



**AD HOC ECONOMIC OPPORTUNITIES ANALYSIS CITIZENS ADVISORY COMMITTEE  
AGENDA**

**July 22, 2020 6:00 PM  
NEWBERG CITY HALL  
414 E FIRST STREET (teleconference meeting)**

Virtual Meeting, details below:

<https://meetings.ringcentral.com/j/1490781432>

Or Telephone:

Dial (for higher quality, dial a number based on your current location):

US: +1(623) 404-9000

+1(646) 357-3664

Meeting ID: 149 078 1432

**I. CALL MEETING TO ORDER**

**II. ROLL CALL**

**III. PUBLIC COMMENTS (5-minute maximum per person – for items not on the agenda)**

**IV. APPROVAL OF MINUTES – May 28, 2020**

**V. ECONOMIC OPPORTUNITIES ANALYSIS**

**1. Introductions 6:00 – 6:10 pm**

**2. Refined Buildable Lands Inventory Results 6:10 – 6:20 pm**

- Do the refined BLI results seem accurate to you? If not, what changes would you like to see?

**3. Employment Forecast and Commercial Land Sufficiency 6:20 – 7:00 pm**

- Do you have questions about how we calculate land sufficiency for commercial land demand?  
Preliminary Buildable Lands Inventory Results

**4. Refined Site Needs and Industrial Land Demand and Sufficiency 7:00 – 7:50 pm**

- Do you have questions about how we are presenting the site needs for industrial land?
- Do you have questions about how we calculate land sufficiency for industrial land demand?

**5. Next Steps 7:50 – 8:00 pm**

- September TAC Meeting to be rescheduled

**VI. ITEMS FROM COMMITTEE MEMBERS**

**VII. ADJOURNMENT**

QUESTIONS? COME TO THE COMMUNITY DEVELOPMENT DEPT. AT 414 E FIRST STREET, OR CALL 503-537-1240

**ACCOMMODATION OF PHYSICAL IMPAIRMENTS:** *In order to accommodate persons with physical impairments, please notify the Community Development Department Office Assistant II of any special physical or language accommodations you may need as far in advance of the meeting as possible as and no later than 48 business hours prior to the meeting. To request these arrangements, please contact the Office Assistant at (503) 537-1240. For TTY services please dial 711.*

**AD HOC ECONOMIC OPPORTUNITIES ANALYSIS CITIZENS ADVISORY COMMITTEE**

**Meeting Minutes**

**May 28, 2020 6:00 PM**

**NEWBERG CITY HALL**

**Meeting held electronically due to COVID-19 pandemic**

*(This is for historical purposes as meetings are permanent retention documents and this will mark this period in our collective history)*

Chair Curt Walker called meeting to order at 6:00pm

**ROLL CALL**

Members Present: Curt Walker, Chair  
Carr Biggerstaff, Vice Chair  
Alvin Elbert  
Rob Hallyburton  
Gene Piros  
Philip Higgins  
Isa Pena  
Allen Routt  
Bob Woodruff

Members Absent: Rick Rogers, excused  
Keith Hansen, excused  
Jim Bush, excused

Staff Present: Doug Rux, Community Development Director  
Brett Musick, Senior Engineer

Consultants: Beth Goodman, ECO Northwest  
Margaret Raimann, ECO Northwest

**PUBLIC COMMENTS:**

None

**CONSENT CALENDAR:**

Approval of the April 23, 2020 EOA CAC meeting minutes

**MOTION:** Member Higgins and Member Elbert moved to approve the April 23, 2020 EOA CAC Meeting Minutes, Motion carried 9/0

**ECONOMIS OPPORTUNITIES ANALYSIS**

Introduction:

Beth started by noting this meeting is to present information to the Committee, and have some discussion about what we are looking at as we begin to develop some analysis. Starting with the preliminary buildable land inventory results, then we'll talk about site suitability for target industries, and have a discussion about competitive advantages and disadvantages for Newberg in the context of a SWOT analysis. Beth noted they are looking for a lot more ideas from the Committee.

## Preliminary Buildable Lands Inventory Results:

Margaret will start with the steps taken so far, she will share the maps and some tables that show the preliminary results. She will talk about site sizes toward the end. First step is to develop a land base, commercial and industrial. The next step is to classify that land in the land base. A lot of the land is already developed or classified as vacant or partially vacant. There is public land and other types that are not included in the vacant classification. The next step is to identify constrained land and not all vacant land is unconstrained, such as wetlands. She noted they also do a verification step in working with aerial imagery and assessor's data. The Assessor's data might be lagging in its reporting or the way parcels are configured and also confirming the aerial imagery. She noted they confirm with city staff on certain parcels, because they can verify with local contacts and what is current. Then the draft results are presented.

Margaret noted the first step is identifying the land base. She pointed out the comprehensive plan designations that are either industrial or commercial land in Newberg. Noting the specialty area district uses, the Riverfront District has commercial, industrial, and mixed use. The Springbrook District has employment, hospitality, neighborhood commercial, and village. Then there are the specific plan areas, commercial, industrial and mixed use. She noted two areas are PQ, public quasi-public comprehensive plan which are included because they have employment type uses on them such as Providence health care and the Airpark.

Margaret talked about the Riverfront area and the changes that are designated in the master plan for this area and changes being made in those designations to make sure they go through.

Member Hallyburton asked a question in regards to the hospital and looking at the aerial. He noted there's a lot of land that is vacant and was wondering whether the hospital has indicated that there is not going to be any more development there and what went into the decision to show that it's developed.

CDD Rux responded that there is some land that is on the south side of the hospital building that could lead to future expansion of the hospital. He said yes hypothetically it could be developed and is for hospital use only. CDD Rux noted he has had conversations with Providence Hospital and they are not looking to sell any land so we considered it to be a developed site. It might have a little bit of expansion of opportunity in the future.

Member Elbert asked about the industrial land around the paper mill site.

CDD Rux noted in the master plan if you look at the land that is to the east of River Street and south of the Bypass that is all comprehensive plan designation industrial. He noted the purple area on the screen by the Bypass and east of River Street will be twenty-one and half acres of mixed employment land, the base will be industrial but there will be some limited commercial. He also noted commercial uses that would be allowed in that mixed employment area so it might end up with a hotel, restaurant, breweries or wineries. But it will have a cap on square footage based on trip generation so that we don't over-subscribe the State highway systems at Hwy 99 and Hwy 219. He noted east of the purple area will continue to stay industrial and to the west of S River Street by the railroad tracks. He noted different areas in the master plan that would stay commercial and high-density residential. He also showed a piece of commercial land they are proposing to change to medium density residential just west of the Bypass.

CDD Rux noted that anyone can go to the city website community development page and review the master plan and view Alternative E to show entire concept of the comp plan designations.

Beth noted their intention with the buildable land inventory is to reflect these changes which will actually have made their way through the City Council and adopted before the end of this project.

Margaret noted the five definitions categorize land. Fully developed, their improved and not likely to develop in 20 years. Vacant lots, ones with no structures or buildings and ones with very little improvement value and partially vacant with room for them to be developed further. Undevelopable lots are those that are less than

3000 square feet in size. Then there is public or exempt lots considered not available. Margaret noted vacant or partially vacant lots are the ones that end up being part of the unconstrained plan supply as we move forward.

Member Hallyburton asked regarding the public ownership or owned by a public entity is it automatically considered undevelopable?

Beth replied yes, unless the public agency has indicated that the land is available for development then there will be a discussion with the owner and that they would be relying on CDD Rux to help through the process.

CDD Rux noted that in the public realm of things Newberg doesn't own a lot of land. The County doesn't own much public land within Newberg. The State of Oregon has some public land which is actually by the railroad tracks off of College Street which is a part of their maintenance and service yard operations.

Member Hallyburton said the only one that he saw that looked significant is west of the golf course zoned mixed-use special plan and that it looked vacant. CDD Rux responded that is Chehalem Glenn Golf Course the first nine holes. The second nine holes are south of Fernwood Road. ODOT owns land for the Bypass.

Member Hallyburton ask about another piece of land that looked vacant.

CDD Rux noted Portland Community College which is off Werth Boulevard and north of Fernwood Road has some expansion land that they can build another building on north of their current building and noted it is publicly owned.

Margaret continued with the map showing the areas vacant and partially vacant. The airport will be separate and they will be doing it differently than the rest because of the restrictions on airport type land.

Margaret briefly went over the constraints and that you can see a lot of overlap on the map because they're water-related layers and they analyze them in GIS, flatten them and deduct them from those areas that are vacant or partially vacant.

Margaret showed both maps together showing the results of the buildable lands inventory. She noted this is what they use to tabulate the data after any changes are made.

Beth noted there is about 147 acres of buildable unconstrained vacant land, about 30 acres of it is in industrial and 105 acres is commercial. There is 81 acres of vacant land in the Springbrook district and they want to do a little more work on refining the dates. Beth noted there is 22 acres in the employment area of the master plan that needs to be moved to light industrial because the types of uses it allows.

Margaret noted other types of land uses that are allowed are commercial, hospitality, hotels, restaurants, meeting facilities, neighborhood, retail, and medical clinics. In the village area, which is where there is also some residential assigned and we need to make sure those two don't overlap.

Beth noted they will take it down somewhat because some of the area is for residential and that will decrease the square footage of the potential building space for commercial. She noted converting this land in the capacity for new employment will be a step that they are taking after they have the buildable land inventory final. Then they will be following the master plans for the Springbrook area, the Riverfront District and Specific plan commercial area.

Margaret noted there is about 55% of buildable land in the Springbrook district.

Member Hallyburton noted it looks like comparing this BLI versus what the city did a few years ago, it showed quite a bit more available land in the Springbrook District. He asked if this is going to come down.

Beth noted the village portion of it will certainly come down and the employment in Springbrook will be moved to industrial.

