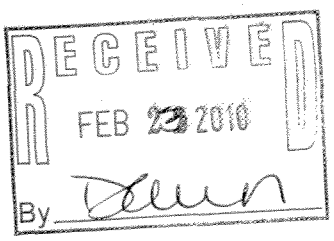

BEFORE THE LAND USE BOARD OF APPEALS

OF THE STATE OF OREGON

FRIENDS OF YAMHILL COUNTY, LEE DOES, AMY DOES, GRACE SCHAAD. RANEE SOLOMONSSON, CHERYL MCCAFFREY	)	
Petitioners,	)	LUBA No.: 2010-_____
v.	)	
CITY OF NEWBERG	)	
Respondent	)	

NOTICE OF INTENT TO APPEAL

I.

Notice is hereby given that the petitioners intend to appeal the land use decision of the respondent entitled "Ordinance No. 2010-2723 – An Ordinance Adopting the Revised Economic Opportunities Analysis for the City of Newberg and Adopting Associated Comprehensive Plan Amendments." A copy of the decision is attached. The decision was made on February 1, 2010.

II.

The petitioners are represented by James S. Coon, Swanson Thomas & Coon, 820 SW 2nd Ave Ste 200, Portland, OR 97204; phone no. 503-228-5222.

III.

The respondent's mailing address is 414 E 1st Street, Newberg, OR 97132; phone number 503-538-9421. Its legal counsel is Terrence D. Mahr, 414 E 1st Street, Newberg, OR 97132; phone number 503-538-9421.

IV.

Other persons mailed written notice of the land use decision by the City of Newberg, as indicated by its records, consist of the persons listed in the attachment to this Notice.

1 NOTICE:

2 Anyone designated in the attachment to this Notice who desires to participate as a party
3 in this case before the Land Use Board of Appeals must file with the Board a Motion to
4 Intervene in this proceeding as required by OAR 661-10-0050.

5

6 DATED: February 22, 2010

7 Respectfully submitted,
8 SWANSON THOMAS & COON
9
10
11
12
13 James S. Coon, OSB No. 771450
14 Attorney for Petitioners

ORDINANCE NO. 2010-2723

AN ORDINANCE ADOPTING THE REVISED ECONOMIC OPPORTUNITIES ANALYSIS FOR THE CITY OF NEWBERG AND ADOPTING ASSOCIATED COMPREHENSIVE PLAN AMENDMENTS

RECITALS:

1. The original Economic Opportunities Analysis (EOA) was adopted by City Council in January 2006 by Ordinance 2006-2635. The EOA is considered part of the Comprehensive Plan and implements the goals and policies in Section H. The Economy. Much of the information found in the EOA is statistical and dynamic in nature, including demographic and economic statistics, population and employment projections, and buildable land inventories. Therefore, the EOA is not a static document and is meant to be updated with current information from time to time. Having an updated EOA also ensures the City's compliance with Statewide Planning Goal 9: Economic Development.

2. The updates to the EOA include the following: population, demographic, economic and employment statistics; an economic trends analysis section that looks at national, state and regional trends, regional economic development industry clusters and target industries, Yamhill County agri-business, and regional industrial land availability; a new section that covers an assessment of our community economic development potential; a more robust discussion of Newberg's economic development strategy; and updated buildable land inventories and the addition of maps that illustrate the available industrial and commercial buildable land by area.

3. The Comprehensive Plan document has a small section with population and land supply and need information. Those numbers have changed with the updated EOA and need to also be updated in the Comprehensive Plan document. The Comprehensive Plan amendments also add five new policies to Section H.

4. The Newberg Planning Commission held hearings on December 10, 2009 and January 14, 2010 to consider the request. The Planning Commission passed Resolution 2009-275, recommending that the City Council adopt the revised Economic Opportunities Analysis and the accompanying Comprehensive Plan amendments.

5. After proper notice, the City Council held a hearing on February 1, 2010 to consider the request. The Council finds that the proposal meets the applicable criteria.

THE CITY OF NEWBERG ORDAINS AS FOLLOWS:

1. The revised Economic Opportunities Analysis, as shown in Exhibit "A", is hereby adopted and by this reference incorporated.

2. The Comprehensive Plan amendments, as shown in Exhibit "B", are hereby adopted and by this reference incorporated.

3. The findings in support of this proposal, as shown in Exhibit "C", are hereby adopted and by this reference incorporated.

- **EFFECTIVE DATE** of this ordinance is 30 days after the adoption date, which is: March 2, 2010.

ADOPTED by the City Council of the City of Newberg, Oregon, this 1st day of February, 2010, by the following votes: **AYE: 7** **NAY: 0** **ABSENT: 0** **ABSTAIN: 0**

Norma I. Alley

Norma I. Alley, City Recorder

ATTEST by the Mayor this 4th day of February, 2010.

Bob Andrews

Bob Andrews, Mayor

LEGISLATIVE HISTORY

By and through the Newberg Planning Commission at their 01/14/2010 meeting.

Attachment A

Public Testimony for EOA - written and oral					
Name	**Street Address**	**City**	**State**	**Zip**	**Meeting Date**
Roger Currier	504 Pinehurst Dr	Newberg	OR	97132	12/10/2009
Grace Schaad	31525 NE Schaad Rd	Newberg	OR	97132	12/10/2009 & 2/1/10
Vicki Shepherd	30230 NE Benjamin Rd	Newberg	OR	97132	12/10/09 & 2/1/10
Robert & Dorothy Roholt	31150 NE Schaad Rd	Newberg	OR	97132	12/10/09 & 2/1/10
Sid Friedman / 1000 Friends of Oregon	189 Liberty St NE	Salem	OR	97301	12/10/09, 1/14/10, 2/1/10
Ken Wegter	3872 Camishaun Ct NE	Salem	OR	97305	12/10/09 & 2/1/10
Lee & Dr. Amy Does	10730 NE Renne Rd	Newberg	OR	97132	12/10/09 & 2/1/10
MaryAnn Tack	1400 Villa Rd	Newberg	OR	97132	12/10/2009
Marvin Schneider	1159 N Main St	Newberg	OR	97132	01/14/2010
Craig Markham	22245 NE Ilafern Ln	Dundee	OR	97115	12/10/2009
Julie Fugate	14500 NE Richard Ln	Newberg	OR	97132	02/01/2010
Sydney Wermlinger	20895 Arbor Grove Rd NE	St Paul	OR	97137	1/14/10 & 2/1/10
Lewis Schaad	31655 NE Schaad Rd	Newberg	OR	97132	02/01/2010
Saj Jivanjee	32230 NE Old Parrett Mt Rd	Newberg	OR	97132	12/10/09 & 2/1/10

CERTIFICATE OF FILING AND SERVICE

I hereby certify that on February 22, 2010, I filed the original of this **Notice of Intent to Appeal** together with two (2) copies, with the Land Use Board of Appeals, 550 Capitol Street NE, Suite 235, Salem, Oregon 97301-2552, by certified mail.

I also certify that on February 22, 2010, I served a true and correct copy of this **Notice of Intent to Appeal** on the City of Newberg at 414 E 1st Street, Newberg, OR 97132, on Terrence D. Mahr at 414 E 1st Street, Newberg, OR 97132, and on all persons listed in paragraph IV of this Notice (including those persons listed in Attachment A), pursuant to OAR 661-10-0015(2), by first class mail.

DATED: February 22, 2010.

SWANSON THOMAS & COON

James S. Coon, OSB No. 771450
Attorney for Petitioners

Oregon
Theodore R. Kulongoski, Governor

Department of Land Conservation and Development
635 Capitol Street, Suite 150
Salem, OR 97301-2540
(503) 373-0050
Fax (503) 378-5518
www.lcd.state.or.us

NOTICE OF ADOPTED AMENDMENT

2/12/2010

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

FROM: Plan Amendment Program Specialist

SUBJECT: City of Newberg Plan Amendment
DLCD File Number 006-09

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

Appeal Procedures*

DLCD ACKNOWLEDGMENT or DEADLINE TO APPEAL: Friday, February 26, 2010

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

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

*NOTE: The Acknowledgment or Appeal Deadline is based upon the date the decision was mailed by local government. A decision may have been mailed to you on a different date than it was mailed to DLCD. As a result, your appeal deadline may be earlier than the above date specified. NO LUBA Notification to the jurisdiction of an appeal by the deadline, this Plan Amendment is acknowledged.

Cc: Barton Brierley, City of Newberg
Gloria Gardiner, DLCD Urban Planning Specialist
Steve Oulman, DLCD Regional Representative
Angela Lazarean, DLCD Urban Planner
Thomas Hogue, DLCD Regional Representative

<paa> YA

☐ in person ☐ electronic ☐ mailed

FORM 2 **DLCD**

Notice of Adoption

DEPT OF

FEB 08 2010

LAND CONSERVATION AND DEVELOPMENT

This Form 2 must be mailed to DLCD within **5-Working Days after the Final Ordinance is signed** by the public Official Designated by the jurisdiction and all other requirements of ORS 197.615 and OAR 660-018-000

Jurisdiction: **City of Newberg** Local file number: **CPTA4-09-001**

Date of Adoption: **February 1, 2010** Date Mailed: **February 5, 2010**

Was a Notice of Proposed Amendment (Form 1) mailed to DLCD? ☒ Yes ☐ No Date: 10/26/09

☒ Comprehensive Plan Text Amendment ☐ Comprehensive Plan Map Amendment

☐ Land Use Regulation Amendment ☐ Zoning Map Amendment

☐ New Land Use Regulation ☐ Other:

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

A revised and updated Economic Opportunities Analysis for the City of Newberg. Revisions and updates include the following: population, demographic, economic and employment statistics; an economic trends analysis section that looks at national, state and regional trends, regional economic development industry clusters and target industries, Yamhill County agribusiness, and regional land availability; a new section that covers an assessment of our community economic development potential; a more robust discussion of Newberg's economic development strategy; and updated buildable land inventories and the addition of maps that illustrate the available industrial and commercial buildable land by area.

The updates include amendments to the Comprehensive Plan so that the data is coordinated with the EOA (population and land supply and need information). Five new policies were added to Section H (The Economy) in the Comprehensive Plan.

Does the Adoption differ from proposal? Yes, slightly

The proposed version sent in October was a draft – through the process different sections of the report have been revised further. In addition, the final report incorporates the latest employment data from the Oregon Employment Department, which was not released until November 2009.

Plan Map Changed from: to:

Zone Map Changed from: to:

Location: Acres Involved:

Specify Density: Previous: New:

Applicable statewide planning goals:

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
☐	☒	☐	☐	☐	☐	☐	☐	☒	☐	☐	☐	☐	☒	☐	☐	☐	☐	☐

Was an Exception Adopted? ☐ YES ☒ NO

Did DLCD receive a Notice of Proposed Amendment...

