacity, new technology jobs



Goal 2: Workforce

Increase awareness of regional workforce training opportunities and facilitate quality community-level support for regional prosperity.

Objective	Action Strategy	Who	Project Timeframe Short: <5 years Long: >5 years	Priority High, Low	Indicators
Objective 2.1: Facilitate educational opportunities to train youth and/or current workforce in regionally significant sectors with future needs	Market regionally significant high need industries and jobs to K-12 families through field trips and educational materials	MWVCOG, Career Technical Education Centers- Willamette Career Academy and CTEC, School Districts, GK Machine, Chambers of Commerce, SEDCOR, WWP	Short	Low	Number of high school trade programs Number of field trips
	Increase awareness and availability of trade and higher education opportunities for minority and non-traditional students	MWVCOG, DevNW, WorkSource and Willamette Workforce Partnership, Chemeketa CC	Long	Low	Enrollment numbers in Chemeketa o Educational Attainment changes by demographics
	Fund and increase availability of hands-on work training: internships and apprenticeship programs for traditional and non-traditional workers	MWVCOG, WorkSource Oregon and Willamette Workforce Partnership, CTECs, BOLI, K-12 Education, Willamette Educational Service District, SEDCOR, Economic Development Organizations	Short	High	Number of new jobs by field Number of training program certificates
	Fund training, marketing, and transition assistance for minority population access to regionally significant jobs	MWVCOG, Career Technical Education Centers- Willamette Career Academy and CTEC, Pathways Program, DevNW,	Annual/short	Low	Number of Annual grants for scholarship programs

Objective	Action Strategy	Who	Project Timeframe Short: <5 years Long: >5 years	Priority High, Low	Indicators
Objective 2.2: Promote living wage and holistic family support for regional workforce.	Promote employer supported information about Oregon Health Care Plan and ACA enrollment to increase access to health services	MWVCOG, OHA, DHS Insurance Brokerages	Short	Low	Health Care enrollment rates
	Increase awareness of existing debt relief and financial literacy programs for working families and households experiencing poverty	MWVCOG, DevNW, WorkSource and Willamette Workforce Partnership, Marion County CDBG	Short	Low	Enrollment in financial literacy
	Work with employers, community leaders, and housing developers to address the need for workforce housing	MWVCOG, DevNW, County and City government, CDBG, SEDCOR, Economic Development Organizations	Short/Medium	High	Increased community awareness. A plan for workforce housing
	Explore case studies and funding opportunities for Universal Basic Income pilots	MWVCOG, DevNW	Long	High	Per capita income Employment rate
	Regularly measure “benefits cliff;” target assistance strategies for disproportionately affected populations	MWVCOG, WWP, CTECs, OED	Long	High	ALICE demographics
Objective 2.3: Address childcare needs and improve access to quality care.	Seek public funding and develop incentives to address the region’s childcare deserts and increase regulated childcare spots	MWVCOG, WWP, Love Inc., Family Building Blocks, Boys and Girls Club, YMCA, Head Start Programs	Short	High	Number of publicly funded childcare spots Share of familial tuition costs
	Incentivize increased employment and recognition through wages and benefits for all regulated, familial care workers through partnerships with social services and financial literacy programs	MWVCOG, Love Inc., Family Building Blocks, YMCA, Head Start Programs, DevNW	Long	Low	Opportunities, grant language
	Create comprehensive records of facilities and spatial data for childcare operations, document barriers for specific populations and neighborhoods	MWVCOG, ODE Early Learning Division	Long	High	Availability of GIS data, up-to-date demographic data
	Promote mixed use buildings with childcare facilities as part of Urban Renewal policies, community engagement, and workshops	MWVCOG, OEDA, Building Codes Divisions, DOE, Urban Renewal Districts, Local Jurisdictions	Short	High	Engagement, code updates, inclusion of "childcare" and "mixed-use" language in comprehensive plans