Member Hallyburton said he has noticed that the industrial buildable land of 30 acres is only about half of the buildable land and was wondering if it had been developed or if there was some other explanation why it was a smaller number.

CDD Rux responded yes, there has been development that has occurred over the last 10 years. He noted when they did the HNA they took a really careful look at the village component, what was going to be residential and what was going to be the employment commercial component of it. We will be looking in the EOA the same way we did in the HNA so we don't have any conflicts or double counting.

Member Higgins asked if the riverfront industrial area is within the city limits. CDD Rux responded it is within the Urban Growth Boundary.

Beth continued with the buildable land inventory noting that Newberg has a little less than 147 acres of buildable land. In looking at land in terms of acres of land by site size and the number of lots. There is 9 acres of land on 34 different sites. These are small sites with opportunity for development. There is 57 acres on five sites between 10 and 20 acres in size which we're working with because the idea of site size and different types of businesses and site needs. For example a corner convenience store on a half-acre will need a portion for the store and the parking lot. That's a specific site need for that kind of business. Another example is a food processor and their site need might be for a 20 acre parcel, it needs to be flat and needs access to an arterial so trucks are not driving through neighborhoods. These are the kind of things that as we will get into discussion about on site needs.

Beth continued with comparison of developed and vacant land. The right side is the vacant and partially vacant land. When they look at the buildable acres in different groupings there's not a whole lot of buildable sites. There are a few bigger sites in the 5 to 10 acres and 10 to 20 acres.

Beth noted they then look at existing developed sites, just to get a sense of what the development pattern has been in Newberg. There is a lot of small sites and a few bigger sites. Medium-sized sites and large sites can be reduced down into smaller sites. It's easier to get a supply of small sites than it is to aggregate a lot of small sites together into one medium size or bigger site.

Beth went on to talk about the Sportsman Airpark noting there is 54 total acres of industrial and public quasi-public designations. Of those acres 29 are vacant that are potentially developable with approximately 17% developed according to the master plan. Some of these areas are only available for lease and that leasable land per FAA restrictions has a certain way for marketing which makes it not appealing to a lot of businesses wanting to locate in Newberg. She showed land that is zoned airport industrial and light industrial that could be public or privately owned. Beth noted looking at the master plan the uses permitted in this area are aviation related. For example you can't have a food processor located here. She noted the airpark needs to be handled in its own category and the uses on that land are limited in a different way other than industrial.

#### Site Suitability for Target Industries:

Beth continued with target industries and that these industries are based on the economic strategy. There is advanced manufacturing, food and beverage processing and below broad target industries are other interests in Newberg. Under general manufacturing there is dental equipment manufacturing in Newberg. Beth noted these are meant to be illustrative types of industries not exclusive to only these industries. She noted we don't have service industries for tourism, or residents on the list, such as corner stores or restaurants which is of interest in Newberg. These will need small size sites and will be added to the list.

Beth added that most of the aviation related industries would probably be located at the airport but not necessarily all of them. For example machine shops preferred not be located at the airports as they have no advantage of being there.

Beth noted one of the target industries that we need to be thinking about is tourism and asked if there were any more.

Member Hallyburton noted he thought that there was already a lot of work that had gone into target industries. Beth responded yes we generally rely on earlier work and this is from the 2016 Economic Development Strategy. It doesn't mean things aren't missing from it, such as tourism which is a good example.

Member Hallyburton suggested healthcare is one of the few growing industries. Beth noted it would easily fall under services to residents so yes it's a good one to call out.

Beth continued with target industries and the site needs. She noted the chart matrix from the State of Oregon: Infrastructure Finance Authority on the characteristics of sites by industries. This is the industrial development competitive matrix which tells us what is competitive for different industries so we will look at food processing.

Beth noted for food processing typical site sizes are between 5 and 25 acres. She noted one of the important things to consider is slope and that any slope greater than 15% is not buildable. When talking about commercial uses and manufacturing uses, the slope is less than 5% in this case for food processing. You're also looking at principal arterials within 30 miles and around Newberg would be Highway 99 and Highway 219.

Beth noted the bottom of the chart defines the difference between preferred and competitive according to Business Oregon. This helps understand what the preferred and competitive attributes for food processing are.

Beth used regional warehouse as an example for the site characteristics are Regional warehousing between 20 and 100 acres or larger, a 5% slope, within 5 miles of an interstate or equivalent and the need for transportation access to not go through neighborhoods.

Beth noted we also work with information about the types of businesses that consider locating to Newberg. This is information CDD Rux has collected over many years in the Willamette Valley which may help understand site needs of businesses and why they haven't located here. Beth said talking to Business Oregon about what size sites businesses are looking for across western Oregon are generally 5 to 20 acre range and some businesses are looking for 50 acres or larger. She will see if Business Oregon can give more specific information to help understand in more detail the needs.

Beth noted the first step is to take the target industries and put them into the set of categories, high tech, food processing, advance manufacturing, general manufacturing, industrial business park, warehouse, and specialized. She said they will be looking at this matrix and making sure they have all the checks in the right places and would be talking more to SEDCOR. She said you then take those same target industries and talk about their site needs. The first one on the chart is advanced manufacturing and items checked are high tech, advanced manufacturing, industrial business park and specialized. This is generally between 5 and 25 acre sites with a slope less than 7%, railroad access is not required, highway access is within 15 miles and special utility needs. Beth noted that they need to separate this out for businesses that need smaller mid-sized sites 5 to 50 acres, then the largest 50 to 100 acres. This all needs to connect with the employment forecast and estimating the number of types of sites and average site size needed. This will represent the site forecast for Newberg.

Member Higgins asked when we are analyzing a company and it needs 5 acres, are we analyzing it for its pre-developed state or actual developed state. Say the difference between a site that already has infrastructure and roads put in and a site that's raw and doesn't have infrastructure or roads. Beth replied, yes, so you have 5 acres and lose some for street improvements, stormwater retention and all the things that make up infrastructure then the net developable usable land is not 5 acres.

Beth noted the percentage of right-of-way in commercial and industrial, for instance street and sidewalks. Industrial right-of-way is between 12% to 20%, commercial right-of-way is between 15% to 25% depending on the area.

CDD Rux following up on Member Higgins question noting when they did the housing needs analysis, they had to take into account how many acres is going to be needed for right-of-ways to serve the residential areas and that they will have a similar methodology dealing with the employment land.

### Discussion: Newberg's Competitive Advantages and Disadvantages

Beth noted part of what we need to consider in the Economic Opportunities Analysis are Newberg's competitive and comparative advantages. Why would a business want to locate into Newberg? What makes Newberg appealing to a business? This discussion is a discussion the SWOT analysis: strengths weaknesses opportunities and threats. We have started with based information out of work that the city staff did back in 2016. So were not starting from scratch but the world has changed since 2016 and we have broken down some strengths and some weaknesses. Strengths are location and the proximity to Portland Metro and access to agricultural land. Transportation access to Highway 99 as well as Highway 219. Utilities, since the work was done on this in 2016 the city staff has done a lot of work on their utility plans and has a better idea what maintenance improvements are expected over the next 20 years. Another strength is that compared to some cities in your region, say Sherwood or Portland, the housing is relatively inexpensive. Housing is a weakness when you look at availability of housing for middle income workers. We will look at the workforce housing consortium and the work that's going on there to understand how that weakness may be addressed. The limited land supply is a weakness and we have heard from SEDCOR that they could locate more businesses in Newberg because it is an appealing place except there is just no land. Transportation is a weakness for distance from I-5 which is about 12 miles.

Member Higgins didn't feel that using the distance to I-5 as a weakness, 12 miles isn't that bad.

CDD Rux responded for example when Amazon wanted to build a new facility within 5 miles of I-5, an organization like that likely is not going to look at Newberg because we are 12 miles away. Some industry sectors now need to be within 20 to 40 miles of an interstate or 10 miles of the state highway, different industries have different needs.

Member Woodruff had a question for CDD Rux, looking at our strength of water quantity it seems like 10 years ago there was a purple pipe program where the wastewater treatment plant was offering reclaimed water and was wondering if that was something that could still be available for industries and be a strength.

CDD Rux responded yes, and as Beth mentioned that we've done a lot of work over the last 5 years. We have updated our Transportation System Plan, our Water Master Plan and our Wastewater Master Plan and we are in the process of updating our Stormwater Plan as well. If we look back when we did this in 2016 for example the Water Master Plan we have well fields across the Willamette River in Marion County and have pipes that go over and under the river. We are now engaged in discussions about water redundancy and looking at what's our water supply for this community for residents and businesses over a 50-75 year period. He noted they had a briefing with City Council on our wastewater and about the purple pipe. When we updated our Wastewater plan, there's a sub-component of that about the purple pipe, so we've broken it off into grids. If you are north of Highway 99, it would go to Otis Springs, it's a non-potable water source. If you are South of Highway 99, then it's going through our purple pipe. Our plant has a capacity to produce reuse water and can double that capacity up to 2 million gallons a day. When you look at where that pipe is now, which actually goes out and feeds into the golf course but goes down Wilsonville Road there are other opportunities in our industrial area that we've looked at and identified a purple pipe going to serve the industry. For example if you have a data center and their need for chillers and coolers, reuse water would be a much more economical way for that business here rather than using the potable water system. Doug noted to answer your question yes, we have looked at all of that.