45-days prior to first evidentiary hearing? ☒ **Yes** ☐ **No**

DLCD File No. 006-09 (17911) [15979]

If no, do the statewide planning goals apply? ☐ Yes ☐ No

If no, did Emergency Circumstances require immediate adoption? ☐ Yes ☐ No

DLCD file No. _____

Please list all affected State or Federal Agencies, Local Governments or Special Districts:

Local Contact: Jessica Nunley, AICP Phone: (503)554-7744 Extension:

Address: PO Box 970 / 414 E First St Fax Number: 503-537-1272

City: Newberg Zip: 97132 E-mail Address: jessica.nunley@newberg oregon.gov

ADOPTION SUBMITTAL REQUIREMENTS

This Form 2 must be received by DLCD no later than 5 days after the ordinance has been signed by the public official designated by the jurisdiction to sign the approved ordinance(s)

per ORS 197.615 and OAR Chapter 660, Division 18

1. This Form 2 must be submitted by local jurisdictions only (not by applicant).
2. When submitting, please print this **Form 2** on light **green paper if available**.
3. Send this Form 2 and **One (1) Complete Paper Copy and One (1) Electronic Digital CD** (documents and maps) of the Adopted Amendment to the address in number 6:
4. **Electronic Submittals: Form 2 – Notice of Adoption will not be accepted via email or any electronic or digital format at this time.**
5. The Adopted Materials must include the final decision signed by the official designated by the jurisdiction. The Final Decision must include approved signed ordinance(s), finding(s), exhibit(s), and any map(s).
6. **DLCD Notice of Adoption must be submitted in One (1) Complete Paper Copy and One (1) Electronic Digital CD via United States Postal Service, Common Carrier or Hand Carried to the DLCD Salem Office and stamped with the incoming date stamp.** (for submittal instructions, also see # 5)] **MAIL** the **PAPER COPY and CD** of the Adopted Amendment to:

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

7. Submittal of this Notice of Adoption must include the signed ordinance(s), finding(s), exhibit(s) and any other supplementary information (see ORS 197.615).
8. Deadline to appeals to LUBA is calculated **twenty-one (21) days** from the receipt (postmark date) of adoption (see ORS 197.830 to 197.845).
9. In addition to sending the Form 2 - Notice of Adoption to DLCD, please notify persons who participated in the local hearing and requested notice of the final decision at the same time the adoption packet is mailed to DLCD (see ORS 197.615).
10. **Need More Copies?** You can now access these forms online at http://www.lcd.state.or.us/. You may also call the DLCD Office at (503) 373-0050; or Fax your request to: (503) 378-5518.

ORDINANCE NO. 2010-2723

AN ORDINANCE ADOPTING THE REVISED ECONOMIC OPPORTUNITIES ANALYSIS FOR THE CITY OF NEWBERG AND ADOPTING ASSOCIATED COMPREHENSIVE PLAN AMENDMENTS

RECITALS:

1. The original Economic Opportunities Analysis (EOA) was adopted by City Council in January 2006 by Ordinance 2006-2635. The EOA is considered part of the Comprehensive Plan and implements the goals and policies in Section H. The Economy. Much of the information found in the EOA is statistical and dynamic in nature, including demographic and economic statistics, population and employment projections, and buildable land inventories. Therefore, the EOA is not a static document and is meant to be updated with current information from time to time. Having an updated EOA also ensures the City's compliance with Statewide Planning Goal 9: Economic Development.

2. The updates to the EOA include the following: population, demographic, economic and employment statistics; an economic trends analysis section that looks at national, state and regional trends, regional economic development industry clusters and target industries, Yamhill County agri-business, and regional industrial land availability; a new section that covers an assessment of our community economic development potential; a more robust discussion of Newberg's economic development strategy; and updated buildable land inventories and the addition of maps that illustrate the available industrial and commercial buildable land by area.

3. The Comprehensive Plan document has a small section with population and land supply and need information. Those numbers have changed with the updated EOA and need to also be updated in the Comprehensive Plan document. The Comprehensive Plan amendments also add five new policies to Section H.

4. The Newberg Planning Commission held hearings on December 10, 2009 and January 14, 2010 to consider the request. The Planning Commission passed Resolution 2009-275, recommending that the City Council adopt the revised Economic Opportunities Analysis and the accompanying Comprehensive Plan amendments.

5. After proper notice, the City Council held a hearing on February 1, 2010 to consider the request. The Council finds that the proposal meets the applicable criteria.

THE CITY OF NEWBERG ORDAINS AS FOLLOWS:

1. The revised Economic Opportunities Analysis, as shown in Exhibit "A", is hereby adopted and by this reference incorporated.

2. The Comprehensive Plan amendments, as shown in Exhibit "B", are hereby adopted and by this reference incorporated.

3. The findings in support of this proposal, as shown in Exhibit "C", are hereby adopted and by this reference incorporated.

- **EFFECTIVE DATE** of this ordinance is 30 days after the adoption date, which is: March 2, 2010.

ADOPTED by the City Council of the City of Newberg, Oregon, this 1st day of February, 2010, by the following votes: **AYE: 7** **NAY: 0** **ABSENT: 0** **ABSTAIN: 0**

Norma I. Alley

Norma I. Alley, City Recorder

ATTEST by the Mayor this 4th day of February, 2010.

Bob Andrews

Bob Andrews, Mayor

LEGISLATIVE HISTORY

By and through the Newberg Planning Commission at their 01/14/2010 meeting.

City of Newberg
414 E. First Street
P.O. Box 970
Newberg, OR 97132

City Manager
(503) 538-9421

(503) 538-5013 FAX

Planning and Building Department

P.O. Box 970 • 414 E. First Street • Newberg, Oregon 97132 • (503) 537-1215 • Fax (503) 537-1272

February 5, 2010

Name
Street Address
City State Zip

Subject: Revised Economic Opportunities Analysis, Ordinance 2010-2723

Dear Name:

On February 1, 2010, the Newberg City Council approved Ord. 2010-2723, adopting a revised Economic Opportunities Analysis and associated Comprehensive Plan amendments. The ordinance becomes effective March 2, 2010, which is 30 days from the date of approval. You may find the Ordinance and the revised Economic Opportunities Analysis on the City's website by following this link: http://www.newbergoregon.gov/economicdevelopment/revised-economic-opportunities-analysis-february-2010.

Any party aggrieved by this decision may appeal to the Land Use Board of Appeals (LUBA) by first filing a "Notice of Intent to Appeal" within 21 days after the land use decision became final (OAR-661-010-0010(3)). The land use decision was final on February 1, 2010 and the deadline for filing the "Notice of Intent to Appeal" is February 22, 2010. For details on filing an appeal, contact the Land Use Board of Appeals at 503.373.1265 (550 Capitol Street NE Suite 235, Salem, OR 97301-2552).

If you have any questions, please feel free to contact me at 503-554-7744.

Sincerely,

Jessica Nunley
Assistant Planner

cc: File CPTA4-09-001

Public Testimony for EOA - written and oral					
Name	**Street Address**	**City**	**State**	**Zip**	**Meeting Date**
Roger Currier	504 Pinehurst Dr	Newberg	OR	97132	12/10/2009
Grace Schaad	31525 NE Schaad Rd	Newberg	OR	97132	12/10/2009 & 2/1/10
Vicki Shepherd	30230 NE Benjamin Rd	Newberg	OR	97132	12/10/09 & 2/1/10
Robert & Dorothy Roholt	31150 NE Schaad Rd	Newberg	OR	97132	12/10/09 & 2/1/10
Sid Friedman / 1000 Friends of Oregon	189 Liberty St NE	Salem	OR	97301	12/10/09, 1/14/10, 2/1/10
Ken Wegter	3872 Camishaun Ct NE	Salem	OR	97305	12/10/09 & 2/1/10
Lee & Dr. Amy Does	10730 NE Renne Rd	Newberg	OR	97132	12/10/09 & 2/1/10
MaryAnn Tack	1400 Villa Rd	Newberg	OR	97132	12/10/2009
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Craig Markham	22245 NE Ilafern Ln	Dundee	OR	97115	12/10/2009
Julie Fugate	14500 NE Richard Ln	Newberg	OR	97132	02/01/2010
Sydney Wermlinger	20895 Arbor Grove Rd NE	St Paul	OR	97137	1/14/10 & 2/1/10
Lewis Schaad	31655 NE Schaad Rd	Newberg	OR	97132	02/01/2010
Saj Jivanjee	32230 NE Old Parrett Mt Rd	Newberg	OR	97132	12/10/09 & 2/1/10

REQUEST FOR COUNCIL ACTION

DATE ACTION REQUESTED: February 1, 2010

Order No.	Ordinance No. 2010-2723	Resolution No.	Motion	Information
____	XX	____	___	___

SUBJECT: **Revised and updated Economic Opportunities Analysis for the City of Newberg and associated Comprehensive Plan amendments.**	**Contact Person (Preparer) for this Ordinance: Jessica Nunley, AICP** **Dept.: Planning & Building** **File No.: CPTA4-09-001** *(if applicable)*

HEARING TYPE: ☒ **LEGISLATIVE** ☐ **QUASI-JUDICIAL**

RECOMMENDATION:

Adopt **Ordinance No. 2010-2723** which adopts the revised Economic Opportunities Analysis for the City of Newberg and adopts associated Comprehensive Plan amendments that reflect the updated data.

EXECUTIVE SUMMARY: The original Economic Opportunities Analysis (EOA) was adopted by City Council in January 2006 by Ordinance 2006-2635. The EOA is considered part of the Comprehensive Plan and implements the goals and policies in Section H. The Economy. Much of the information found in the EOA is statistical and dynamic in nature, including demographic and economic statistics, population and employment projections, and buildable land inventories. Therefore, the EOA is not a static document and is meant to be updated with current information from time to time. The accompanying Comprehensive Plan amendments update similar statistical information and add five new policies to Section H. Having an updated EOA also ensures the city's compliance with Statewide Planning Goal 9: Economic Development.

Summary of the EOA: Newberg's economic base has diversified over time and several of its home-grown industries have become national and international leaders in their respective fields. The City is slowly transitioning into more of an urban center for east Yamhill County as the population grows. However, Newberg citizens have made it clear that they value the "live here, work here, shop here" values and way of life. To keep up the City's commitment to the values of its residents, Newberg must strengthen its economic base and provide adequate industrial and commercial lands for current and future populations. The revised EOA has updated data on demographic and economic statistics to help us plan for these future populations.

Newberg has identified four business clusters that are the foundation of its economy: manufacturing, health care, higher education, and the wine/tourism industry. Ensuring the vitality of these business clusters is key to the economic health of our community. Newberg's economic development efforts focus on two principal strategies: 1) retention and expansion of existing businesses, and 2) recruitment of new businesses. The availability of developable land for businesses is a large part of Newberg's economic development strategy, and the City closely monitors the inventory of available land to ensure that there are opportunities for economic growth. The revised EOA has updated data on regional industry clusters and trends, an assessment of our community economic development potential, and an updated discussion of Newberg's economic development strategy.

The industrial and commercial buildable land supply tables in the revised EOA indicate a shortage of both types of land within the current Newberg Urban Growth Boundary. It is critical for economic development efforts to have adequate buildable land available that meets the identified site suitability requirements for

both industrial and commercial areas. The City cannot help provide enough jobs for current and future residents without adequate land to locate new businesses on, and without adequate land for existing businesses to expand onto. Newberg does have many advantages that make it stand out in the regional marketplace, including the following: small town quality of life; access to quality education and skills training; strong established and growing industry clusters; strong local support for business and employment opportunities; proximity to the Portland Metropolitan Region; future Newberg-Dundee Bypass; and compliance with Oregon's statewide planning goals. The revised EOA includes updated buildable lands inventories and an updated discussion of Newberg's comparative advantages and disadvantages, along with strategies to address each.

Summary of Changes to the EOA:

- Updated population, demographic, economic and employment statistics.
- An economic trends analysis section that looks at national, state and regional trends, regional economic development industry clusters and target industries, Yamhill County agri-business, and regional industrial land availability.
- A new section that covers an assessment of our community economic development potential. This section includes updated employment projects, a discussion of Newberg's comparative advantages and disadvantages relative to similar regional markets, and Newberg's special opportunities to capitalize on its unique geographic niche in the regional marketplace.
- A more robust discussion of Newberg's economic development strategy. The current EOA focuses largely on regional targeted industry clusters; the revised version of the EOA focuses more on our local targeted industry clusters as the foundation of our economic development efforts. This section also includes actions to capitalize on Newberg's comparative advantages and to address the comparative disadvantages, and actions to implement the overall economic development strategy.
- Updated buildable land inventories and the addition of maps that illustrate the available industrial and commercial buildable land by area.