Objective	Action Strategy	Who	Project Timeframe Short: <5 years Long: >5 years	Priority High, Low	Indicators
Objective 2.4: Improve community, home, and workplace resources to support workforce quality of life.	Protect the natural environment and parks through technical assistance with local and regional park plan updates	MWVCOG, Soil and Water Conservation Districts; OR Parks and Rec; County Parks Departments	Short	High	Number of in-progress park projects
	Promote a sense of community and belonging through diverse cultural festivals, events, and community partnerships	MWVCOG, Oregon Economic Development Association (OEDA), Travel Salem, Travel Oregon, Chambers of Commerce(s), DMOs, Downtown Associations, Main St. orgs.	Short	Low	Number of events per year Funding for programs cultural funding of bi-lingual events
	Continue new investment and promotion of social resources such as mental health services, social services, women's shelters, food banks, senior support, parks, and libraries, especially in communities with populations under 10,000 people	MWVCOG, Silas, OED, OPRD, City, County, and State Parks Department, Travel Salem, School Districts	Long	High	Number Operating Programs Funding/revenue/grants for each field
	Incentivize symbiotic community and local business support with "shop local" days and local business representation in the community	MWVCOG, Chamber of Commerce(s), Main Street Organizations, Business Associations, Economic Development for Cities, SEDCOR, Economic Development Organizations	Short	Low	Small business revenue Number of shop local days



Goal 3: Community Infrastructure

Create and enhance community infrastructure that promotes resilient growth and reduces disparity while driving economic development.

Objective	Action Strategy	Who	Project Timeframe Short: <5 years Long: >5 years	Priority High, Low	Indicators
Objective 3.1: Align all new and existing community infrastructure with Oregon's Natural Hazards Mitigation Planning (NHMP) Resilience Plan (9.2.3).	Water/Wastewater	Local and county agencies, DEQ, DSL, MWVCOG			
	Regularly assess the state of water allocation and storage	DEQ (for water quality), Sewer Authority, city/ county governments, McMinnville Water and Light	Short/ Annual	High	Review project priority list and NHMP lists for completed projects, annually
	Ensure adequate water/wastewater lines to new or existing businesses & commercial properties/lands (LaCreole Node Sewer Extension Project, Old Mill site in Dallas)	Chamber of Commerce, Main Street Orgs, Business Associations, the City and community property owners, Dallas Urban Renewal Agency, Ash Creek Water Control District, Business Oregon, and private property owners.	Short	High	North Santiam Project Schedules and Workflows
	Support investments into already planned or ongoing building projects and updates (e.g. North Santiam Sewer updates; RTSP Project List; EDA Project Solicitation list)	MWVCOG, SKATS, state, county, city, local communities, North Santiam Sewer Authority, Business Oregon, ODOT, DLCD, USDA	Short	High	City's Water Master Plan
	Identify and/or build new water sources & intakes, such as wells or rivers (e.g. City of Woodburn, City of McMinnville)	SEDCOR, Marion County, ODOT, DLCD, City of McMinnville, local communities within Yamhill County, Yamhill County, and the state.	Long	High	Review project priority list for completed projects, annually.

Objective	Action Strategy	Who	Project Timeframe Short: <5 years Long: >5 years	Priority High, Low	Indicators
Objective 3.1: Align all new and existing community infrastructure with Oregon's Natural Hazards Mitigation Planning (NHMP) Resilience Plan (9.2.3). (Continued)	Water/Wastewater (Continued)	Local and county agencies, DEQ, DSL, MWVCOG	TBD	TBD	Periodic review of projects with current NHMP plans
	Increase capacity of water transmission mains (e.g. City of McMinnville and/or its local communities)	Local communities within Yamhill, Yamhill County, State, McMinnville Water and Light.	Short	High	Review project priority list for completed projects, annually.
	Prioritize replacement of outdated water meters (Water Meter Upgrades)	Local communities, county, state.	Short	High	Review project priority list for completed projects, annually.
	Develop and improve flood mitigation and stormwater systems (Old Mill Site Improvement Project, Godsey Road Improvement Project, City of McMinnville 3 rd St. Improvement Project)	City, Urban Renewal Agencies, Ash Creek Water Control District, Business Oregon, and private property owners.	Short	High	Periodic review of projects with current NHMP plans
	Transportation				
	Develop and improve infrastructure supporting multimodal transport and safety, such as roads/streets, intersections, sidewalks and curbs, bike lanes, etc. (Old Mill Site Improvement Project, Godsey Road Improvement Project, City of McMinnville 3 rd St Improvement Project)	Local, state, and federal agencies, ODOT, Travel Salem, Travel Oregon, elected officials, Urban Renewal Agencies, Downtown Associations, Chambers	Short	TBD	Review project priority list for completed projects, annually.
	Replace and improve outdated bridge and rail systems (Godsey Road Improvement Project)	ODOT, local area agreements	Short	High	Review project priority list for completed projects, annually.
	Prepare regional airports to function as emergency recovery/disaster management centers, in case of emergency	Salem Airport, Salem, Marion, and Yamhill County Emergency Management, McMinnville Airport Commission	Long	High	Review project priority list for completed projects, annually.
	Support McMinnville Airport's Private Commercial Taxi Service plan	Salem Airport, Salem, Marion, and Yamhill County Emergency Management, McMinnville Airport Commission	Long	Low	TBD