Beth continued on to opportunities and threats. The opportunities are education, redevelopment, tourism and entrepreneurial business incubator. Beth noted one of the threats we have is the global pandemic and it's hard to talk about right now. When you look at the State forecast of revenues and employment, they're expecting sometime early summer Oregon will hit 21% unemployment as the state opens back up. If it holds true that we find some vaccine or effective treatment for COVID-19, then under that case were expecting employment to return to previous recession levels. Beth noted this is a different recession that we are in right now with different structural problems in our economy and society. The pandemic is a big problem right now and they're trying to figure out how to adjust and have businesses stay alive. Business relocation is one of the threats as Doug mentioned various businesses left Newberg because they couldn't find new sites or buildings to meet their needs. Aging population is a threat because we have baby boomers that are retiring over the next 20 years. We are going to have demand for new workers from growing businesses, but also demand for replacement workers while a lot of baby boomers with the brainpower knowledge and institutional knowledge as they leave the workforce. Global climate change is very much a threat which is outside the city's ability to control.

CDD Rux shared comments received from member Bush who couldn't join the meeting this evening. He mentioned some additional strengths are the Aquatic Center with large swim meets (club, high school and college), water polo and recreational swimming attract athletes, spectators provide demand for food, shopping and lodging. Providence Newberg Medical Center and their new facilities attract professionals and residents. Chehalem Glenn golf Course could become more of a strength with added food and beverage facilities. He mentioned an additional weakness is lack of affordable housing and it's limitation to expanding employment. Regarding opportunities, downtown revitalization is critical to attract people to spend time in Newberg. Lack of revitalization would be considered a weakness. Member Bush's final comment is, what specifically is the threat of an aging population to Newberg's economic opportunities? If industries are expanded they will attract whatever ages come with those opportunities. Competition for housing is a problem regardless of age.

Beth opened up the discussion, why would a business come to Newberg? What would be the barriers of businesses coming to Newberg, framing it in strengths, opportunities, weaknesses and threats?

Member Higgins noted the lack of available land in Newberg is critical. He mentioned there are a lot of lots that are smaller than 5 acres and are hard to develop so not a lot of job creation. Buildable land inventory is crucial and we lack industrial and affordable housing but we have a lot of other things such as quality of life that people want. He noted that now with people working more from home, we're going to see a lot of people moving out to this area. As time goes on people are going to become rooted here and opening new businesses.

Member Hallyburton agrees the hospital is a strength and the revitalization work downtown is a strength. He also noted the need for more commercial and industrial land in Newberg.

Member Routt mentioned he didn't see the Newberg/Dundee Bypass listed as a strength, weakness, opportunity or a threat. He asked where the group thinks the Bypass falls in the matrix.

CDD Rux responded and shared what he has heard. Some downtown businesses find the Bypass as a positive, by getting rid of the big trucks driving through downtown. He also mentioned the downtown plan, doing a road diet making it a more pedestrian-friendly destination place you want to go with your residents or visitors to Newberg. He has also heard some other businesses talk about the Bypass taking traffic out of downtown because it's using the Bypass going to the coast and they no longer go through downtown anymore or stop. This could be considered both a strength and weakness at the same time.

CDD Rux noted Newberg's destination is to go downtown, it has shops, restaurants, dining, wine tasting, breweries and all of those amenities people want locally as well as those coming from the west coast or around the state, you want them to come to Newberg for that tourism.



Member Biggerstaff noted that the source for SWOT is from 2016 and he said we didn't handle the Bypass message very well including the signs. He noted when looking at SWOT you also have George Fox University and Portland Community College. The K through 12 educational system has struggled, they have a high percentage of free lunch to deal with and other issues. We have had a lot of turnover for organizations for example Providence Medical Center, they have a lot of people interested in Newberg, but don't see the school district for example as a plus. We count hospitality and tourism as an opportunity and it is but we suffer with affordable housing which is an issue, and so is the tourism industry and hospitality industry. He feels aside from Amazon he agrees with Member Higgins, the good news is we're not that far from I-5 and the Bypass congestions are not as bad as it used to be. Public transportation has been an issue for a long time and you have a lot of strengths that you could build out under quality of life. We have a very desirable place to live and would want to expand on that.

Member Woodruff noted the bypass messaging is parking. Parking is limited downtown, surveys show there are a lot of parking spots, but a lot of people tend to forget there is the city owned lot on Second Street. So keeping parking as a part of the conversation around transportation is important as well.

Chair Walker noted the lack of available land has been a weakness for Newberg over the years. There have been businesses interested in locating here but there wasn't available land, industrial or commercial for them to build on, and there have been businesses that wanted to expand and couldn't. This is a real weakness, we need to provide land available so that we can attract and grow our business industry. We have things like the Aquatic Center, Providence Newberg Medical and the Golf Course that is a positive to Newberg.

Member Biggerstaff noted having these opportunities for downtown revitalization and in the riverfront are not going to happen unless we have the tax base in our community to help make these renovations or developments happen. We have some unique opportunities, but we need to get the businesses in here to help fund the development of those opportunities and build out our community. He noted we have people that want to live out here and work out here and enjoy the amenities, but we're not going to get them.

Member Piros wasn't sure what to add and is new to the community. He said he moved here for the quality of life piece.

Member Pena also new to the community commented on the diverse population. Newberg is like a hybrid community and has a large aging population but also a large growing diverse population. She noted we need to think about the opportunities that could bring in more services and businesses that accommodate the more diverse population. Also the quality of life services and the difference between big city and a small town feeling.

Member Elbert commented that the Bypass goes through his back yard. He noted that limited land supply is a threat. He visited McMinnville and 20 % of their employment is industrial. Another is a lot of business in manufacturing, Cascade Steel is solid, and they have the aerospace facilities. McMinnville has 200 acres of industrial land available. For example he looked last year to see what was on the market for industrial or commercial lands in Newberg and could only find a piece of property listed which was a 5000 square foot space for lease. Sherwood has 138 acres of commercial land available and 365 acres of industrial land available. He noted businesses in Newberg have no place to grow. Member Elbert also noted that 23.9% of McMinnville residence work in McMinnville because they have the economic base to keep them there. In Newberg out of all the commuters only 11.6% stay in Newberg and work locally because we don't have the economic base to keep them locally. He also mentioned tourism and the wine industry and that it is not a strong economic base to work on. He noted that in Newberg the business Suntron which employed over 100 people and is now closed and Current Electronics which employed over 500 employees is also closed and he feels we are going backwards.

Member Routt asked about a comment mentioned earlier about businesses who had looked into the opportunities in Newberg, but then decided to go a different direction. He asked if there is any other information

as to why they made that decision. He also noted that listed as a strength is the rail service and didn't know if there was a plan to revitalize rail service or if there was something that we were going to do with it and if it really is a strength.

CDD Rux noted Portland Western's rail line several years ago the kids burned down the trestle in Sherwood. They had to reroute the train so they came out of Portland, went down to Albany, went over to Corvallis and back to McMinnville. Newberg was getting about one train a week that was for Ultra-quiet floors. They have since rebuilt the bridge in Sherwood and decided it was more economical for them to go down to Albany, to Corvallis, back up to McMinnville and then to Newberg, then it is to try to climb the grade between Sherwood and Newberg. They also have some additional trestles between Newberg and Sherwood that have weight limitations on them and are old wooden trestles, so they can actually get longer trains going the long route than they can be short trains coming up over the hill.

Member Routt asked Doug if we see a lot of need for rail service needed for businesses, because it seems like a lot goes by truck.

CDD Rux responded a lot goes by truck, it's the raw product coming in and it is cheaper to ship by rail than by truck. It depends on where the finished product is going, if it's going west coast they may choose to go by truck. If the product is going to the east coast it could go by rail. With the volume and the weight of the product that is being distributed, they try to find the most cost-effective transportation carriers in order to get to its final location.

Beth noted we have inexpensive fuel right now. Gasoline comparatively over the next 20 years until costs go up again as they were a decade ago, that may switch whether rail is more viable for shipping.

Beth brought up internet capacity in Newberg and that it might be something to look into more deeply. With more people working from home how is the internet in Newberg.

CDD Rux noted he has done a lot of research on internet service providers in Newberg. For commercial we have fiber that's provided by three different entities in Newberg and seems to be well served. It's the industrial that we don't have well served there is copper line in the industrial area. Companies ask the question who's your internet service provider, is there fiber? We respond no we have old copper T1 line and to bring fiber to you it has a cost.

Beth noted it is not a community-wide problem it's the site specific problem.

CDD Rux responded there is some geographic constraints to it. On the housing side it gets to some cost issues, Comcast and Frontier have some programs but there are some limitations. Will 5G in Newberg ever happen or will we see it over the next 50 years. Articles he has read said no it is the major metropolitan areas that will get 5G.

Member Biggerstaff noted on getting the capacity band width to our locations and that Newberg has a very fragmented internet provider group. He mentioned Doug has worked for a couple years now trying to get critical people to pay attention so that they make the investment to put fiber in the ground and the need to get out to buildings in commercial, industrial and residential areas. There are a lot of neighborhoods that are getting internet through radio transmitters and are limited. Member Biggerstaff also noted until this gets resolved and enough need in demand in the community by businesses that they get enough gigabit-speed for their business it's going to be a real problem to recruit the businesses that want to relocate to Newberg. The internet service providers aren't going to make it a priority to put fiber in to businesses because of the cost.

Beth brought up another question on the pandemic is child care a barrier?

Member Higgins noted he thinks in the pandemic world child care certainly is. He was working with a daycare that was looking at expanding into a building that was going to have 30 or 40 more kids and had a waiting list. Than the pandemic hit and now you cannot have more than 10 kids per facility. Looking at unemployment going down and people going back to work the child care issue is going to have to be resolved.

Beth noted we will work childcare into the document and that her impression was that childcare was a barrier and needed a solution before the pandemic and that it has become desperate now during the pandemic.

Member Elbert noted more people will be working from home. In a manufacturing facility you have to be there to touch it and can't work from home. He feels it's a part of the economy, but not the entire economy and that businesses need to be a lot more flexible with hours and how they handle childcare.

Next Steps:

Beth noted the next meeting is July 7, which they will be looking at employment forecast and discussing more in detail about site needs and deficits of land. What can you do about those deficits?