FISCAL IMPACT: There is no direct fiscal impact to the City by adopting the revised EOA and associated Comprehensive Plan amendments. However, the EOA is the basis of future land use decisions which may impact the City financially in the future. The revised EOA has updated employment and population projections, and updated buildable land inventories for employment lands. The updated projections and inventories show a growth in population and demand for employment land over the next 30 years. This will eventually require an expansion of the urban growth boundary and addition of employment lands to the City.

STRATEGIC ASSESSMENT: Because the EOA is a dynamic document that relies on statistical information, it is important that it be updated from time to time. An updated EOA document also allows decision makers to have a level of certainty in the data when they make land use decisions. The EOA helps the City be in compliance with Statewide Planning Goal 9 (Economic Development), which requires that:

> *"Comprehensive plans for urban areas shall: 1. Include an analysis of the community's economic patterns, potentialities, strengths, and deficiencies as they relate to state and national trends; 2. Contain policies concerning the economic development opportunities in the community; 3. Provide for at least an adequate supply of sites of suitable sizes, types, locations, and service levels for a variety of industrial and commercial uses consistent with plan policies; and 4. Limit uses on or near sites zoned for specific industrial and commercial uses to those which are compatible with proposed uses" (OAR*

660-015-0000(9)).

The EOA is considered part of the Comprehensive Plan, and fulfills the role of providing this information for the City.

ATTACHMENTS:

Ordinance 2010-2723 with:

Exhibit A: Revised Economic Opportunities Analysis (January 2010)
Exhibit B: Comprehensive Plan Amendments
Exhibit C: Findings

1. Planning Commission Resolution 2009-275 with:
   Exhibit A: Revised Economic Opportunities Analysis (January 2010), by reference
   Exhibit B: Comprehensive Plan Amendments, by reference
   Exhibit C: Findings, by reference
2. Minutes from the December 10, 2009 Planning Commission meeting
3. Letter from Tom Fox, dated December 1, 2009
4. Comments from Steve Oulman, dated November 30, 2009
5. Johnson-Gardner report: *City of Newberg – Demand for Commercial and Industrial Land,* 2004
6. Employment Projections by Industry and Occupation, 2008-2018, Region 3 (Marion, Polk, and Yamhill Counties), Oregon Employment Department
7. Portland Metro Labor Trends, December 2009, Oregon Employment Department
8. Snapshot of Statewide Recruitment, Retention & Expansion Projects (July 2006), OECDD
9. Coldwell Banker Commercial brochures (with recent transactions and current client needs), December 2007, October 2008, August 2009
10. Public Comments and Correspondence

ORDINANCE NO. 2010-2723

AN ORDINANCE ADOPTING THE REVISED ECONOMIC OPPORTUNITIES ANALYSIS FOR THE CITY OF NEWBERG AND ADOPTING ASSOCIATED COMPREHENSIVE PLAN AMENDMENTS

RECITALS:

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2. The updates to the EOA include the following: population, demographic, economic and employment statistics; an economic trends analysis section that looks at national, state and regional trends, regional economic development industry clusters and target industries, Yamhill County agri-business, and regional industrial land availability; a new section that covers an assessment of our community economic development potential; a more robust discussion of Newberg's economic development strategy; and updated buildable land inventories and the addition of maps that illustrate the available industrial and commercial buildable land by area.

3. The Comprehensive Plan document has a small section with population and land supply and need information. Those numbers have changed with the updated EOA and need to also be updated in the Comprehensive Plan document. The Comprehensive Plan amendments also add five new policies to Section H.

4. The Newberg Planning Commission held hearings on December 10, 2009 and January 14, 2010 to consider the request. The Planning Commission passed Resolution 2009-275, recommending that the City Council adopt the revised Economic Opportunities Analysis and the accompanying Comprehensive Plan amendments.

5. After proper notice, the City Council held a hearing on February 1, 2010 to consider the request. The Council finds that the proposal meets the applicable criteria.

THE CITY OF NEWBERG ORDAINS AS FOLLOWS:

1. The revised Economic Opportunities Analysis, as shown in Exhibit "A", is hereby adopted and by this reference incorporated.

2. The Comprehensive Plan amendments, as shown in Exhibit "B", are hereby adopted and by this reference incorporated.

3. The findings in support of this proposal, as shown in Exhibit "C", are hereby adopted and by this reference incorporated.

- **EFFECTIVE DATE** of this ordinance is 30 days after the adoption date, which is: March 2, 2010.

ADOPTED by the City Council of the City of Newberg, Oregon, this 1st day of February, 2010, by the following votes: **AYE: 7** **NAY: 0** **ABSENT: 0** **ABSTAIN: 0**

Norma I. Alley

Norma I. Alley, City Recorder

ATTEST by the Mayor this 4th day of February, 2010.

Bob Andrews

Bob Andrews, Mayor

LEGISLATIVE HISTORY

By and through the Newberg Planning Commission at their 01/14/2010 meeting.

Exhibit A

Economic Opportunities Analysis

Section 12 of Newberg Inventory of Natural and Cultural Resources

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City of Newberg
Economic Opportunities Analysis

Table of Contents

Table of Tables iii
Table of Figures iv
I. Introduction 1
II. Economic Trends Analysis 3
National, State and Regional Trends 3
Regional Economic Development Industry Clusters and Target Industries 9
Yamhill County Agri-Business 10
Regional Industrial Land Availability 13
Newberg Population Profile 14
Historic and Future Growth Trends 14
Age characteristics 15
Educational Attainment and Income 15
Commuting Patterns 18
Newberg Employment Characteristics 19
Historic Economy 19
Current Economy 20
Retail Conditions 24
III. Assessment of Community Economic Development Potential 25
Regional Employment Projections 25
Newberg Employment Projections 25
Newberg's Comparative Advantages and Disadvantages 27
Comparative Advantages 27
Comparative Disadvantages 29
Special Opportunities 30
Dental Equipment Cluster 30
Alternative Energies 31
South Industrial Area 31
Aviation Related Industry 32
Nursery and other Agricultural Products 32
Wine/Tourism Industry 33
Retail 34
IV. Newberg's Economic Development Strategy 35
Capitalizing on Comparative Advantages & Addressing Comparative Disadvantages 35
Regional Focus 36
Locally Targeted Economic Development Industry Clusters (Target Industries) 38
Comprehensive Plan Policies and Recommended Supportive Economic Development Actions 39
V. Industrial and Commercial Land Needs and Supply 41
Industrial Land Need 41
Industrial Employment Projections 41

Industrial Site Requirements 42
Industrial Land and Sites 47
2030 Industrial Site Need vs. Supply 50
Commercial Land Need 50
Commercial Land Need 50
Commercial Site Requirements 54
Commercial Land and Sites 55
2030 Commercial Site Need and Supply 56
VI. Conclusion 58

Table of Tables

Table 12- 1: Yamhill County Value of Agricultural Production, 2007 11
Table 12- 2: Newberg Census Populations 14
Table 12- 3: Population Forecasts - Newberg Urban Area 15
Table 12- 4: Comparative Age Characteristics 15
Table 12- 5: Comparative Educational Attainment 16
Table 12- 6: Comparative Household Income 17
Table 12- 7: Comparative Median Household Income and Median Wages 17
Table 12- 8: Place of Work for Workers Living in Newberg 19
Table 12- 9: 2007 City of Newberg Annual Average Employment by Industry 21
Table 12- 10: Estimated Newberg Employment by Industry 2007-2009 22
Table 12- 11: Newberg Top Employers 2009 23
Table 12- 12: Population and Retail Sales 24
Table 12- 13: Combined Employment Projection for Regions 2, 3, and 15, 2008-2018 25
Table 12- 14: Projected Newberg Employment through 2040 26
Table 12- 15: Strategies to Capitalize on Comparative Advantages 35
Table 12- 16: Strategies to Address Comparative Disadvantages 36
Table 12- 17: Newberg Targeted Industries 39
Table 12- 18: Industrial Space Utilizing Employment Projection through 2040 41
Table 12- 19: Site Size Ranges by Targeted Industrial Cluster and Sector 43
Table 12- 20: Targeted Industry Clusters and Sectors by Site Size Ranges and Existing Newberg Industrial Firm Examples 44
Table 12- 21: Site Size Distribution by Firm Employment (2010-2030) 45
Table 12- 22: Required Industrial Site Suitability Characteristics 46
Table 12- 23: Buildable Industrial Land in Newberg UGB (2009) 48
Table 12- 24: 2010-2030 Industrial Land Supply and Need 50
Table 12- 25: Office Space Utilizing Employment through 2040 51
Table 12- 26: Office Land Needs through 2040 52
Table 12- 27: Retail Land Needs through 2040 53
Table 12- 28: Commercial Land Needs, 2010-2040 53
Table 12- 29: Required Commercial Site Suitability Characteristics 55
Table 12- 30: Buildable Commercial Land in Newberg UGB (2009) 55
Table 12- 31: Commercial Land Supply and Need 56

Table of Figures

Figure 12- 1: Comparative Median Household Income and Median Wage 18
Figure 12- 2: Employed Workers over 16 by Industry 20
Figure 12- 3: Buildable Industrial Land, Newberg UGB 2009 49
Figure 12- 4: Commercial Areas and Buildable Commercial Land, Newberg UGB 2009 57

I. Introduction

Newberg's economy traditionally has been rural in nature. As the city with the second largest population in Yamhill County, Newberg serves as the commerce center for the eastern portion of the county's primarily agricultural economy. However, over the past couple of decades, Newberg has been making a slow transition to a city of more urban characteristics. Newberg's economic base has become more diversified, including some of its home-grown industries that have evolved into national and international leaders in their respective fields.

This trend toward urbanization is likely to continue as the growth of the Portland metropolitan area increasingly influences the character of Newberg. However, our city is one steeped in history, and is a community that possesses a strong sense of place. The citizens of Newberg highly value these characteristics and wish to maintain its unique identity. To do so, Newberg must strengthen its economic base. Newberg must support its existing businesses while nurturing new enterprises.

Newberg has identified four business clusters that are the foundation of its economy: manufacturing, health care, higher education, and the wine/tourism industry. Ensuring the vitality of these business clusters is key to the economic health of our community

Like most communities, Newberg's economic development efforts focus on two principal strategies:

1. Retention and Expansion of Existing Businesses. Newberg has been extremely fortunate in having strong commercial and industrial sectors. Newberg has an unwavering commitment to its existing businesses and industries. This commitment is underscored by the positive attitude of appointed and elected officials to meeting the needs of the business community – in terms of providing public facilities and services necessary for businesses to grow and prosper, and in listening to the business community in its long-range planning processes and regulatory review.

2. Recruitment of New Businesses. A substantial portion of Newberg's Economic Opportunities Analysis is devoted to attracting new traded-sector industrial and service-based industries that will bring new wealth to the community. To ensure that Newberg's economic development efforts are successful, we have carefully assessed economic trends and our comparative economic advantages and disadvantages, as required by Statewide Planning Goal 9 (Economy of the State).

   The City has worked closely with the Portland-Vancouver Regional Partners Council for Economic Development, the Oregon Business Development Department (OBDD), and the Department of Land Conservation and Development (DLCD) in defining the types of industry clusters that can be reasonably attracted to our community. Newberg also has determined the size and characteristics of sites required for Newberg to be competitive -- from a regional perspective -- in attracting our targeted businesses to the community.

Critical to Newberg's economic development efforts is the availability of developable land for

businesses, as redevelopment opportunities are limited. The City closely monitors the supply of these types of lands to ensure that opportunities for economic growth can be capitalized upon as they arise.