Objective	Action Strategy	Who	Project Timeframe Short: <5 years Long: >5 years	Priority High, Low	Indicators
Objective 3.1: Align all new and existing community infrastructure with Oregon's Natural Hazards Mitigation Planning (NHMP) Resilience Plan (9.2.3). <i>(Continued)</i>	Energy				ODOT Sustainability Program's Progress Reports; ODOT's Oregon Solar Highway Program; Oregon Dept. of Energy (DOE) – Same for all
	Educate MWV residents on the Oregon Community Solar program	Local and county agencies, utilities, building departments, Energy Trust of Oregon	Long	TBD	
	Explore further incentives to help customers in specific locations adopt beneficial energy efficiency and renewable energy technologies and practices	(Portland General Electric) PGE, Pacific Power, Oregon DOE, local and county agencies, utilities, building departments, Energy Trust of Oregon	Long	TBD	
	Educate MWV residents on Oregon Cash Incentives for Single-Family Homes	PGE, Pacific Power, Oregon DOE, local and county agencies, utilities, building departments, Energy Trust of Oregon	Long	TBD	
	Educate, encourage, and enable residents to realize benefits from clean energy projects that help utilities efficiently operate their systems	PGE, Pacific Power, Oregon DOE, local and county agencies, utilities, building departments, Energy Trust of Oregon	Long	TBD	
	Improve our ability to quantify and value the benefits of energy efficiency and renewable energy to electric and natural gas utility systems	PGE, Pacific Power, Oregon DOE, local and county agencies, utilities, building departments, Energy Trust of Oregon	Long	TBD	
	Broadband				
	Create a plan or checklist that building owners and tenants can use to assess the redundancy of critical business continuity elements, such as distribution of goods and data, remote accessibility and support, and availability of personnel	MWVCOG, Local Emergency Management Agencies, DLCD, developers, banks and credit union's commercial property owners, county housing departments	Long	TBD	Oregon Broadband Map (Business Oregon); Business Oregon - Oregon Broadband Office (cf. Strategic Plan)

Objective	Action Strategy	Who	Project Timeframe Short: <5 years Long: >5 years	Priority High, Low	Indicators
Objective 3.1: Align all new and existing community infrastructure with Oregon's Natural Hazards Mitigation Planning (NHMP) Resilience Plan (9.2.3). <i>(Continued)</i>	Housing				
	Create and partner with organizations who are offering homeownership opportunities through down- payment assistance mechanisms	DevNW (Polk, Marion), Open Doors HousingWorks (Yamhill), Valley Development Initiatives, municipal housing authorities, OHHS, Seeds of Faith Ministry, Unite Oregon, Farmworker Housing Development Corporation (FHDC)	Short	TBD	Develop community partnership inventory and build collaboration through working groups.
	Encourage and incentivize retrofitting and building of multi-unit, middle, and Affordable housing	MWVCOG, local communities, United Way (Affordable Housing - Cottages United), DevNW. Community Home Builders	Long	TBD	Community Building and Neighborhood Revitalization (DevNW);
	Encourage employers to actively engage in workforce housing development close to the workplace to support workers at different income levels	RARE, HUD, Oregon Housing and Community Services (OHCS)	Long	TBD	Review housing inventory annually, form a workgroup, or find housing champions to encourage collaboration on key workforce housing projects
	Provide financing for infrastructure improvements to support housing production	HUD, Oregon Housing and Community Services (OHCS), Business Oregon, state agencies	Long	TBD	Number of federally funded projects and housing production strategies
	Target communities with employment centers and downtowns for housing production strategies	MWCGOG, DLCD	Long	High	Number of federally funded projects and housing production strategies