**ITEMS FROM COMMITTEE MEMBERS**

None

**ADJOURNMENT:**

Chair Walker adjourned meeting at 7:48 pm

**APPROVED BY THE ECONOMIC OPPORTUNITIES ANALYSIS CITIZENS ADVISORY COMMITTEE this July 7, 2020**

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Curt Walker, EOA CAC Chair

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Doug Rux, Recording Secretary

DATE: July 14, 2020  
TO: Newberg EOA Technical and Citizens Advisory Committees  
FROM: Beth Goodman and Margaret Raimann, ECONorthwest  
SUBJECT: Connecting to the Virtual Meeting

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We are using a service called Ring Central Meetings for the July 22, 2020 Newberg EOA TAC and CAC Meetings. It provides advanced conference call options, screen sharing, and video conference options. Please see the meeting agenda for the meeting link and conference line numbers.

## Before the meeting

The service works best and provides the most options and controls if you download and install the app / software. To download in advance, go to <https://www.ringcentral.com/apps/rc-meetings> and download the appropriate version for your computer (it is also available for smart phones/tablets). If you are unable to or prefer not to download the app, you can participate via phone and, if you have access to the internet, view the screenshare in your browser.

## Joining the meeting

There are several ways to connect to the meeting.

- Click the link below for either the TAC or CAC meeting—this will connect you to the screen share. We recommend doing this first.
  - TAC meeting link: <https://meetings.ringcentral.com/j/1483625867>
  - CAC meeting link: <https://meetings.ringcentral.com/j/1490781432>
  - *Note: We will connect the virtual meeting about 10 minutes before the meeting begins, to allow participants time to connect and become familiar with the software.*
- You will land on a page that looks something like this:

Launching...

Please click **Open RingCentral Meetings** if you see the system dialog.

If nothing prompts from browser, [click here](#) to launch the meeting, or [download & run RingCentral Meetings](#).

If you cannot download or run the application, [join from your browser](#).

- 
- If you have already downloaded the software, it should ask if you want to open it in the app (“click here to launch the meeting”), or do so automatically.
  - If you have not downloaded the software, you will have the option to do so when you click the link (“download & run RingCentral Meetings”).
  - If you do not want to download, click "join from your browser" and you will be able to see the screenshare without installing anything.

Please enter your name online when prompted. This helps us know who is in the meeting and who is speaking. You can also update your display name after you join (see last page).

If you install the software, you may be asked if you would like to connect to video (web cam) when you connect to the meeting. You do not need to do this.

Regardless of how you connect to the screenshare, we strongly recommend calling in for audio unless you have a headset that works with your computer. Using a computer mic and speakers produces terrible echoes.

Please enter your "participant ID" from the screenshare on your phone when prompted (after entering the meeting ID) - that connects your phone number to your name on the screenshare and makes it easier to keep track of who's there and who's talking. It also makes it so that the mute button on your screenshare (if you have the app installed) will control your phone audio.

The link and phone number for the meeting will only work once the host starts the meeting. For this meeting, we anticipate starting the meeting service 10 minutes prior to the beginning of the meeting to allow time for people to test their audio and visual connections. If you click the link prior, you will get a message that the host has not started the meeting.

If you have trouble connecting to the meeting once it has started, please email Margaret at [raimann@econw.com](mailto:raimann@econw.com) for assistance.

## During the meeting

Please mute yourself when you are not speaking to cut down on background noise. If necessary, the meeting host can mute individuals or all participants.

If you have installed the app, you will have access to features including:

- Raise Hand: this allows you to indicate that you have a question or wish to speak, without interrupting
- Chat: this allows you to ask the host a question without interrupting or let us know if you are having issues with audio

The images on the following page provide additional information about the controls available to participants. Note that not all of these are applicable to our virtual meeting.

## Participant Controls

Participants have standard controls at the bottom menu bar of the meeting as well as the **Raise Hand** and **Rename** (Windows and Android only) features.

### Desktop

1. **Join Audio/Mute:** Dial in or call via device audio then mute or unmute microphone.
2. **Settings (Audio)**
3. **Start/Stop Video:** Turn video on or off.
4. **Settings (Camera)**
5. **Invite:** Send invitations to participants.
6. **Manage Participants:** View other participants and see more options.
  - a. **Raise Hand:** If you'd like to notify the host that you need their attention, use the Raise Hand feature. The Host will get a notification that you have raised your hand. Click **Participants** to open a list of participants. At the top of the pop-up, you will see Raise Hand. Click **Raise Hand**.
  - b. **Rename:** On Windows at the top of the Participants pop-up, you will also see **Rename**. You can rename yourself by clicking **Rename**.
7. **Share Screen:** Share your screen or, if another person is sharing, send a request to the host to share your screen.
8. **Chat:** Instantly exchange messages with individuals or all meeting participants.
9. **Record:** Send the host a request to record the meeting. Once the host has allowed you to record, you can begin recording the meeting.
10. **Leave Meeting**



# Newberg EOA: TAC / CAC Meetings #3

July 22, 2020

**ECON**Northwest

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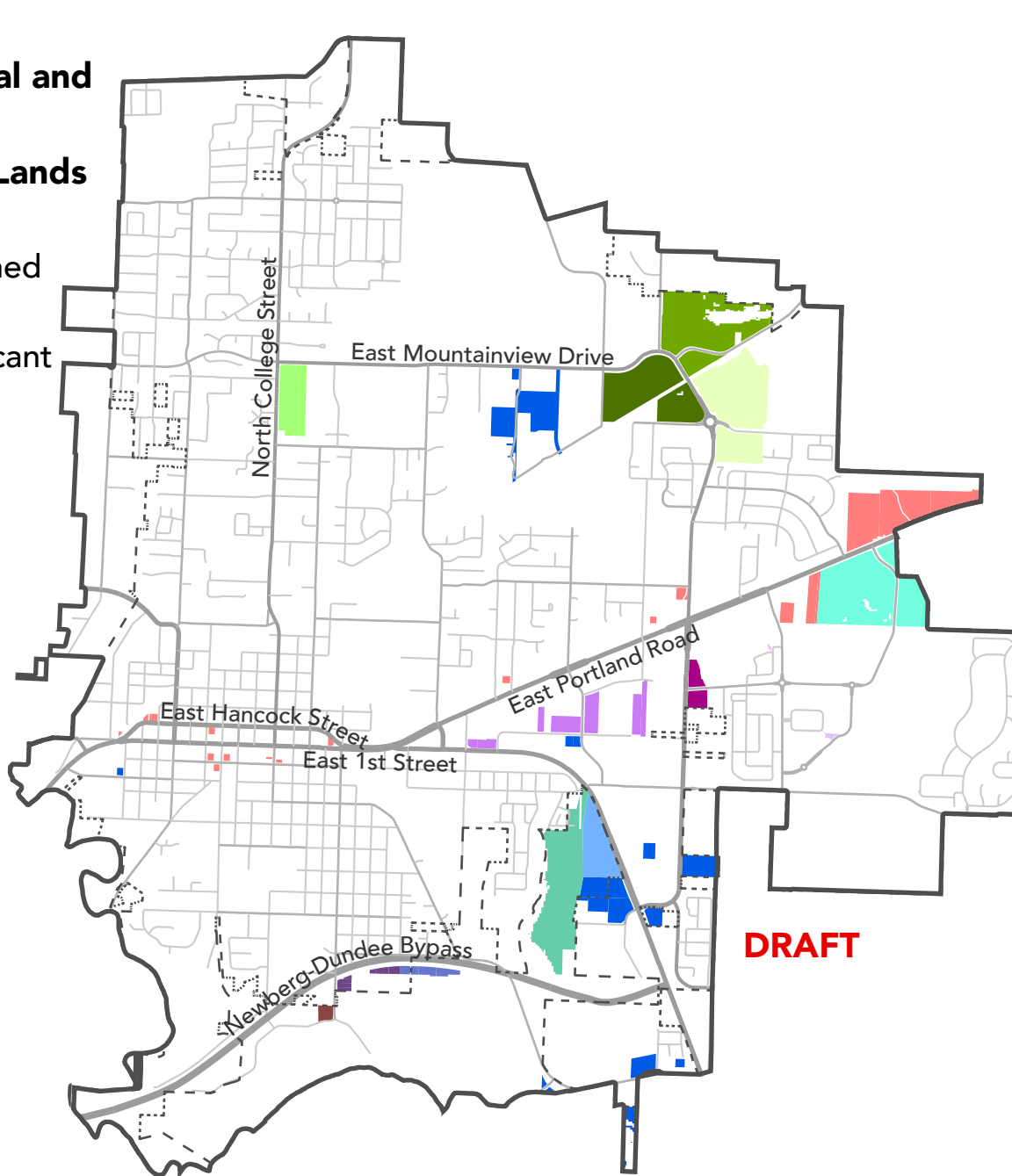
- Introductions
- Refined BLI Results
- Employment Forecast and Commercial Land Sufficiency
- Refined Site Needs
- Industrial Land Demand and Sufficiency



# Refined BLI Results

# Newberg Commercial and Industrial Buildable Lands Inventory

Unconstrained  
Vacant and  
Partially Vacant  
Land



- City Limits
- Urban Growth Boundary
- Comprehensive Plan Designations**
- Industrial
- Commercial
- Mixed Use
- IND (Airpark)
- PQ (Airpark)
- PQ (Hospital)
- Riverfront District**
- Commercial
- Industrial
- Mixed Use
- Springbrook District**
- Employment
- Hospitality
- Neighborhood Comm.
- Village
- Specific Plan**
- Commercial
- Mixed Use

**DRAFT**

Date: July 13 2020  
Source: ECONorthwest; City of Newberg; Yamhill County



# Unconstrained Vacant and Partially Vacant Land

Zone/Plan Designation	Total Buildable Acres	Buildable Acres on Vacant Lots	Buildable Acres on Partially Vacant Lots
<b>Commercial</b>	<b>55</b>	<b>27</b>	<b>28</b>
Commercial	15	6	10
Riverfront District Commercial	1	1	
Specific Plan Commercial	4	4	
Public Quasi-Public (Hospital Site)	8		8
Springbrook District - Hospitality	14	4	10
Springbrook District - Neighborhood Commercial	11	11	
<b>Mixed Use</b>	<b>24</b>	<b>21</b>	<b>4</b>
Mixed Use	10	6	4
Riverfront District Mixed Use	2	2	
Specific Plan Mixed Use	0	0	
Springbrook District - Village	12	12	
<b>Industrial</b>	<b>51</b>	<b>41</b>	<b>10</b>
Industrial	27	20	7
Riverfront District Industrial	3	3	
Springbrook District - Employment	22	19	3
<b>Total</b>	<b>130</b>	<b>89</b>	<b>41</b>

Of the 34 buildable acres in Springbrook District Village, about 12 will be for retail use. This is reflected in the table above.