As for Newberg's targeted industrial clusters, most of these businesses require relatively flat sites, with a minimum of conflicting land uses (e.g., agricultural or residential areas), and close access to a major highway without travel through land with conflicting uses. Most will benefit tremendously by the construction of the Newberg-Dundee Bypass and its connection to Highway 219, which is planned in the Oregon Highway Plan.

The City also has considered the site characteristics required to attract targeted industrial clusters when considering Newberg relative to other Northwest communities. Newberg has identified four types of industrial development to focus on:

- Large site light industrial (individual sites reserved for single users);
- Airport light industrial (within the Sportsman Airpark Land Use Master Plan);
- Infill light industrial that takes advantage of remaining industrial sites within the existing UGB; and
- Master planned light industrial parks that provide a range of medium to small sites in a master planned setting.

The Oregon Business Development Department has made it very clear that providing large industrial sites for traded-sector employment opportunities in a master planned park setting with close access to Interstate 5 will put Newberg at a distinct advantage when compared with other Northwest communities.

Newberg has relatively little industrial land left within its UGB – and most of this land does not meet the site requirements of companies looking to expand and/or relocate to Newberg. After considering a range of alternatives both in and outside of the existing UGB, Newberg has concluded that the South Industrial Area best meets the site requirements of targeted industrial clusters. This area:

- Has large, flat "suitable" sites (i.e., meeting identified site requirements) with close access to Highway 219. The area has access within about 10 minutes to I-5, with no intervening urban areas. It has close access to the Highway 99W corridor, which will be further enhanced with construction of the Newberg-Dundee Bypass;
- Has natural buffers from adjacent agricultural and rural residential land that enhances the attractiveness of the area for traded-sector industrial use;
- Has immediate access to electrical, natural gas, sewer and water services;
- Is a natural extension of Newberg's existing light industrial and airport-related industrial areas.

Newberg's other primary existing business clusters (health care, higher education, wine/tourism) also must have opportunities for expansion if they are to remain vital. These businesses are usually located on lands zoned for commercial and/or institutional development.

Higher education institutions include George Fox University and Portland Community College. While the University currently owns sufficient land to satisfy its physical needs for the foreseeable future, much of that land is expected to be redeveloped to satisfy their programmatic needs. Portland Community College plans to build a branch campus in Newberg as a result of a bond measure that was passed in 2008. The College is nearing purchase of a site after an extended search yielded few opportunities for suitable sites.

The foundation of the local healthcare industry is Providence Newberg Medical Center, which is located at the east end of Newberg directly on Highway 99W. The hospital is located on land that will accommodate its expansion plans for the foreseeable future. Land to accommodate development of ancillary private medical services that would benefit from close proximity to the hospital is available.

The wine/tourism industry in Newberg is principally involved in the retail and service business sectors. Growing of the wine grapes and processing them into wine is done outside of Newberg's city limits. Further development of this industry will likely be accommodated through two mechanisms. First, Newberg's historical downtown buildings/land will continue to be reused and redeveloped for businesses of this industry, including direct sales of wine, restaurants, antiques, arts and crafts stores, etc. Second, the Springbrook Master Plan has a commercial node: one that is expected to include businesses that will cater to the needs of wine tourists. Moreover, this commercial node will be located next to the newly constructed Allison Inn and Spa, a high-end resort that targets wine tourists. Additional opportunities for manufacturing, processing, and storing wine could be made available if Newberg had adequate industrial land.

Finally, a community's economic development strategy must consist of more than ensuring the availability of an adequate land supply for future growth. The community also must commit to comprehensive set of actions that support local businesses. Included in this analysis is a list of recommended economic development actions that are intended to help Newberg assist its local economic partners.

II. Economic Trends Analysis

The EOA addresses local and regional trends (660-009-0015 (1)) on the following pages, concluding that Newberg's future employment growth will be dependent on regional economic clusters. The trends analysis results in identification of future industrial uses – the "Targeted Industrial Clusters" for Newberg.

National, State and Regional Trends

Economic development in Newberg over the next 20 years will occur in the context of long-run national trends.[1] The most important of these trends include:

- The aging of the baby boom generation, accompanied by increases in life expectancy. The number of people age 65 and older will more than double by 2050, while the number of

[1] National trends courtesy of ECONorthwest.

people under age 65 with grow only 22 percent. The economic effects of this demographic change include a slowing of the growth of the labor force, an increase in the demand for healthcare services, and an increase in the percent of the federal budget dedicated to Social Security and Medicare.[2]

Baby boomers are expecting to work longer than previous generations. An increasing proportion of people in their early to mid-50s expect to work full-time after age 65. In 2004, about 40% of these workers expect to work full-time after age 65, compared with about 30% in 1992.[3] This trend can be seen in Oregon, where the share of workers 65 years and older grew from 2% of the workforce in 1992 to 3% of the workforce in 2002, an increase of 64%. Over the same ten-year period, workers 45 to 64 years increased by 70%.[4]

- Tightening labor force. Growth in the labor force is projected to slow over the 2006-2016 period due to the aging and retirement of the baby boomer generation and because women's participation in the labor force has peaked. Job growth is expected to outpace population growth, with a 10% increase in employment (15.6 million jobs) compared to a 9% increase in civilian non-institutional population 16 years and older (22 million people).[5]
- Need for replacement workers. The need for workers to replace retiring baby boomers will outpace job growth. According to the Bureau of Labor Statistics, net replacement needs will be 33.4 million job openings over the 2006-2016 period, more than twice the growth in employment (15.6 million jobs). Management occupations and teachers will have the greatest need for replacement workers because these occupations have an older-than-average workforce.[6]
- Increases in labor productivity. Productivity, as measured by output per hour, increased over the 1995 to 2005 period. The largest increases in productivity occurred over the 1995 to 2000 period, led by industries that produced, sold, or intensively used information technology products. Productivity increased over the 2000 to 2005 period but at a slower rate than during the latter half of the 1990s. The sectors that experienced the largest productivity increases over the 2000 to 2005 period were: information, manufacturing, retail trade, and wholesale trade. Productivity in mining decreased over the five-year period. [7]
- Continued trend towards domestic outsourcing. Businesses continue to outsource work to less expensive markets. Outsourcing generally falls into two categories: (1) moving jobs from relatively expensive areas to less expensive areas within the U.S. and (2) moving jobs

[2] The Board of Trustees, Federal Old-Age and Survivors Insurance and Federal Disability Insurance Trust Funds, 2008, *The 2008 Annual Report of the Board of Trustees of the Federal Old-Age and Survivors Insurance and Federal Disability Insurance Trust Funds*, April 10, 2008.

[3] "The Health and Retirement Study," 2007, National Institute of Aging, National Institutes of Health, U.S. Department of Health and Human Services.

[4] "Growing Numbers of Older Workers in Oregon," Oregon Employment Department.

[5] Arlene Dohm and Lyn Shniper, "Occupational Employment Projections to 2016," *Monthly Labor Review*, November 2007, pp. 86-125.

[6] Arlene Dohm and Lyn Shniper, "Occupational Employment Projections to 2016," *Monthly Labor Review*, November 2007, pp. 86-125.

[7] Corey Holman, Bobbie Joyeaux, and Christopher Kask, "Labor Productivity trends since 2000, by sector and industry," Bureau of Labor Statistics *Monthly Labor Review*, February 2008.

outside of the U.S. to countries with lower labor costs. About three-quarters of layoffs in the U.S. between 1995 and 2004 were the result of domestic relocation, involving movement of work within the same company. The industries with the largest amounts of domestic outsourcing were: manufacturing, retail trade, and information.[8]

- Continued growth in global trade and the globalization of business activity. With increased global trade, both exports and imports rise. Faced with increasing domestic and international competition, firms will seek to reduce costs through implementing quality- and productivity-enhancing technologies, such as robotics or factory automation. In addition, production processes will continue to be outsourced offshore.[9]
- Continued shift of employment from manufacturing and resource-intensive industries to the service-oriented sectors of the economy. Increased worker productivity and the international outsourcing of routine tasks lead to declines in employment in the major goods-producing industries. Projections from the Bureau of Labor Statistics indicate that U.S. employment growth will continue to be strongest in healthcare and social assistance, professional and business services, and other service industries. Construction employment will also grow but manufacturing employment will decline.[10]
- The importance of high-quality natural resources. The relationship between natural resources and local economies has changed as the economy has shifted away from resource extraction. Increases in population and household income, combined with changes in tastes and preferences, have dramatically increased demands for outdoor recreation, scenic vistas, clean water, and other resource-related amenities. Such amenities contribute to a region's quality of life and play an important role in attracting both households and firms.[11]
- Continued westward and southward migration of the U.S. population. Although there are some exceptions at the state level, a 2006 U.S. Census report documents an ongoing pattern of interstate population movement from the Northeast and Midwest to the South and West.[12]
- The growing importance of education as a determinant of wages and household income. Level of education largely determines employment, which largely determines income level. Completion of a four-year college degree paves the way for a professional or managerial occupation in the information-based economy, which on average yields higher incomes than service jobs or menial labor. According to the Bureau of Labor Statistics, the majority of the

[8] Sharon P. Brown and Lewis B. Siegel, "Mass Layoff Data Indicate Outsourcing and Offshoring Work," *Monthly Labor Review*, August 2005, pp. 3-10.

[9] Eric B. Figueroa and Rose A. Woods, 2007, "Industry Output and Employment Projections to 2016," *Monthly Labor Review*, November 2007, pp. 53-85.

[10] Eric B. Figueroa and Rose A. Woods, 2007, "Industry Output and Employment Projections to 2016," *Monthly Labor Review*, November 2007, pp. 53-85.; Arlene Dohm and Lyn Shniper, "Occupational Employment Projections to 2016," *Monthly Labor Review*, November 2007, pp. 86-125.

[11] For a more thorough discussion of relevant research, *see*, for example, Power, T.M. and R.N. Barrett. 2001. *Post-Cowboy Economics: Pay and Prosperity in the New American West*. Island Press, and Kim, K.-K., D.W. Marcouiller, and S.C. Deller. 2005. "Natural Amenities and Rural Development: Understanding Spatial and Distributional Attributes." *Growth and Change* 36 (2): 273-297.

[12] Marc J. Perry, 2006, *Domestic Net Migration in the United States: 2000 to 2004*, Washington, DC, Current Population Reports, P25-1135, U.S. Census Bureau.

fastest growing occupations over the next decade will require an academic degree: computer software application engineers, elementary school teachers, and accountants and auditors. Service jobs, (e.g., retail sales person, food preparation workers, and home care aides) will account for about half of all jobs by 2016.[13]

- Continued increase in demand for energy. Despite short-term fluctuations, energy prices are forecast to remain at relatively high levels, as seen in the 2006 to 2008 period, likely increasing further over the 20-year planning period. Although energy sources are expected to diversify and the energy efficiency of automobiles, appliances, and production processes are projected to increase, energy demand is expected to increase over the 2008 to 2030 period due to increases in population and economic activity. [14]

- Impact of rising energy prices on commuting patterns. Energy prices may continue to be high (relative to historic energy prices) or continue to rise over the planning period[15] which may impact willingness to commute long distances. There is some indication that increases in fuel prices have resulted in decreased suburban housing demand which has resulted in decreased prices, especially in large urban areas (e.g., Los Angeles or Chicago) and suburbs far from the center city. If this pattern continues, the area in Oregon most likely to be most impacted is Portland, which has the largest area of urban and suburban development in the state.[16]

- Possible effect of rising transportation and fuel prices on globalization. Increases in globalization are related to the cost of transportation: When transportation is less expensive, companies move production to areas with lower labor costs. Oregon has benefited from this trend, with domestic outsourcing of call centers and other back office functions. In other cases, businesses in Oregon (and the nation) have "off-shored" employment to other countries, most frequently manufacturing jobs.