Objective	Action Strategy	Who	Project Timeframe Short: <5 years Long: >5 years	Priority High, Low	Indicators
Objective 3.1: Align all new and existing community infrastructure with Oregon's Natural Hazards Mitigation Planning (NHMP) Resilience Plan (9.2.3). (Continued)	Industrial Lands				
	Develop a plan for a coordinated, regional approach to industrial lands	MWVCOG, DLCD, SEDCOR, Business Oregon, Regional Solutions, Economic Development Organizations	Short	TBD	Review inventory periodically, regional goals, and collaboration toward building an approach.
	Making available small and large industrial lots/land through new or improved infrastructure	TBD	Long	TBD	Review county inventory. Discuss land use policies.
	Resilience				
	Add physical- and network-level redundancies to protect commerce and public safety in the event of natural or human-caused disasters	MWVCOG, Local Emergency Management Agencies, DLCD, developers, banks and credit union's commercial property owners, county housing departments	Long	TBD	Measure redundancy projects completion year to year.
Objective 3.2: Enhance access to critical services in rural areas in the region.	Encourage building owners and tenants to properly brace and anchor deficient nonstructural elements within their buildings	MWVCOG, Local Emergency Management Agencies, DLCD, developers, banks and credit union's commercial property owners, county housing departments	Short	TBD	Evaluate development projects year to year for resiliency updates.
	Further the deployment of broadband infrastructure (e.g., to schools and rural communities) through funding from NTIA and available grant programs/funding opportunities	MWVCOG, Business Oregon Office of Broadband, internet service providers (e.g., PEAK Internet), local agencies, utilities	Short	TBD	Evaluate development projects year to year for resiliency updates.
	Evaluate transit connectivity between major hubs and smaller cities	MWVCOG; local, state, and federal agencies; ODOT	Short	TBD	RTSP Project List (SKATS)

Objective	Action Strategy	Who	Project Timeframe Short: <5 years Long: >5 years	Priority High, Low	Indicators
Objective 3.3: Adopt a shared implementation framework that identifies regional infrastructure demand.	Add infrastructure & affordable housing experts to the Advisory Group	MWVCOG, Business Oregon, city and county governments, Community Development Financial Institutions Fund (CDFI)	Short	TBD	Evaluate development projects year to year for resiliency updates.
	Consolidate the most current comprehensive lists of regional infrastructure needs and prospective costs	MWVCOG, Business Oregon, city, and county governments	Short/Annual	TBD	Review the list annually and update it.
	Determine affordable ways to implement Oregon's NHMP Resilience Plan across all infrastructure projects	DLCD, local emergency managers	Short	TBD	Increased grant opportunities and matched funds distributed.
	Facilitate matching fund opportunities for federal grants	MWVCOG, MWACT, EDA, Business Oregon	Short	TBD	Increased grant opportunities and matched funds distributed.
	Facilitate a (bi)annual training to create/ update the background necessary for grants	TBD	Short	High	Annual amount of grant procurement
	Put a committee together which can ensure the interconnection of utilities at the regional level	TBD	Short	Low	Committee formation, # of times committee gathers annually, % of interconnected utilities
	Evaluate and share methods of grant and loan procurement efficiency, for example, through a state agency contract, a CDBG model, or a streamlined/simplified application process	MWVCOG	Short	TBD	Increased grant opportunities and funds distributed.
	Regularly update CEDS Regional Resilience Metrics	MWVCOG (or contracted)	Short	TBD	Updated regional metrics each year



Goal 4: Regional Collaboration

Strengthen regional collaboration through coordinated action, efficient funding distribution, and standardized growth measurement to achieve regional prosperity.