*(Source: Springbrook Master Plan)*

# Buildable Land by Site Size

## Buildable acres on vacant and partially vacant lots by size, Newberg UGB

	Buildable acres in taxlots						Total
	less than 0.5 acre	0.5 - 1 acres	1 - 2 acres	2 - 5 acres	5 - 10 acres	10 - 25 acres	
Commercial	3	3	7	13	8	21	55
Mixed Use	2	1	6	2		12	24
Industrial	3	4	3	23		19	51
<b>Total</b>	<b>7</b>	<b>8</b>	<b>16</b>	<b>38</b>	<b>8</b>	<b>52</b>	<b>130</b>

## Number of lots with buildable vacant and partially vacant land by size, Newberg UGB

	Taxlots with buildable acres						Total
	less than 0.5 acre	0.5 - 1 acres	1 - 2 acres	2 - 5 acres	5 - 10 acres	10 - 25 acres	
Commercial	2	3	4	4	1	2	16
Mixed Use	3	2	2	1		1	9
Industrial	2	3	1	3		1	10
<b>Total</b>	<b>7</b>	<b>8</b>	<b>7</b>	<b>8</b>	<b>1</b>	<b>4</b>	<b>35</b>

# Employment Forecast and Commercial Land Sufficiency

## Recap: Employment Forecast Assumptions

- Employment base
- Growth rates
- Mix of employment
- Employment in residential areas
- Employment density

*Please note: The numbers in the employment forecast are subject to change, with refinement of the EOA.*

# Employment Forecast: Potential Growth Rates

## Employment Growth Forecast, Newberg UGB, 2021 to 2041

**Employment Base:** Estimate 2018 Total Employment in Newberg, about 13,466 jobs, decreased by 10% to account for recent unemployment.

**Growth Rates:** Consider potential growth rates.

Newberg grew by 837 covered jobs or at 0.9% AAGR between 2008 and 2018.

Year	Jobs grow at the rate of...	
	Population growth for the City (1.39%)	Employment growth in the region (1.13%)
2021	12,119	12,119
2041	15,963	15,179
<b>Change 2021 to 2041</b>		
Employees	3,844	3,060
Percent	32%	25%
AAGR	1.39%	1.13%

### Two safe harbor options

1. OED growth rate for Mid-Valley Region (1.13%)
2. **Updated** PSU population growth rate for Newberg (1.39%)

\*Note: PSU population forecasts were updated in June 2020

# Types of Employment

## Future mix of employment:

*Assuming jobs grow at the population growth rate (1.39%)*

Note: Industrial employment share based on 2008 employment data

Land Use Type	2021		2041		Change 2021 to 2041
	Employment	% of Total	Employment	% of Total	
Industrial	3,030	25%	5,587	35%	2,557
Retail Commercial	1,333	11%	1,437	9%	104
Office & Commercial Services	6,908	57%	7,982	50%	1,074
Government	848	7%	959	6%	111
<b>Total</b>	<b>12,119</b>	<b>100%</b>	<b>15,963</b>	<b>100%</b>	<b>3,846</b>

### Industrial businesses that left Newberg:

- Polymax >> Hubbard
- NW Alpine >> Salem
- Halstead Cabinets >> Salem
- Advance Machinery >> Tualatin
- Aviatrix >> Sherwood
- Westrock (closed mill site)



# Employment in Residential Plan Designations

## Emp. in residential plan designations:

*Assuming growth at the rate of population (1.39%)*

Land Use Type	New Employment Growth	Emp. In Res. Designations	New Emp. on Vacant Land
Retail Commercial	104	16	88
Office & Commercial Services	1,074	169	905
<b>Total</b>	<b>1,178</b>	<b>185</b>	<b>993</b>

Amount of employment in residential assumptions (based on 2018 employment):

- Retail – 2%
- Office Commercial – 16%

# Commercial Employment Densities

- Current employment densities in Newberg
  - Retail Commercial: 16 employees per acre
  - Office Commercial: 22 employees per acre
- Land in rights-of-way
  - Commercial (including Retail and Office): 19%

# Commercial Land Demand

## Future employment land need:

*Assuming growth at the rate of population (1.39%)*

Land Use Type	New Emp. on Vacant Land	Employees per Acre (Net Acres)	Land Demand (Net Acres)	Land Demand (Gross Acres)
Retail Commercial	88	16	6	7
Office & Commercial Services	905	22	42	52
<b>Total</b>	<b>993</b>		<b>47</b>	<b>59</b>

*Note: Industrial land demand will be calculated using a different approach*

# Preliminary Commercial Land Sufficiency

## Land sufficiency:

*Assuming growth at the rate of population (1.39%)*

Land Use Type	Land Supply (Suitable Gross Acres)	Land Demand (Gross Acres)	Land Sufficiency (Deficit)
Commercial	79	59	20
<b>Total</b>	<b>79</b>	<b>59</b>	<b>20</b>

*Note: Industrial land need will be calculated using a different approach*

# Updated Discussion of Site Needs

# Potential Target Industries

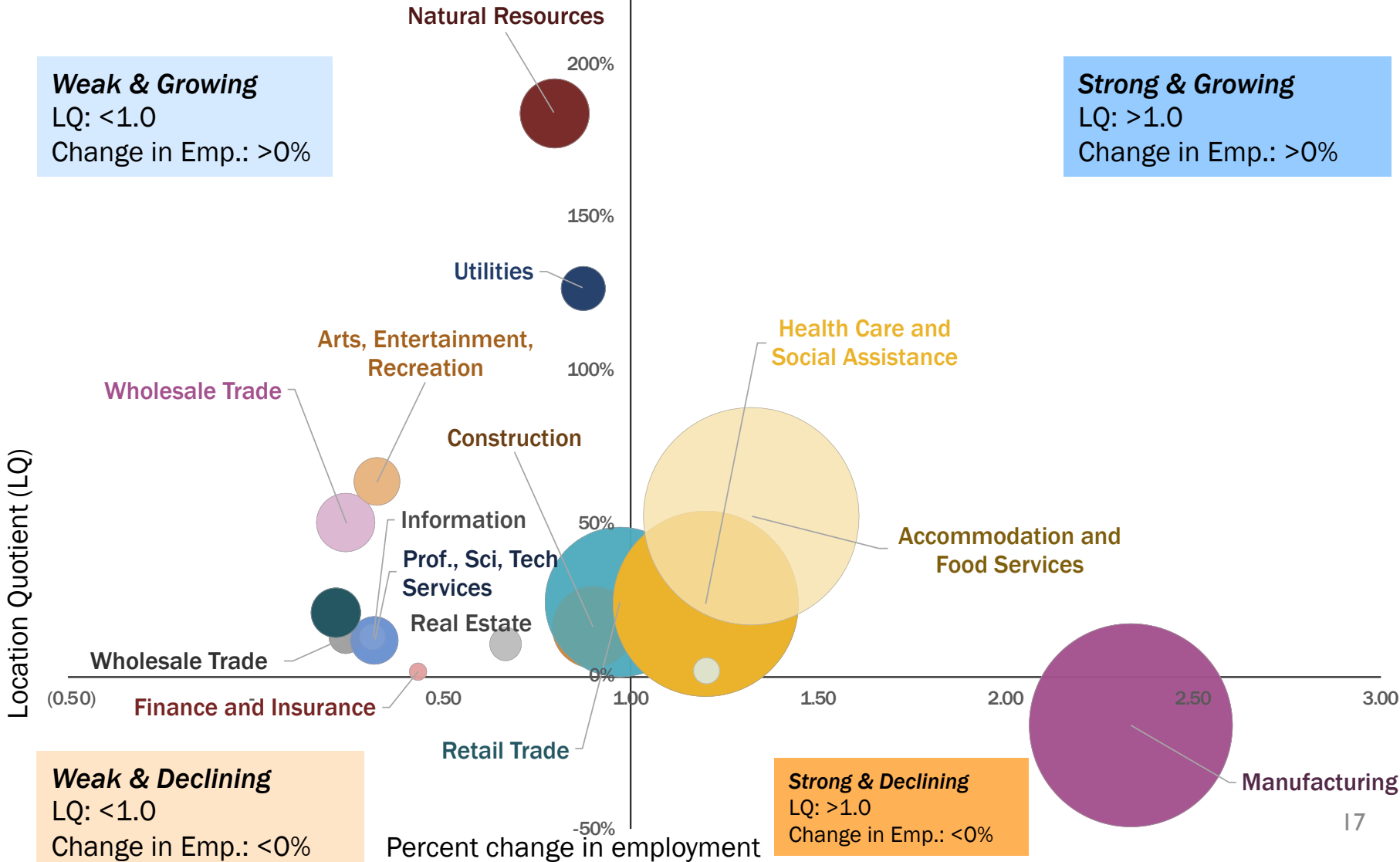
- Advanced and General Manufacturing
  - Dental and Medical Equipment
  - Machine Shops
  - Storage, Logistics, and Distribution
- Technology and High-Tech Manufacturing
  - Electronics and Software
  - Semiconductors
  - Health/Medical Information
- Food/Beverage Processing and Agricultural Products
  - Farming
  - Value-add Food Manufacturing
- Forestry and Wood Products
  - Forest Management
  - Lumber and Logs
  - MPP and CLT
- Aviation related industries
  - Specialty Aircraft Equipment
  - Air Travel and Tourism
  - Parts Machining and Repair

Note: This list was refined since the May meeting based on input from City staff and SEDCOR.