  Likewise, increases in either transportation or labor costs may impact globalization. When the wage gap between two areas is larger than the additional costs of transporting goods, companies are likely to shift operations to an area with lower labor costs. Conversely, when transportation costs increase, companies may have incentive to relocate to be closer to suppliers or consumers.
  This effect occurs incrementally over time and it is difficult to measure the impact in the short-term. If fuel prices and transportation costs decrease over the 20-year planning period, businesses may not make the decision to relocate (based on transportation costs) because the benefits of being closer to suppliers and markets may not exceed the costs of relocation.

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[13] In 2006, the national median income was about $32,000. Workers with some college education earned slightly less than median, while workers with a bachelor's degree earned $45,000. Workers who only had a high school diploma earned $26,000 a year, while workers without a high school degree only earned $19,000 a year. Workers in Oregon experience the same patterns as the nation, however, notably, pay is generally lower in Oregon than the national average. (Source: "Growing Number of Older Workers in Oregon," Oregon Employment Department and American Community Survey, U.S. Census, 2006.)

[14] Energy Information Administration, 2008, *Annual Energy Outlook 2008 with Projections to 2030*, U.S. Department of Energy, DOE/EIA-0383(2008), April.

[15] Energy Information Administration, 2008, *Annual Energy Outlook 2008 with Projections to 2030*, U.S. Department of Energy, DOE/EIA-0383(2008), April

[16] Cortright, Joe. "Driven to the Brink: How the Gas Price Spike Popped the Housing Bubble and devalued the Suburbs," May 2008.

- Growing opportunities for "green" businesses. Businesses are increasingly concerned with "green" business opportunities and practices. These business practices are concerned with "the design, commercialization, and use of processes and products that are feasible and economical while reducing the generation of pollution at the source and minimizing the risk to human health and the environment."[17]

  Green business opportunities historically have been at the mercy of feasibility and economics; if a firm ignores feasibility and economics while trying to be green, the firm may not be able to afford to operate long enough to learn how to make green businesses feasible. However, growing popularity in "eco-friendly" products and green development has caused the green market to become cost-competitive with the conventional market. The three types of green business opportunities are products, processes, and education.

  - *Producing green products.* In general, green products consume fewer resources, and create less pollution, which in turn, is beneficial to human health. For example, hybrid vehicles (which use a mixture of power or fuel sources), use less gasoline to operate and add fewer pollutants to the air, while still providing the same transportation services as a traditional vehicle. Another example is bamboo fencing and lumber, which is considered a "rapidly renewable" material.[18] Unlike traditional building materials, rapidly renewable materials, by virtue of a more consistent harvesting cycle, may sustain a community over a longer period of time than the steady and eventual depletion of finite resources or the degradation of a productive ecosystem.[19]
  - *Providing education about green practices or products.* Green education is often closely related to producing green products and is often done by consultants or nonprofit organizations. One example of a company involved in green education is the U.S. Green Building Council, a 501(c)(3) non-profit, which provides third-party verification that a building or community was designed and built using strategies aimed at improving environmental performance (LEED certification), provides numerous education resources and commissions studies geared to advance the green building movement. Another example is a consulting firm that writes a green plan for a city or business.
  - *Using green business practices.* Green business practices are alternative methods of doing business that promote resource conservation, prevent or reduce pollution, or have other beneficial environmental effects. Examples of green business processes include: buying products locally to reduce shipping distance, recycling waste products (where possible), or maximizing the use of natural lighting to reduce use of electricity and light bulbs.

- Potential impacts of global climate change. There is growing support for but not a consensus about whether global climate change is occurring as a result of greenhouse gas emissions. There is a lot of uncertainty surrounding global climate change, including the pace of climate change and the ecological and economic impacts of climate changes. In the Pacific

[17] Urban Green Partnership at urbangreenpartnership.org

[18] Rapidly renewable materials are considered to be an agricultural product, both fiber and animal that takes 10 years or less to grow or raise, and to harvest in an ongoing and sustainable fashion. Bamboo is the fastest-growing plant on Earth.

[19] New Construction and Major Renovation LEED Reference Guide, Version 2.2, U.S. Green Building Council (September 2006).

Northwest, climate change may result in the following changes: (1) increase in average temperatures, (2) shift in the type of precipitation, with more winter precipitation falling as rain, (3) decrease in mountain snow-pack and earlier spring thaw and (4) increases in carbon dioxide in the air.[20] Assuming that global climate change is occurring and will continue to occur over the next 20 years, a few broad, potential economic impacts for the nation and Pacific Northwest include:[21]

- *Potential impact on agriculture and forestry.* Climate change may impact Oregon's agriculture through changes in: growing season, temperature ranges, and water availability.[22] Climate change may impact Oregon's forestry through increase in wildfires, decrease in the rate of tree growth, change in mix of tree species, and increases in disease and pests that damage trees.[23]
- *Potential impact on tourism and recreation*. Impacts on tourism and recreation may range from: (1) decreases in snow-based recreation if snow-pack in the Cascades decreases, (2) negative impacts to tourism along the Oregon Coast as a result of damage and beach erosion from rising sea levels,[24] (3) negative impacts on availability of water summer river recreation (e.g., river rafting or sports fishing) as a result of lower summer river flows, and (4) negative impacts on the availability of water for domestic and business uses.
- *Potential changes in government policies*. There is currently no substantial national public policy response to global climate change. States and regional associations of states are in the process of formulating policy responses to address climate change including: increasing renewable energy generation, selling agricultural carbon sequestration credits, and encouraging energy efficiency.[25] Without clear indications of future government policy, it is impossible to assess the impact of government policies on the environment and subsequently, the economy.

However, the impending issue of global climate change will also offer economic *opportunities*. The search for alternative energy sources may result in increased investment and employment in "green" energy sources, such as wind, solar, and bio-fuels. Firms in the Northwest are well positioned to lead efforts on climate change mitigation, which may result in export products, such as renewable technologies or green manufacturing. [26]

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[20] "Economic Impacts of Climate Change on Forest Resources in Oregon: A Preliminary Analysis," Climate Leadership Initiative, Institute for Sustainable Environment, University of Oregon, May 2007.

[21] The issue of global climate change is complex and there is a substantial amount of uncertainty about climate change. This discussion is not intended to describe all potential impacts of climate change but to present a few ways that climate change may impact the economy of cities in Oregon and the Pacific Northwest.

[22] "The Economic Impacts of Climate Change in Oregon: A preliminary Assessment," Climate Leadership Initiative, Institute for Sustainable Environment, University of Oregon, October 2005.

[23] "Economic Impacts of Climate Change on Forest Resources in Oregon: A Preliminary Analysis," Climate Leadership Initiative, Institute for Sustainable Environment, University of Oregon, May 2007.

[24] "The Economic Impacts of Climate Change in Oregon: A preliminary Assessment," Climate Leadership Initiative, Institute for Sustainable Environment, University of Oregon, October 2005.

[25] Pew Center on Global Climate Change website: http://www.pewclimate.org/what_s_being_done/in_the_states/

[26] "The Economic Impacts of Climate Change in Oregon: A preliminary Assessment," Climate Leadership Initiative,

Short-term national trends will also affect economic growth in the region, but these trends are difficult to predict. At times these trends may run counter to the long-term trends described above. A recent example is the downturn in economic activity in 2007 following declines in the housing market and the mortgage banking crisis. The result of the economic downturn has been a decrease in employment related to the housing market, such as construction and real estate. Employment in these industries will recover as the housing market recovers and will continue to play a significant role in the national, state, and local economy over the long run. This report takes a long-run perspective on economic conditions (as the Goal 9 requirements intend) and does not attempt to predict the impacts of short-run national business cycles on employment or economic activity.

The national trends discussed above inform many of the emerging and targeted industry clusters identified in this EOA. They also underscore the importance of concentrating traded-sector industries in Newberg to reduce energy consumption and reliance on commuting. It's important to note that, despite national trends, Newberg has maintained a relatively high percentage of manufacturing jobs within the community and supports continuing to do so.

Regional Economic Development Industry Clusters and Target Industries

Industry clusters of a region are its principal economic drivers. The Portland Regional Business Plan identifies specific, traded-sector industry clusters that should be supported to enhance the economic base of the region. The Plan defines a cluster as follows:

> *A cluster is a group of firms that, though their interactions with each other and with their customers and suppliers, develop innovative, cutting-edge products and processes that distinguish them in the market place and from firms in the same industry found elsewhere. The competitiveness of an industry cluster is determined by the presence of highly specialized pools of skills, technology and infrastructure tailored to the needs of the cluster firms. The presence of sophisticated and demanding customers in a cluster pressures firms to innovate on a continuing basis....*
>
> *Those industry clusters that compete nationally and internationally are the core of this region's economy and what distinguishes it from other regions. The industry cluster that exist and that are emerging in the metropolitan area are built on the distinctive knowledge competencies of the region, and the strengths that currently enable the region to compete globally for economic activity and investment. Additionally, industries that sell their products and services nationally and internationally have greater long-term growth potential since their opportunities for growth are not constrained by the size of this region's market. For these reasons, focusing on industry clusters is both a more efficient and effective use of this region's efforts and resources.*

The Plan identifies the following industry clusters that the Portland region should focus on in their economic development efforts. Because of Newberg's proximity to the region, Newberg also has good likelihood of attracting these industries, and also should focus on attracting them.

Institute for Sustainable Environment, University of Oregon, October 2005.

These include:

1. Established
   a. High Tech (Semiconductors/Silicon, Imaging & Display Technology)
   b. Metals, Machinery, Transportation Equipment
   c. Nursery Products
   d. Specialty Foods and Food Processing
   e. Lumber and Wood Products

2. Emerging
   a. High Tech (Nano & Micro Technology, Cyber-Security, Health/Medical Information Technology)
   b. Creative Services (Advertising, Public Relations, Film and Video, Web/Internet Content and Design)
   c. Sports Apparel/Recreation-Related Products

3. Targeted (clusters desired to create and establish)
   a. Biotech/Bioscience (Medical Devices, Bioinfomatics, Pharmaceuticals, Genomics, Anti-Virals)
   b. Sustainable Industries (Renewable Energy, Resource Efficiency Technologies, Sustainable Building Materials, Green Chemistry)
   c. Professional Services (Architecture, Engineering, Legal and Financial Services, etc.)
   d. Distribution & Logistics

Newberg should provide opportunities for these industries to expand and locate within the Newberg UGB over the 20-year planning period. In addition, doing business in Newberg (e.g. real estate costs) can often be significantly lower than much of the Portland metro area. Our community offers a unique quality of life compared to others in the region, one that will attract those who believe their business will benefit from being located here. If Newberg provides suitable sites for these industry clusters, there is a reasonable likelihood that they will choose our community.

Yamhill County Agri-Business

In June 2009, Barney & Worth, Inc. prepared the *Yamhill County Agri-Business Economic and Community Development Plan: Summary Report* for Yamhill County. The plan assessed the existing state of agriculture and agri-tourism in the County, and assessed future opportunities for growth. According to the report, Nursery and Greenhouse Crops comprise 45.2% of the value of agricultural production in the county.

Table 12- 1: Yamhill County Value of Agricultural Production, 2007

Yamhill County Value of Agricultural Production, 2007	Value ($000)	Percent of Total
All Crops		
Nursery & Greenhouse Crops	$133,724	45.2%
Grass & Legume Seeds	$56,889	19.2%
Nuts & Tree Fruit	$24,684	8.3%
Small Woodlots and Christmas Trees	$13,204	4.5%
Grain & Hay	$9,600	3.2%
Vegetable & Truck Crops	$3,185	1.1%
Other Crops (Wine Grapes)	$13,387	4.5%
Sub total	$254,673	86.0%
All Livestock		
Dairy Products	$20,482	6.9%
Poultry	$9,780	3.3%
Cattle	$6,267	2.1%
Other Animal Products	$4,903	1.7%
Sub total	$41,432	14.0%
All Crops and Livestock	**$296,105**	

Source: Oregon Agricultural Information Network.