Objective	Action Strategy	Who	Project Timeframe Short: <5 years Long: >5 years	Priority High, Low	Indicators
Objective 4.1: Implement strategies that promote equity in both public and private agencies.	Encourage partnership and collaboration on project delivery through designs of policies, programs, and systems	Local regulatory agencies, COG, Business Oregon, Project design team, Regional Solutions Office, EDD Partnerships, Economic Development Organizations, SEDCOR	Short	TBD	Evaluate community satisfaction with the level of engagement through a survey or other means;
	Leverage community-based organizations to lead meaningful community engagement in project identification and implementation to enhance planning processes	Local Governments, Chemeketa, Confederated Tribes of Grand Ronde, Neighborhood Associations, Local Agencies, Community Organizations (such as YMCA)	Short	TBD	Established data collection, analysis, and interpretation efforts and tracked progress
	Develop and maintain progress-tracking metrics adoptable at the regional level	MWVCOG, EDD Partnership Board, SEDCOR, Business Oregon, DLCD	Short (annual)	TBD	Review annually
Objective 4.2: Facilitate information and resource sharing to advocate for community projects and policies.	Trial a shared data platform for regionally tracked metrics and projects to improve data collection and use	MWVCOG, EDD Partnership Board, SEDCOR, Business Oregon, DLCD, DEVNW, Chemeketa, Regional Solutions Team	Short	TBD	Funding amount secured from regional funds and MPOs; % decrease in reliance on grants and external funding sources
	Advocate for funds at the regional level—like Metropolitan Planning Organizations (MPOs) to reduce the need to rely heavily on obtaining grants	MWVACT, MWCOG, EDD Partnership Board	Short	TBD	Increased opportunities and funds distributed.
	Leverage joint applications and resource-sharing to enhance state funding allocation between the COG and EDD	MWVCOG, EDD Partnership Board	Short	TBD	# of new partnerships between public-private organizations and Number of existing partnerships strengthened or expanded; % increase of workforce/community needs addressed

Objective	Action Strategy	Who	Project Timeframe Short: <5 years Long: >5 years	Priority High, Low	Indicators
Objective 4.3: Develop, identify, and improve existing collaborative efforts.	Strengthen targeted private and public partnerships for workforce/community needs.	MWVCOG, SEDCOR, COIC, local Governments, Chemeketa, Confederated Tribes, OMEP, DLCD, Business Oregon, DevNW, Economic Development Organizations	Long	TBD	Number of partnerships between rural-urban; workforce and business)
	Reinforce connections between rural and urban areas to further support entrepreneurial opportunities and market connections	MWVCOG, County SEDCOR, Business Oregon, OR Micro Enterprise Network (OMEN), local governments, Economic Development Organizations, SBDC, Linfield, George Fox	Short	TBD	Increased collaboration between regional entities, and increase in regional projects.
	Allocate existing capacity and resources for coordination between and beyond the three counties	SEDCOR, MWVCOG, local governments, Confederated Tribes of Grand Ronde, Chemeketa, Business Oregon	Short	TBD	Increased collaboration between regional entities, and increase in regional projects.
	Look for opportunities to hire staff that represent the diversity of their counties	MWVCOG	Short	TBD	Evaluate opportunities and hiring demographics annually.
	Increase capacity for coordination between and beyond the three counties	SEDCOR, MWVCOG, local governments, Confederated Tribes of Grand Ronde, Chemeketa, Business Oregon, Economic Development Organizations	Long	High	Presence of staff in the COG to build partnerships and projects operating across regions
	Reduce barriers to creative housing solutions	MWVCOG, County SEDCOR, Business Oregon, state governments, local governments, Community Home Builders	Long	TBD	Evaluate housing solutions annually.
	Undertake a comprehensive regional and district Holistic Needs Assessment (HNA) to benefit all, including regional workforce	County SEDCOR, MWVCOG, local & state government, Chemeketa, Confederated Tribes of Grand Ronde, Biz Oregon	Short	TBD	Evaluate needs assessment periodically.
	Implement the Circuit Rider Model approach to technical assistance	MWVCOG, state/local government, SEDCOR, Business Oregon, DevNW	Long	TBD	Evaluate yearly for increased technical assistance regionally.