# Potential Target Industries

## Concentration and Growth of Industries, Newberg UGB, 2008-2018

Source: ECONorthwest analysis of Oregon Employment Department, Quarterly Census of Employment and Wages, 2008 & 2018.



# Characteristics of Sites by Industries

STATE OF OREGON - Infrastructure Finance Authority  
Industrial Development Competitiveness Matrix



PROFILE  CRITERIA		Production Manufacturing		Value-Added Manufacturing and Assembly		Light / Flex Industrial			Warehousing & Distribution		Specialized			
		A	B	C	D	E	F	G	I	H	J	K	L	
		Heavy Industrial / Manufacturing	High-Tech / Clean-Tech Manufacturing	Food Processing	Advanced Manufacturing & Assembly	General Manufacturing	Industrial Business Park and R&D Campus	Business / Admin Services	Regional Warehouse / Distribution	Local Warehouse / Distribution	UVA Manufacturing / Research	Data Center	Rural Industrial	
1	<b>GENERAL REQUIREMENTS</b>		Use is permitted outright, located in UGB or equivalent and outside flood plain; and site (NCDA) does not contain contaminants, wetlands, protected species, or cultural resources or has mitigation plan(s) that can be implemented in 180 days or less.											
<b>PHYSICAL SITE</b>														
2	TOTAL SITE SIZE**	Competitive Acreage*	10 - 100+	5 - 100+	5 - 25+	5 - 25+	5 - 15+	20 - 100+	5 - 15+	20 - 100+	10 - 25+	10 - 25+	10 - 25+	5 - 25+
3	COMPETITIVE SLOPE:	Maximum Slope	0 to 5%	0 to 5%	0 to 5%	0 to 7%	0 to 5%	0 to 7%	0 to 12%	0 to 5%	0 to 5%	0 to 7%	0 to 7%	0 to 5%
<b>TRANSPORTATION</b>														
5	TRIP GENERATION:	Average Daily Trips per Acre	40 to 60 (ADT / acre)	40 to 60 (ADT / acre)	50 to 60 (ADT / acre)	40 to 60 (ADT / acre)	40 to 50 (ADT / acre)	60 to 150 (ADT / acre)	170 to 180 (ADT / acre)	40 to 80 (ADT / acre)	40 to 80 (ADT / acre)	40 to 80 (ADT / acre)	20 to 30 (ADT / acre)	40 to 50 (ADT / acre)
6	MILES TO INTERSTATE OR OTHER PRINCIPAL ARTERIAL:	Miles	w/ in 10	w/ in 10	w/ in 30	w/ in 15	w/ in 20	N/A	N/A	w/ in 5 (only interstate or equivalent)	w/ in 5 (only interstate or equivalent)	N/A	w/ in 30	N/A
7	RAILROAD ACCESS:	Dependency	Preferred	Preferred	Preferred	Not Required	Preferred	Preferred	Not Required	Preferred	Preferred	Not Required	Avoid	N/A
8	PROXIMITY TO MARINE PORT:	Dependency	Preferred	Preferred	Preferred	Not Required	Preferred	Preferred	Not Required	Preferred	Preferred	Not Required	Not Required	N/A
9	PROXIMITY TO REGIONAL COMMERCIAL AIRPORT:	Dependency	Preferred	Competitive	Preferred	Competitive	Preferred	Required	Preferred	Preferred	Preferred	Preferred	Competitive	N/A
		Distance (Miles)	w/ in 60	w/ in 60	w/ in 60	w/ in 30	w/ in 60	w/ in 30	w/ in 60	w/ in 60	w/ in 60	w/ in 60	w/ in 30	w/ in 60
##	PROXIMITY TO INTERNATIONAL AIRPORT:	Dependency	Preferred	Competitive	Preferred	Competitive	Preferred	Competitive	Preferred	Preferred	Preferred	Competitive	Preferred	N/A
		Distance (Miles)	w/ in 300	w/ in 300	w/ in 300	w/ in 100	w/ in 300	w/ in 100	w/ in 300	w/ in 300	w/ in 300	w/ in 300	w/ in 100	w/ in 300
<b>UTILITIES</b>														
##	WATER:	Min. Line Size (Inches/Dmtr)	8" - 12"	12" - 16"	12" - 16"	8" - 12"	6" - 10"	8" - 12"	4" - 6"	4" - 8"	4" - 6"	4" - 8"	16"	4" - 8"
		Min. Fire Line Size (Inches/Dmtr)	10" - 12"	12" - 18"	10" - 12"	10" - 12"	8" - 10"	8" - 12"	6" - 10"	10" - 12"	6" - 8"	6" - 10"	10"-12"	6" (or alternate source)
		High Pressure Water Dependency	Preferred	Required	Required	Preferred	Not Required	Preferred	Not Required	Not Required	Not Required	Not Required	Not Required	Required



# Types of Sites Target Industries may Need

Target Industry	High Tech	Food Proc.	Adv. Mfg.	Gen. Mfg.	Ind. Bus. Park	Reg. Warehouse	Local Warehouse	Special-ized
Advanced+ General Manufacturing	✓		✓	✓	✓			✓
Food/Beverage Processing + Agriculture Products		✓	✓				✓	
Forestry + Wood Products			✓	✓	✓		✓	
Tech + High Tech Manuf.	✓		✓		✓			✓
Aviation related industries			✓	✓	✓			✓

# Characteristics of Sites by Target Industries

Site Characteristics	General + Advanced Mfg.	Food/ Bev. Process.+ Ag Products	Forestry and Wood Products	Tech + High Tech Mfg. / Tech.	Aviation Related Ind.
Site Size (acres)	5-25+	5-25+	5-25+	5-100+	5-25+
Slope	0 to 7%	0 to 5%	0 to 7%	0 to 5%	0 to 7%
Railroad Access	Preferred	Preferred	Preferred	Preferred	<i>Depends on specific industry</i>
Highway Access (mi. to interstate)	within 20	within 30	within 5-20	within 60	within 20 (or n/a)
Special Utility Needs	Electricity redundancy dependency; Higher demand for electricity, gas, and telecom	High pressure water dependency	<i>Depends on specific industry</i>	High pressure water dependency; Very high utility demands	<i>Depends on specific industry</i>

# Industrial Land Demand and Sufficiency

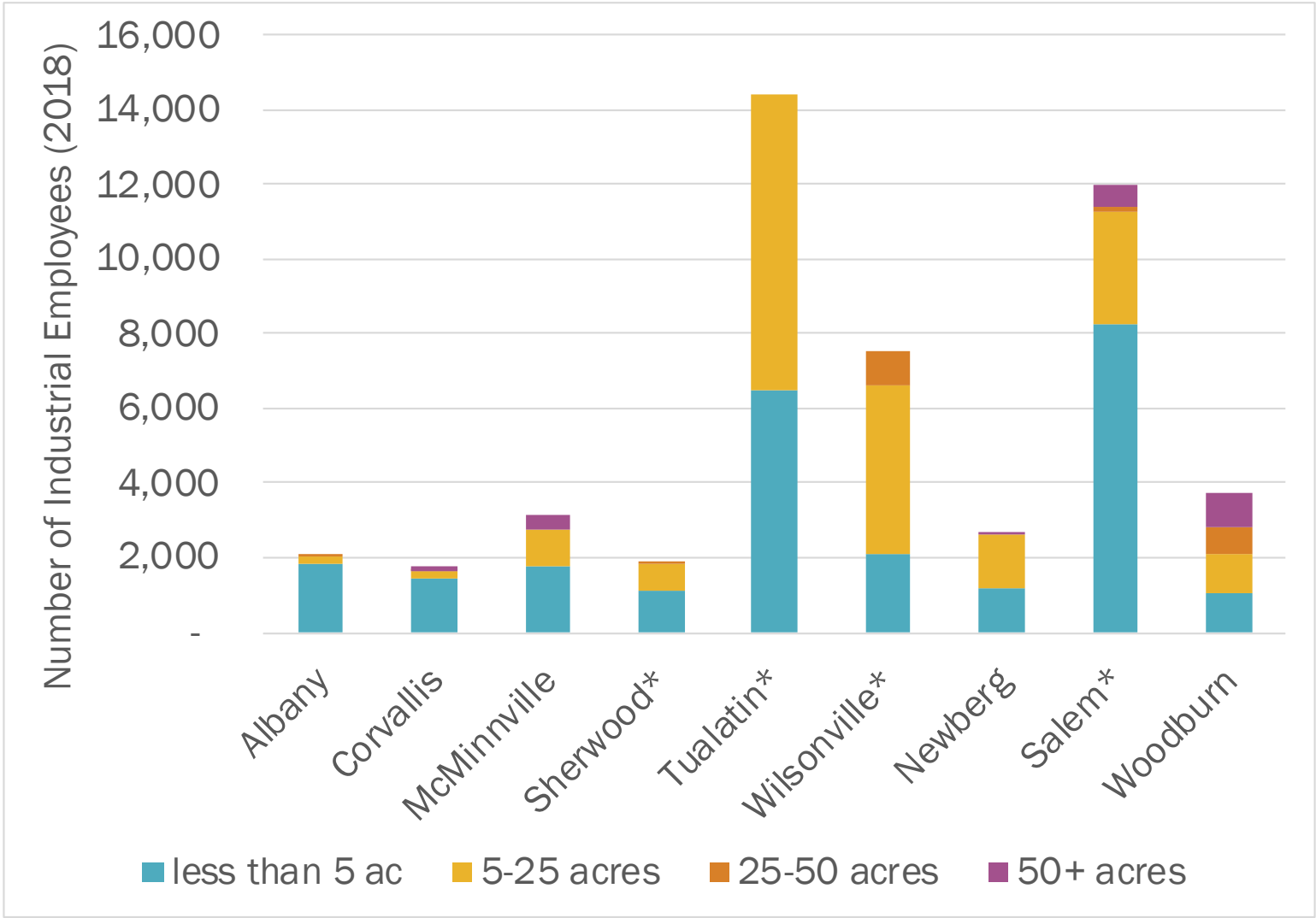
# Industrial Land Demand in Newberg

- Forecast shows Newberg will have growth of 2,557 employees in industrial sectors
- Target industries will generally need sites 5 to 25 acres; some will need larger and some will need smaller sites
- How many sites and acres of industrial land will Newberg need in the future?