The report also recognizes great opportunities in the agri-tourism sectors. Key findings from the report include:

> *For 150 years and longer, Yamhill County has benefitted from its strong agricultural base. Even now, the agriculture sector produces $300 million in annual sales (not including food processing and wine). The great strength of Yamhill County agriculture is its diversity. Local agricultural production remains strong in many profitable sub-sectors, with fast growing horticulture accounting for nearly half of total sales. The future for Yamhill County agriculture looks bright.*
>
> *Alongside horticulture and traditional crops, the Yamhill County wine industry has emerged over the past 30 years to become headline news nationally and internationally. Yamhill's name – like Napa, Sonoma, Bordeaux and Burgundy – has become synonymous with its wine. With the wine sector continuing to flourish, new wineries opening each year, more acres planted with grapes, this trend will also be sustained in Yamhill County.*
>
> *Coupled with the area's scenic beauty (thanks in part to agriculture!), the wineries assure that Yamhill County will continue to host many visitors. Estimates already place that number at 1.5 million per year who visit local wineries. Half of those visitors come from the Portland area, and the other half are from the western states and all over the U.S. and world.*
>
> . . .

> *Yamhill County – with its solid agricultural base, wine destination status, proximity to the metro area, and stunning beauty – also appears to be on the verge of something great. With the opening of the Allison resort in Newberg, along with other new attractions, there's an opportunity just now to pick priorities and adopt strategies that move the community forward*[27].

The plan identifies a number of key ingredients to secure the future for Yamhill County's agriculture and tourism sectors:

> Shared vision for Yamhill County's future. *Yamhill County communities and citizens need to reach agreement on values and priorities for the future. Tourism is here to stay – now is the critical time to plan, safeguarding quality of life for local residents and maximizing the potential for community benefits.*
>
> More lodging facilities. *To capture the economic benefits of the estimated 1.5 million annual visitors to wine country, Yamhill County must have more high amenity overnight accommodations.*
>
> More attractions. *Wineries and hotels alone aren't enough to hold every visitor's attention and assure repeat visits. Wine tourism is seasonal and cyclical, and other destinations and attractions will be needed to complement Yamhill County wine country and fill out the tourism calendar: arts and culture, entertainment, historic sites, parks and trails, golf, outdoor adventures, shopping.*
>
> Rezoning to accommodate prototype development projects. *Analysis has revealed the types of representative projects needed to support agriculture and tourism lack adequate sites. Rezoning enables communities to place these projects where they "fit" and provide benefits to the community.*
>
> Site assembly. *Preparing land for development, from initial site selection through planning and marketing, is site assembly. To assure job growth and allow for new investment, communities will need to be proactive in identifying an adequate supply of properly sized, suitably zoned development sites and be active participants in the development process.*
>
> County-wide infrastructure strategy. *The most pressing problem for every community is infrastructure. Regional cooperation in Yamhill County to jointly plan for the future and secure adequate drinking water supplies can be a model for cost saving inter-agency arrangements for other services. Moving ahead with a reprisal solution for drinking water is critical for many Yamhill County communities.*

[27] *Yamhill County Agri-Business Economic and Community Development Plan: Summary Report* Prepared for: Yamhill County, Oregon, Barney & Worth, Inc., in association with Globalwise, Inc., E.D. Hovee & Company, LLC, and Spencer & Kupper, page 41.

> Coordinate opportunity sites / services. *The shortage of suitable development sites and scarcity of funds require strategic thinking. Which key sites and development opportunities must have adequate services available?*[28]

Regional Industrial Land Availability

In 2001, OTAK prepared the *Regional Industrial Land Study for the Portland – Vancouver Metropolitan Area.* This report inventoried the available industrial land in the area. That report concluded that the region would have a need for 6,900 acres of buildable industrial land for the period 2000-2025 [29]. The study found that, while the region had enough land, most of it suffered from development constraints and lack of services. The report found that the region had only 2,387 acres of ready-to-develop unconstrained land, only about 1/3 of the projected need.

Recognizing the severe shortage of industrial land in the region and the state, in 2003 Governor Kulongoski ordered the Community Solutions Team to help establish certified shovel ready industrial sites, and appointed the Industrial Lands Taskforce. In its report,

> *The Taskforce concluded that there is a significant lack of certain types of project ready industrial land[1] in certain parts of the state. This conclusion is supported by the findings of the Portland-area Regional Industrial Lands Study (RILS), the HB3557 committee report, testimony received at Taskforce hearings, and the direct experience of Taskforce members. The Taskforce also concluded that the many jurisdictions lack a 20-year supply of industrial land.*[30]

In addition:

> *Although the committee selected the following five highly marketable sites, the industrial land supply in the METRO region remains critically low. Identifying these five sites is only a first step.* ***More industrial sites, especially those that could accommodate a large employer, are needed****.*[31] [Emphasis added]

The report also discussed the lack of large industrial sites in appropriate locations:

> *<u>Unavailable Land in Strategically Significant Employment Areas</u>*
> *Given the Portland metropolitan area's economic significance to the state, the committee expressed concern that the selection pool of 55 sites forwarded to them from OECDD's Regional Development Officers (RDOs) included very few large industrial sites along I–5, between the Washington border and Salem. This occurred because there is a lack of land available for industrial development in this area. Land located at existing freeway interchanges, such as the Stafford District at I–205 and Stafford Road, Langdon Farms*

[28] Barney & Worth, Inc., page 43.
[29] *Phase 3: Regional Industrial Land Study for the Portland – Vancouver Metropolitan Area* prepared by Otak, Inc., in association with ECONorthwest and Parametrix, October 31, 2001
[30] *Positioning Oregon for Prosperity*, Report to Governor Kulongoski, prepared by the Industrial Lands Taskforce, September 2003
[31] *Industrial Lands Advisory Committee Report*, December 15, 2003

> *at the I–5 and Charbonneau exit, and the I–5 Donald/Aurora exit are logical market driven locations for large scale industrial and employment intensive development.* [32]

While some efforts in the region have been made since that time to address this significant lack of industrial land in the region, the shortfall remains high and the needs have grown.

Newberg Population Profile

Historic and Future Growth Trends

Newberg has grown steadily through the last few decades. Table 12-1 shows the population growth over time since 1960.

Table 12- 2: Newberg Census Populations

Year	Population
1960	4,204
1970	6,507
1980	10,394
1990	13,086
2000	18,064

Source: U.S. Census Bureau

Newberg's population as of July 1, 2009 was estimated to be 23,150[33]. As of July 1, 2009, the Urban Growth Boundary has an estimated population of 23,582[34].

Between 1990 and 2000, Newberg's growth rate was 38%. In comparison, Newberg's growth rate was greater than the Portland Metropolitan area's at 27%, the state of Oregon at 20%, and Yamhill County's at 30%[35]. It should be noted that Yamhill County, where Newberg is located, is part of the Portland Metropolitan Statistical Area (PMSA). While Oregon's population in general is not expected to grow in the foreseeable future as fast as in the 1990s, the Portland metropolitan area should grow faster than the state as a whole.

In 2004, the Newberg City Council appointed an ad hoc advisory committee to look at the community's future land needs. To accomplish this task, the Ad Hoc Committee for Newberg's Future needed to forecast the community's future population. A consultant working with the Committee developed three growth forecast scenarios for the Committee to consider: low, medium, and high. The Committee selected the medium growth scenario as the most likely to occur. These population projections have been adopted into the Comprehensive Plan[36], coordinated with Yamhill County as required by ORS 195.036, and acknowledged by the State. The following table shows the forecasted future growth for Newberg:

[32] *Industrial Lands Advisory Committee Report*, December 15, 2003
[33] Population Research Center, Portland State University
[34] Newberg Planning Division
[35] U.S. Census Bureau
[36] Adopted by Ordinance 2005-2626, November 21, 2005

Table 12- 3: Population Forecasts - Newberg Urban Area[37]

Year	2000	2005	2010	2025	2030	2040
Forecasted Population	18,438	21,132	24,497	38,352	42,870	54,097

Source: Newberg Comprehensive Plan

Through 2008, these projections have been remarkably accurate. The 2008 PSU estimates are within 11 persons of the population estimates made in the comprehensive plan. The 2009 estimates are still within about 200 people of the projections, thus the adopted population forecasts can still be considered reliable.

Age characteristics

Table 12- 4 below compares Newberg's population by age categories with the populations of Yamhill County, the Portland Metropolitan Statistical Area (PMSA), and the state of Oregon. The table also compares the median age for each geographical area.

Table 12- 4: Comparative Age Characteristics

Age Categories	Newberg	Yamhill County	PMSA	Oregon
Under 5 years	7.6%	6.4%	6.7%	6.3%
5 to 9 years	3.5%	5.4%	6.9%	6.4%
10 to 14 years	8.9%	8.0%	6.7%	6.4%
15 to 19 years	9.7%	7.9%	6.5%	6.7%
20 to 24 years	12.1%	8.4%	6.0%	6.6%
25 to 34 years	13.0%	13.9%	14.9%	13.9%
35 to 44 years	15.4%	13.4%	15.3%	13.9%
45 to 54 years	11.9%	14.4%	15.4%	15.1%
55 to 59 years	5.7%	6.4%	6.7%	6.9%
60 to 64 years	2.4%	3.9%	4.5%	4.9%
65 to 74 years	4.4%	5.6%	5.3%	6.5%
75 to 84 years	3.5%	4.2%	3.5%	4.5%
85 years and over	2.0%	1.9%	1.6%	1.9%
Median age (years)	30.6	34.9	36.3	37.6

Source: U.S. Census Bureau, 2005-2007 American Community Survey 3-Year Estimates

The data shows that Newberg's population is younger that the comparative populations, especially in the 20 to 24 year old category. This is likely due to the presence of students attending George Fox University. In general, our population over 45 years of age is somewhat lower than the comparative populations.

Educational Attainment and Income

Table 12- 5 below compares the educational attainment of the Newberg population over 25 years of age compared with Yamhill County, the PMSA, and the state of Oregon. Newberg has approximately the same amount of residents with high school diplomas as the comparative areas; however, there are fewer residents with a Bachelor's degree or higher when compared to the

[37] Population forecasts are for the Newberg Urban Growth Boundary.

PMSA and the state. This may indicate that, although Newberg has a strong workforce in many areas, it does not have as many of the highly skilled professional jobs available that would require a Bachelor's degree.

Table 12- 5: Comparative Educational Attainment

	Newberg	Yamhill County	PMSA	Oregon
Less than 9th grade	3.9%	7.0%	4.1%	4.6%
9th to 12th grade, no diploma	7.4%	8.2%	6.7%	7.9%
High school graduate (includes equivalency)	27.9%	31.8%	24.4%	26.9%
Some college, no degree	29.2%	24.3%	25.2%	25.3%
Associate's degree	7.2%	6.6%	7.7%	7.7%
Bachelor's degree	15.2%	13.8%	20.6%	17.6%
Graduate or Professional degree	9.1%	8.2%	11.3%	10.0%
Percent High School Graduate or Higher	89%	85%	89%	88%
Percent Bachelor's Degree or Higher	24%	22%	32%	28%

Source: U.S. Census Bureau, 2005-2007 American Community Survey 3-Year Estimates

Table 12- 6 compares the household income levels of the Newberg population over 25 years of age compared with the state of Oregon, Yamhill County and the PMSA. Newberg has a high percentage of households in both the $35,000 to $49,999 and the $50,000 to $74,999 income ranges. As seen below in Figure 12-2, Newberg has high employment in the areas of construction, retail, manufacturing, and educational services; industries whose pay would typically fall into these ranges.