# Regional Development Patterns

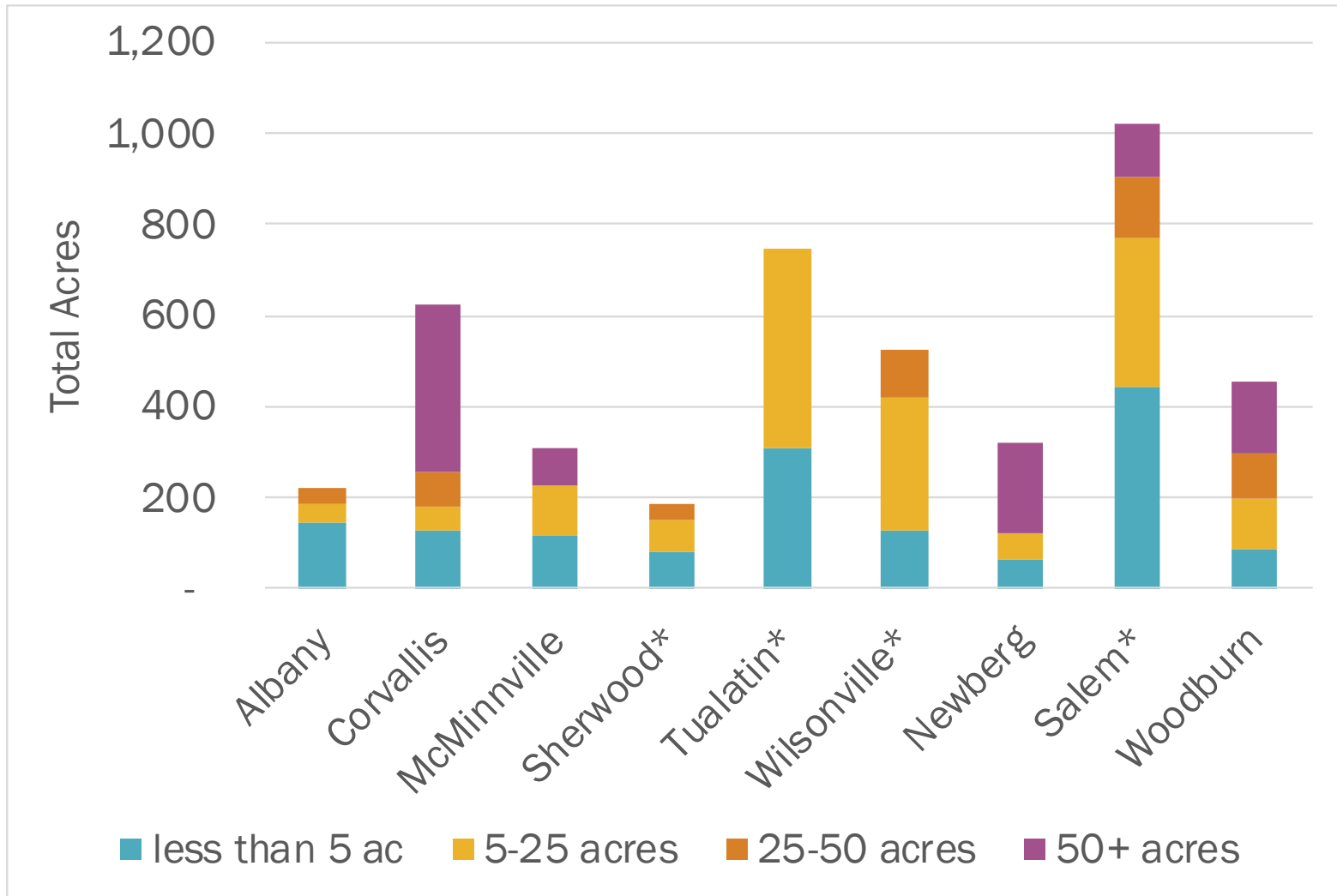
- We compiled information about industrial employment and site characteristics for: Albany, Corvallis, McMinnville, Sherwood, Wilsonville, Newberg, Salem, and Woodburn
  - Industrial employment includes employment in the following sectors: Manufacturing, Construction, Utilities, Wholesale Trade, Transportation and Warehousing, and Agricultural and Forestry Services.
- Separated employment into the following site sizes:
  - Smaller than 5 acres, 5-25 acres, 25-50 acres, and 50+ acres

# Industrial Employees by City



Source: Oregon Employment Department's Quarterly Census of Employment and Wages;  
Analysis by ECONorthwest  
\*Analysis for city limits only

# Acres of Land with Industrial Employment



Source: Oregon Employment Department's Quarterly Census of Employment and Wages; County and City-level parcel datasets; Analysis by ECONorthwest

Note: The analysis only included sites where at least 75% of employment on the site is industrial.

\*Analysis for city limits only

# Characteristics of Regional Sites

## Regional Site Characteristics

Analysis based on averages of industrial employment at sites in the following cities: Albany, Corvallis, McMinnville, Sherwood, Wilsonville, Newberg, Salem, and Woodburn

	Less than 5 Acres	5-25 acres	25-50 acres	50 and more
Percent of existing employment	51%	41%	4%	4%
Number of Employees per site	15	133	128	203
Average Site size (acres)	0.9	9.9	32.7	92.3

Source: Oregon Employment Department's Quarterly Census of Employment and Wages;  
County and City-level parcel data sets;  
Analysis by ECONorthwest



# Newberg Industrial Land Site Needs

## Industrial Land Need for 2,557 new industrial employees.

Analysis based on the averages of industrial employment.

	Less than 5 Acres	5-25 acres	25-50 acres	50 and more	Total
<b>New Employment by Site Size</b>					
Percent of new employment*	46%	41%	5.00%	8.00%	100%
Number of Employees in Newberg	1,176	1,048	128	205	2,557
<b>New Sites Needed</b>					
Employees per site*	15	133	128	203	
New Sites Needed in Newberg	79	8	1	1	89
<b>New Land Needed</b>					
Average Site size*	0.9	9.9	32.7	92.3	
Acres of land in Newberg (acres)	71	79	33	92	275

Source: Oregon Employment Department's Quarterly Census of Employment and Wages;  
County and City-level parcel data sets;

Analysis by ECONorthwest

\*Assumptions based on the regional analysis.

# Industrial Land Sufficiency

**Explanation of industrial land sufficiency – using sites less than 5 acres**

## Comparison of land supply and need

- Subtract “new sites needed” from existing “vacant sites” in the BLI.
  - 79 needed sites minus 22 vacant sites = deficit of 57 sites

## Acres of land needed

- 57 needed sites times an average site size of 0.9 acres = 51 needed acres

	Less than 5 Acres	5-25 acres	25-50 acres	50 and more	Total
Number of Vacant Sites: Newberg BLI	22	1	-	-	23
New Sites Needed	79	8	1	1	89
<b>Comparison of Land Supply and Need (Land Surplus or Deficit)</b>	<b>(57)</b>	<b>(7)</b>	<b>(1)</b>	<b>(1)</b>	<b>(66)</b>
<b>Acres of land Needed</b>	<b>51</b>	<b>69</b>	<b>33</b>	<b>92</b>	<b>246</b>

Source: Oregon Employment Department’s Quarterly Census of Employment and Wages;  
County and City-level parcel data sets  
Analysis by ECONorthwest

# Conclusions and Next Steps

# Preliminary Conclusion

- Newberg has enough commercial land to accommodate growth
- Newberg does not have enough industrial land to accommodate growth
- What potential strategies can Newberg use to accommodate employment growth?