Table 12- 6: Comparative Household Income

	Newberg		Yamhill County		PMSA		Oregon	
Household Income*	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than $10,000	483	7.1%	2,378	7.2%	52,888	6.5%	108,551	7.5%
$10,000 to $14,999	552	8.1%	2,142	6.5%	39,721	4.9%	87,317	6.0%
$15,000 to $24,999	513	7.5%	3,189	9.7%	79,348	9.7%	168,261	11.6%
$25,000 to $34,999	819	12.0%	3,748	11.4%	85,031	10.4%	169,167	11.7%
$35,000 to $49,999	1,469	21.5%	5,462	16.6%	119,523	14.6%	225,677	15.6%
$50,000 to $74,999	1,430	20.9%	6,668	20.3%	166,437	20.3%	287,225	19.8%
$75,000 to $99,999	1,087	15.9%	4,480	13.6%	108,932	13.3%	174,531	12.1%
$100,000 to $149,999	363	5.3%	3,257	9.9%	103,824	12.7%	145,655	10.1%
$150,000 to $199,999	101	1.5%	772	2.4%	32,632	4.0%	42,738	3.0%
$200,000 or more	20	0.3%	737	2.2%	29,570	3.6%	38,287	2.6%

* In 2007 Inflation Adjusted Dollars
Source: U.S. Census Bureau, 2005-2007 American Community Survey 3-Year Estimates

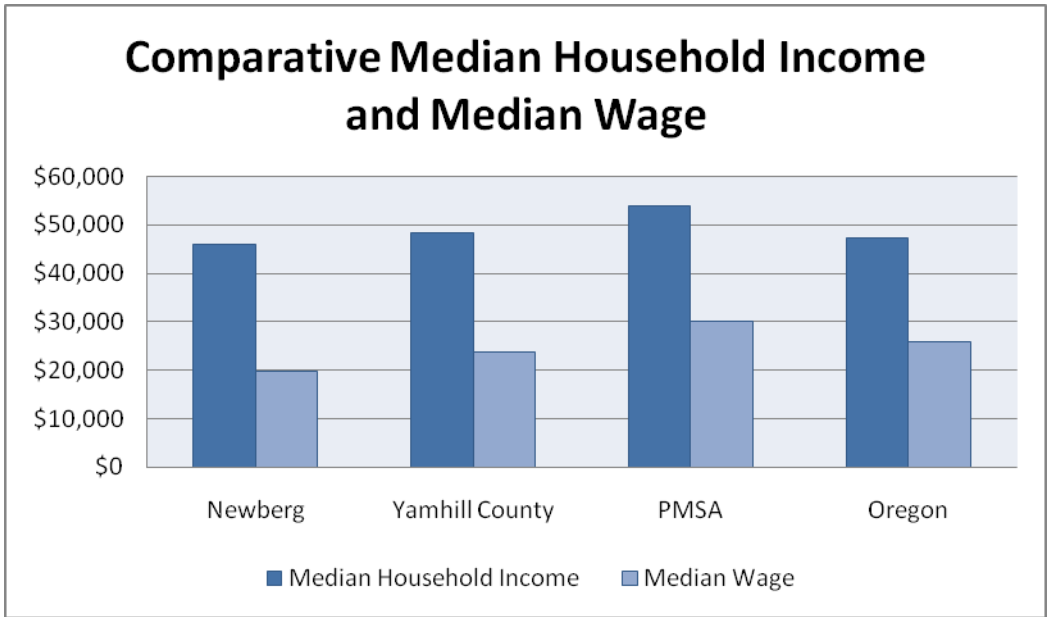
Table 12- 7 compares the median household income and median wages for Newberg, Yamhill County, the PMSA, and the state of Oregon. Figure 12- 1graphically shows that Newberg is behind Yamhill County and the PMSA in median household income and median wage.

Table 12- 7: Comparative Median Household Income and Median Wages

	Newberg	Yamhill County	PMSA	Oregon
Median Household Income	$46,066	$48,485	$53,935	$47,385
Median Wage	$19,821	$23,848	$30,094	$26,002
Male, Full-Time, Year-Round	$44,205	$41,148	$47,803	$42,676
Female, Full-Time, Year-Round	$29,063	$31,680	$36,563	$33,017

Source: U.S. Census Bureau, 2005-2007 American Community Survey 3-Year Estimates

Figure 12- 1: Comparative Median Household Income and Median Wage



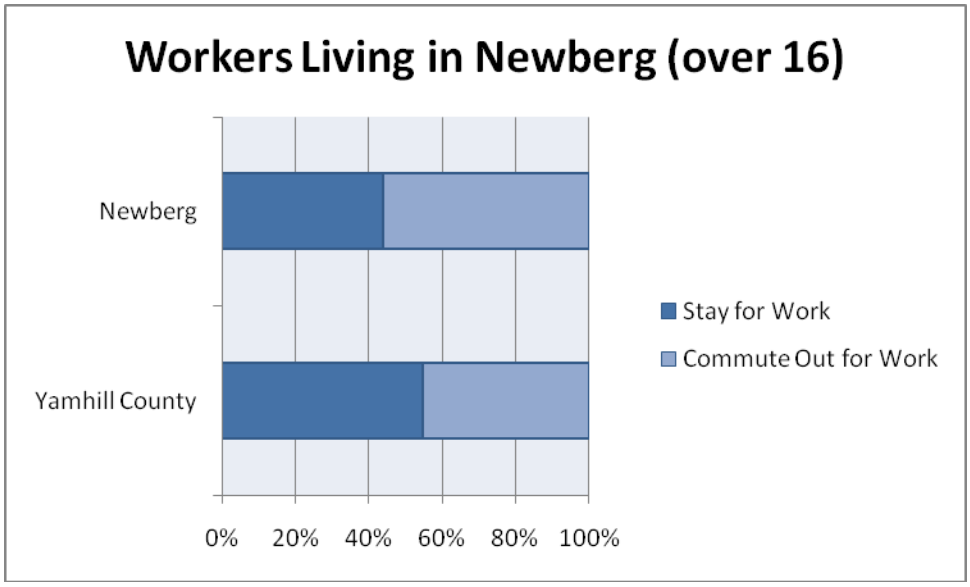
Source: U.S. Census Bureau, 2005-2007 American Community Survey 3-Year Estimates

Comparing the previous education and income tables reveals a very interesting profile of the Newberg community. The Newberg population has a smaller percentage of 4-year college and graduate degrees than the state or the PMSA; however, Newberg is also home to George Fox University. This indicates that George Fox University graduates are not remaining in Newberg, whether by choice or by other factors such as limited available job opportunities. Newberg also has a lower median household income and median wage than Yamhill County, the PMSA and the state. This may be related to the fact that Newberg has fewer citizens with higher education. As shown in Figure 12-2 on page 12-20, Newberg has a high percentage of workers in educational services and manufacturing jobs, both historically lower-paying professions (with the exception of highly skilled manufacturing jobs).

Commuting Patterns

The 2006-2008 American Community Survey 3-Year Estimates indicate that approximately 56% of workers over age 16 that live in Newberg travel outside of Newberg for work. Of those people that commute outside of Newberg for work, approximately 55% of workers stay in Yamhill County and approximately 45% of workers commute to other counties. The data indicates that the mean travel time for a worker leaving Newberg for work is 21 minutes. Given Newberg's relatively close proximity to the Portland metropolitan area, it is reasonable to assume that many of the workers leaving Newberg for work are going to one of the nearby Portland suburbs (which are located in Washington, Multnomah and Clackamas Counties). The following table shows this commuting pattern.

Table 12- 8: Place of Work for Workers Living in Newberg



Source: 2006-2008 American Community Survey 3-Year Estimates

The Oregon Employment Department has statistics regarding commuting patterns within Yamhill County. Of all the workers that live in Yamhill County, approximately 12% work in Newberg. Approximately 31% of all workers that live in Yamhill County commute to the nearby Portland metropolitan area counties (Washington, Multnomah and Clackamas Counties); a statistic that is similar to the number of Newberg workers commuting out to these counties. The Newberg number is likely higher due to its proximity to these neighboring counties relative to the rest of the Yamhill County population.

Reasons for these commuting patterns are likely to be manifold, and may include:

- Lower housing costs in Newberg compared to the Portland area.
- More employment opportunities in the Portland area.
- Desire to live in a community like Newberg with a high quality of life and sense of community, rather than a "same as everywhere else" type of Portland area suburb.

Newberg would like to provide more local employment opportunities, thus reducing travel time and distance for existing and future residents. In short, Newberg would like to reverse trends towards "bedroom community" status by providing a greater variety of local employment opportunities. To achieve this objective, Newberg must provide industrial sites with characteristics that capitalize on Newberg's comparative economic advantages.

Newberg Employment Characteristics

Historic Economy

Settlement of our region by people of European ancestry began a mostly agricultural economy for the area. As the region developed, Newberg slowly became the commercial center for the eastern end of Yamhill County and it remains so to this day. Evidence of this development is

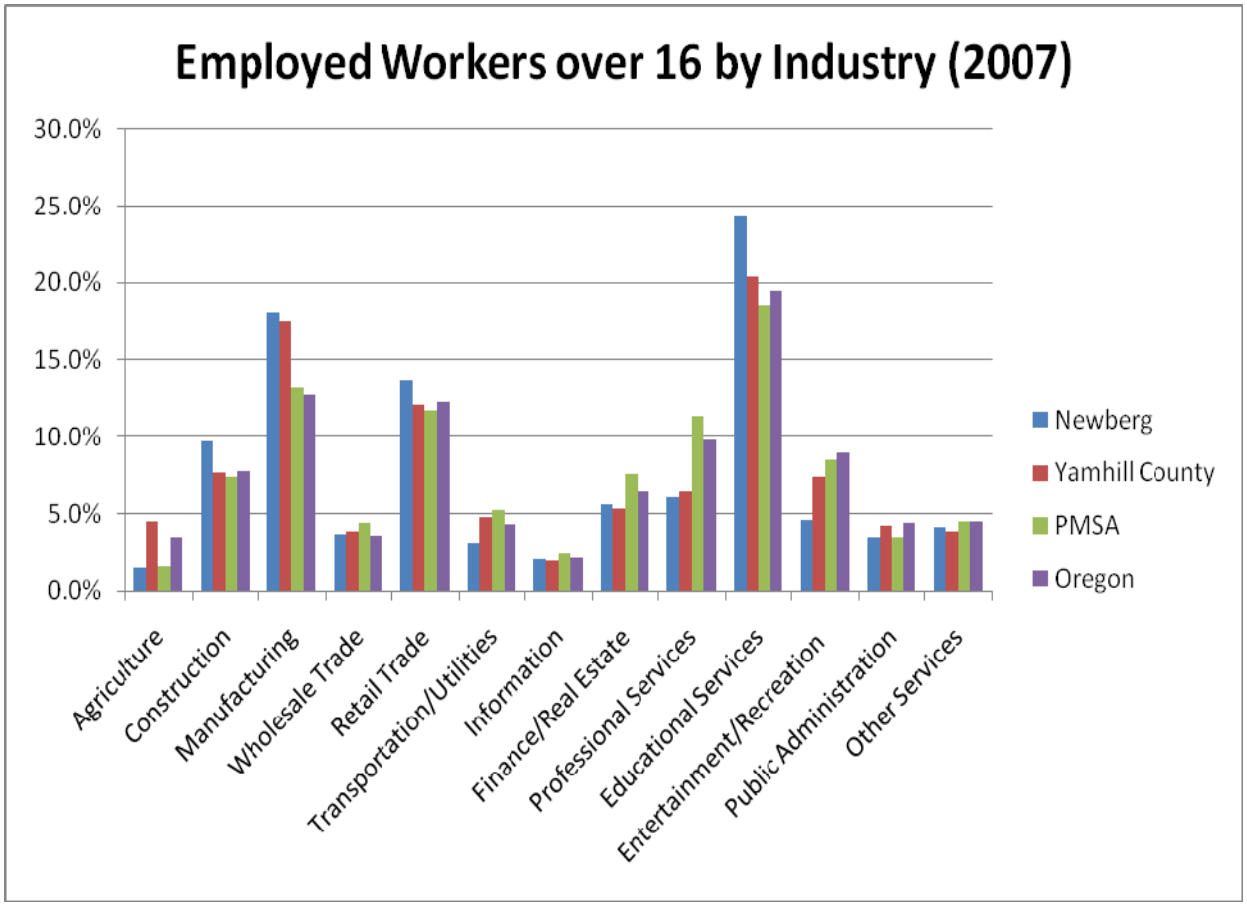
expressed through Newberg's Central Business District, which consists of many early twentieth century buildings constructed in a high-density pattern.