- Draft EOA document
- Draft strategies to accommodate growth

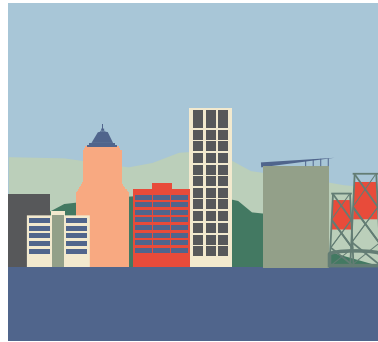
Note: September TAC/CAC Meetings to be rescheduled

# ECONorthwest

ECONOMICS • FINANCE • PLANNING



Eugene



Portland



Seattle



Boise

PROFILE		Production Manufacturing		Value-Added Manufacturing and Assembly		Light / Flex Industrial			Warehousing & Distribution		Specialized			
		A	B	C	D	E	F	G	I	H	J	K	L	
		Heavy Industrial / Manufacturing	High-Tech / Clean-Tech Manufacturing	Food Processing	Advanced Manufacturing & Assembly	General Manufacturing	Industrial Business Park and R&D Campus	Business / Admin Services	Regional Warehouse / Distribution	Local Warehouse / Distribution	UVA Manufacturing / Research	Data Center	Rural Industrial	
1	<b>GENERAL REQUIREMENTS</b>	Use is permitted outright, located in UGB or equivalent and outside flood plain; and site (NCDA) does not contain contaminants, wetlands, protected species, or cultural resources or has mitigation plan(s) that can be implemented in 180 days or less.												
PHYSICAL SITE														
2	TOTAL SITE SIZE**	Competitive Acreage*	10 - 100+	5 - 100+	5 - 25+	5 - 25+	5 - 15+	20 - 100+	5 - 15+	20 - 100+	10 - 25+	10 - 25+	10 - 25+	5 - 25+
3	COMPETITIVE SLOPE:	Maximum Slope	0 to 5%	0 to 5%	0 to 5%	0 to 7%	0 to 5%	0 to 7%	0 to 12%	0 to 5%	0 to 5%	0 to 7%	0 to 7%	0 to 5%
TRANSPORTATION														
5	TRIP GENERATION:	Average Daily Trips per Acre	40 to 60 (ADT / acre)	40 to 60 (ADT / acre)	50 to 60 (ADT / acre)	40 to 60 (ADT / acre)	40 to 50 (ADT / acre)	60 to 150 (ADT / acre)	170 to 180 (ADT / acre)	40 to 80 (ADT / acre)	40 to 80 (ADT / acre)	40 to 80 (ADT / acre)	20 to 30 (ADT / acre)	40 to 50 (ADT / acre)
6	MILES TO INTERSTATE OR OTHER PRINCIPAL ARTERIAL:	Miles	w/ in 10	w/ in 10	w/ in 30	w/ in 15	w/ in 20	N/A	N/A	w/ in 5 (only interstate or equivalent)	w/ in 5 (only interstate or equivalent)	N/A	w/ in 30	N/A
7	RAILROAD ACCESS:	Dependency	Preferred	Preferred	Preferred	Not Required	Preferred	Preferred	Not Required	Preferred	Preferred	Not Required	Avoid	N/A
8	PROXIMITY TO MARINE PORT:	Dependency	Preferred	Preferred	Preferred	Not Required	Preferred	Preferred	Not Required	Preferred	Preferred	Not Required	Not Required	N/A
9	PROXIMITY TO REGIONAL COMMERCIAL AIRPORT:	Dependency	Preferred	Competitive	Preferred	Competitive	Preferred	Required	Preferred	Preferred	Preferred	Preferred	Competitive	N/A
		Distance (Miles)	w/ in 60	w/ in 60	w/ in 60	w/ in 30	w/ in 60	w/ in 30	w/ in 60	w/ in 60	w/ in 60	w/ in 60	w/ in 30	N/A
##	PROXIMITY TO INTERNATIONAL AIRPORT:	Dependency	Preferred	Competitive	Preferred	Competitive	Preferred	Competitive	Preferred	Preferred	Preferred	Competitive	Preferred	N/A
		Distance (Miles)	w/ in 300	w/ in 300	w/ in 300	w/ in 100	w/ in 300	w/ in 100	w/ in 300	w/ in 300	w/ in 300	w/ in 100	w/ in 300	N/A
UTILITIES														
##	WATER:	Min. Line Size (Inches/Dmtr)	8" - 12"	12" - 16"	12" - 16"	8" - 12"	6" - 10"	8" - 12"	4" - 6"	4" - 8"	4" - 6"	4" - 8"	16"	4" - 8"
		Min. Fire Line Size (Inches/Dmtr)	10" - 12"	12" - 18"	10" - 12"	10" - 12"	8" - 10"	8" - 12"	6" - 10"	10" - 12"	6" - 8"	6" - 10"	10"-12"	6" (or alternate source)
		High Pressure Water Dependency	Preferred	Required	Required	Preferred	Not Required	Preferred	Not Required	Not Required	Not Required	Not Required	Required	Not Required
		Flow Gallons per Day per Acre	1600 (GPD / Acre)	5200 (GPD / Acre)	3150 (GPD / Acre)	2700 (GPD / Acre)	1850 (GPD / Acre)	2450 (GPD / Acre)	1600 (GPD / Acre)	500 (GPD / Acre)	500 (GPD / Acre)	1600 (GPD / Acre)	50-200 (Gallons per MWh) †	1200 (GPD / Acre)
##	SEWER:	Min. Service Line Size (Inches/Dmtr)	6" - 8"	12" - 18"	10" - 12"	10" - 12"	6" - 8"	10" - 12"	6" - 8"	4"	4"	6"	8"-10"	4" - 6" (or on-site source)
		Flow (Gallons per Day per Acre)	1500 (GPD / Acre)	4700 (GPD / Acre)	2600 (GPD / Acre)	2500 (GPD / Acre)	1700 (GPD / Acre)	2000 (GPD / Acre)	1600 (GPD / Acre)	500 (GPD / Acre)	500 (GPD / Acre)	1300 (GPD / Acre)	1000 (GPD / Acre) ‡	1000 (GPD / Acre)
##	NATURAL GAS:	Preferred Min. Service Line Size (Inches/Dmtr)	4" - 6"	6"	4"	6"	4"	6"	2"	2"	2"	2"	4"	N/A
		On Site	Competitive	Competitive	Preferred	Competitive	Competitive	Competitive	Preferred	Preferred	Preferred	Preferred	Preferred	Preferred
##	ELECTRICITY:	Minimum Service Demand	2 MW	4-6 MW	2-6 MW	1 MW	0.5 MW	0.5 MW	0.5 MW	1 MW	1 MW	0.5 MW	5-25 MW	1 MW
		Close Proximity to Substation	Competitive	Competitive	Not Required	Competitive	Preferred	Competitive	Preferred	Not Required	Not Required	Not Required	Required, could be on site	Not Required
		Redundancy Dependency	Required	Preferred	Not Required	Required	Not Required	Competitive	Required	Not Required	Not Required	Not Required	Required	Not Required
##	TELECOMMUNICATIONS:	Major Communications Dependency	Preferred	Required	Preferred	Required	Required	Required	Required	Preferred	Preferred	Required	Required	Preferred
		Route Diversity Dependency	Not Required	Required	Not Required	Required	Not Required	Preferred	Required	Not Required	Not Required	Not Required	Required	Not Required
		Fiber Optic Dependency	Preferred	Required	Preferred	Required	Preferred	Required	Required	Preferred	Preferred	Required	Required	Not Required
##	SPECIAL CONSIDERATIONS:	<p>Adequate distance from sensitive land uses (residential, parks, large retail centers) necessary. High throughput of materials. Large yard spaces and/or buffering required. Often transportation related requiring marine/rail links.</p> <p>Acreage allotment includes expansion space (often an exercisable option). Very high utility demands in one or more areas common. Sensitive to vibration from nearby uses.</p> <p>May require high volume/supply of water and sanitary sewer treatment. Often needs substantial storage/yard space for input storage. Onsite water pre-treatment needed in many instances.</p> <p>Increased setbacks may be required. Onsite utility service areas. Avoid sites close to wastewater treatment plants, landfills, sewage lagoons, and similar land uses. Lower demands for water and sewer treatment than Production High-Tech Manufacturing.</p> <p>Surrounding environment of great concern (vibration, noise, air quality, etc.).</p> <p>Adequate distance from sensitive land uses (residential, parks) necessary. Moderate demand for water and sewer. Higher demand for electricity, gas, and telecom.</p> <p>High diversity of facilities within business parks. R&amp;D facilities benefit from close proximity to higher education facilities. Moderate demand on all infrastructure systems.</p> <p>Relatively higher parking ratios may be necessary. Will be very sensitive to labor force and the location of other similar centers in the region. High reliance on telecom infrastructure.</p> <p>Transportation routing and proximity to/from major highways is crucial. Expansion options required. Truck staging requirements mandatory. Minimal route obstructions between the site and interstate highway such as rail crossings, drawbridges, school zones, or similar obstacles.</p> <p>Transportation infrastructure such as roads and bridges to/from major highways is most competitive factor.</p> <p>Must be located within or near FAA-regulated UAV testing sites. Moderate utility demands. Low reliance on transportation infrastructure.</p> <p>Larger sites may be needed. The 25 acre site requirement represents the more typical site. Power delivery, water supply, and security are critical. Surrounding environment (vibration, air quality, etc.) is crucial. May require high volume/supply of water and sanitary sewer treatment.</p> <p>Located in more remote locations in the state. Usually without direct access (within 50 miles) of Interstate or City of more than 50,000 people.</p>												

Mackenzie; Business Oregon

**Terms:**

<p>More Critical</p> <p>↑</p> <p>Less Critical</p>	<p>'Required' factors are seen as mandatory in a vast majority of cases and have become industry standards</p>
	<p>'Competitive' significantly increases marketability and is <i>highly recommended by Business Oregon</i>. May also be linked to financing in order to enhance the potential reuse of the asset in case of default.</p>
	<p>'Preferred' increases the feasibility of the subject property and its future reuse. Other factors may, however, prove more critical.</p>
<p>* Competitive Acreage: Acreage that would meet the site selection requirements of the majority of industries in this sector.</p>	
<p>**Total Site: Building footprint, including buffers, setbacks, parking, mitigation, and expansion space</p>	
<p>† Data Center Water Requirements: Water requirement is reported as gallons per MWh to more closely align with the Data Center industry standard reporting of Water Usage Effectiveness (WUE).</p>	
<p>‡ Data Center Sewer Requirements: Sewer requirement is reported as 200% of the domestic usage at the Data Center facility. Water and sewer requirements for Data Centers are highly variable based on new technologies and should be reviewed on a case-by-case basis for specific development requirements.</p>	