The advent of the car as a primary mode of transportation for people brought about commercial development pattern of a lower density. Most of this type of development is situated along Highway 99W in the eastern section of the city.

Current Economy

Newberg has a diverse economic base. This diversity, along with the types of businesses, has provided Newberg with a reasonably stable economy. Figure 12-2 shows how Newberg compares with Yamhill County, the PMSA and the state for percentage of workers by industry. As the chart shows, Newberg has a high percentage of workers in construction, manufacturing, retail trade, and educational services.

Figure 12- 2: Employed Workers over 16 by Industry



Source: U.S. Census Bureau, 2005-2007 American Community Survey 3-Year Estimates

Table 12-9 shows the actual employment by industry for Newberg in 2007, as reported by the Oregon Employment Department.

Table 12- 9: 2007 City of Newberg Annual Average Employment by Industry

Industry	Average Annual Employment	Total Payroll	Average Annual Wage
Agriculture, Forestry, Fishing and Hunting	142	$4,351,630	$30,645
Construction	773	$31,068,987	$40,193
Manufacturing	2,608	$135,015,712	$51,770
Wholesale Trade	103	$4,869,681	$47,278
Retail Trade	933	$25,761,682	$27,612
Transportation & Warehousing	167	$4,809,037	$28,797
Information	57	$2,148,418	$37,692
Finance & Insurance	169	$7,637,067	$45,190
Real Estate, Rental & Leasing	110	$2,693,296	$24,485
Professional, Scientific & Technical Services	199	$8,025,799	$40,331
Administrative Support, Waste Management, Remediation	207	$4,862,935	$23,492
Education Services	1,349	$45,973,472	$34,080
Health Care & Social Assistance	1,304	$45,422,729	$34,833
Arts, Entertainment & Recreation	148	$2,012,923	$13,601
Accommodation & Food Services	796	$10,227,414	$12,849
Other Services	397	$7,773,184	$19,580

Source: Oregon Employment Department

While employment data is readily available at the County level, specific employment data at the city level is less available, and has some limitations. The most recent data available for Newberg at the end of 2009 was 2007 data. Certain data is confidential and cannot be reported at the city level, including utility, management, and local government numbers. However, more recent data for Newberg can be derived by using certain data assumptions to estimate employment by

industry through 2009[38]. Table 12- 10 below shows the estimated Newberg employment by industry for 2007-2009.

Table 12- 10: Estimated Newberg Employment by Industry 2007-2009

Industry	2007	2008	2009
Construction	773	642	390
Manufacturing	2,608	2,557	2,201
Wholesale Trade	103	97	73
Retail Trade	933	930	841
Transportation, Warehousing & Utilities	178	181	181
Information	57	54	45
Financial Activities	279	270	241
Professional & Business Services	430	407	299
Education & Health Services	2,653	2,766	3,285
Leisure & Hospitality	944	1,002	1,018
Other Services	397	413	409
Government	170	174	183
Total	**9,169**	**9,494**	**9,165**

Source: Oregon Employment Department, 2009, Newberg Planning Division

[38] The 2007-2009 employment data was derived using the following assumptions:

- Utility employment was derived as being 6.6% of the total "Transportation, Warehousing, & Utility" employment in Newberg. This is equal to the ratio in Region 15, the only region of the three surrounding regions (Region 2, Region 3, and Region 15) where data was available.
- Government employment was derived as the total FTE for the City of Newberg for that year, plus 5% for some County, State or other government jobs in Newberg.
- Management employment was derived as being 11.9% of the total Professional and Business Service employment in Newberg. This is equal to the ratio in Yamhill County, 2008.
- 2008 and 2009 employment estimates were derived by applying the same rate of change to each industry as in Yamhill County for those years.

The following is a list of the top employers located within the urban growth boundary of Newberg in 2009.

Table 12- 11: Newberg Top Employers 2009

Employer	Average Employment	Product Description	Industry Cluster
A-dec	978	Dental equipment	Manufacturing
George Fox University	560	Higher Education	Higher Education
Newberg Public Schools	560	K-12 Education	Education
SP Newsprint Company	324	Newsprint	Manufacturing
Providence Newberg Medical Center	255	Health Care	Health Care
Suntron[39]	220	Electronics (circuit boards, modular parts, cable assembly)	Manufacturing
Fred Meyer, Inc.	210	Groceries, retail	Retail
City of Newberg	181	Government	Government
The Allison Inn and Spa	165	Hotel and spa	Wine/Tourism
Friendsview Retirement Center	149	Continuing care retirement community	Health Care
PPM Technologies	109	Food processing machinery	Manufacturing
Hazelden Springbrook	100	Alcohol and drug treatment	Health Care
Climax Portable Machine Tools	95	Portable machine tools	Manufacturing
Safeway	80	Groceries, pharmacy	Retail
Harris Thermal Transfer Products	73	Heat exchanger manufacturing	Manufacturing
Chehalem Youth & Family Services	73	Child and family services	Health Care
Dental Components, Inc.	60	Dental equipment	Manufacturing
Ushio Oregon, Inc.	53	High intensity lamps	Manufacturing
A.R.E. Manufacturing	51	Dental equipment and boat parts	Manufacturing

Source: Chehalem Valley Chamber of Commerce; Reuters

Newberg has a higher than average manufacturing employment base. The list of companies in the table above shows that many of the community's businesses are industrial in nature. Education (e.g. George Fox University) and health care (e.g. Providence Newberg Hospital) are also big components of Newberg's economic structure. With the addition of the Allison Inn & Spa, the wine industry is beginning to make a larger impact, along with the associated tourism

[39] Suntron announced plans to close Newberg operations in 2010.

industry: bed and breakfasts, restaurants, art shops, wine-tasting rooms.

Retail Conditions

Newberg's close proximity to the Portland metro area and relatively low retail opportunities results in retail dollar "leakage" from the community. This means that fewer retail dollars stay in the community and continue to circulate within the local population. Support for this assertion of retail dollar leakage can be demonstrated through some simple calculations. By taking the total annual retail sales numbers of area, divided by the area's population, one gets a total annual retail spending per capita in that community. Using this formula, the following is a list of the annual retail sales per capita in population centers within Oregon.

Table 12- 12: Population and Retail Sales

Population Center	Annual retail sales per capita
Newberg	$9,462
McMinnville	$11,798
Ashland	$7,495
Medford	$21,470
Washington County	$12,386
Salem	$13,807
Bend	$22,933
Pendleton	$12,515
Eugene/Springfield	$14,132
Oregon	$10,542

Source: U.S. Census Bureau, 2000

Newberg's local retail spending is the below the state average. McMinnville's retail spending is higher than Newberg, but also has more shopping opportunities. Ashland and Medford's relationship is much like Newberg with the Portland metro area, with many Ashland retail dollars likely to be going to Medford businesses. Many other commercial centers around Oregon, like Salem, Bend, Pendleton and Eugene/Springfield also appear to attract more retail dollars per capita that the state average.

It is acknowledged that this calculation is simplistic. Many other variables would affect a more thorough analysis, such as total income, disposable income, geographic boundaries and population dispersion. However, it is probable that the biggest factor in retail dollar leakage remains the fact that small towns with limited shopping opportunities will always lose retail dollars to nearby urban centers.

Outside of Newberg, agriculture is still an important industry to the area's economy. The wine/tourism industry has an especially large impact upon Newberg. Many new businesses, such as restaurants, bed & breakfasts, art galleries, and gift shops, have been established with recognition that tourists would be a principal customer. The Yamhill Valley (consisting of portions of Yamhill and Polk County) is the heart of Oregon's $576 million wine industry, with

about 200 vineyards and 85 of Oregon's 200 wineries[40]. The wine industry in Yamhill County has grown exponentially over the last few decades.

III. Assessment of Community Economic Development Potential

Regional Employment Projections

In November 2009, the Oregon Employment Department issued employment projections for 2008-2018. These projections considered the recession in the late 2000's, and projected a slow recovery over the coming decade. Table 12- 13 shows the combined employment projections for Region 2 (Multnomah and Washington Counties), Region 3 (Marion, Yamhill, and Polk Counties), and Region 15 (Clackamas County). The combined projection was used because Newberg is almost centrally located within this six county region.

Table 12- 13: Combined Employment Projection for Regions 2, 3, and 15, 2008-2018 (Multnomah, Washington, Marion, Polk, Yamhill, & Clackamas Counties)

Industry	2008	2018	% Change
Construction	57,410	58,600	2.07%
Manufacturing	121,270	119,200	-1.71%
Wholesale Trade	55,840	61,100	9.42%
Retail Trade	108,630	117,700	8.35%
Transportation, Warehousing & Utilities	36,480	38,300	4.99%
Information	23,500	24,200	2.98%
Financial Activities	68,970	72,300	4.83%
Professional & Business Services	81,720	88,700	8.54%
Education & Health Services	94,490	107,500	13.77%
Leisure & Hospitality	79,610	86,200	8.28%
Other Services	61,890	65,000	5.03%
Government	114,640	120,300	4.94%
Total	**904,450**	**959,100**	**6.04%**

Source: Oregon Employment Department.

Newberg Employment Projections

Newberg employment projections for 2010-2040 were made consistent with the "safe harbor" methodology described in OAR 660-024-0040(9)[41]. This methodology allows a local

[40] *News-Register*

[41] OAR 660-024-0040 (9) states: *The following safe harbors may be applied by a local government to determine its employment needs for purposes of a UGB amendment under this rule, Goal 9, OAR chapter 660, division 9, Goal 14 and, if applicable, ORS 197.296.*
(a) A local government may estimate that the current number of jobs in the urban area will grow during the 20-year planning period at a rate equal to either:
(A) The county or regional job growth rate provided in the most recent forecast published by the Oregon Employment Department; or

government to estimate that the current number of jobs in the urban area will grow either at a rate equal to the Oregon Employment Department regional job forecast rates, or at a rate equal to the population growth rate for the urban area. Future employment projections for the Newberg urban area were made using a combination of these allowed methodologies.

Retail trade and leisure & hospitality employment was projected to grow according to Newberg population growth. This was done because the need for retail services typically grows along with population, and also because of Newberg's strong potential for leisure & hospitality employment growth in its targeted industry cluster of wine/tourism.

For other industries, employment was projected to grow for the 2008-2018 period at the same rate as the projected six-county change shown in Table 12- 13 above. For employment projections beyond 2018, employment was projected to grow at the same rate as the projected population growth. This rate is in accordance with the safe harbor provision stated above, and allows Newberg to plan adequately for the 20-year planning horizon to 2030. This is essential for Newberg to maintain its desired jobs-housing balance into the future and to avoid becoming solely a bedroom community.

Table 12- 14: Projected Newberg Employment through 2040

Industry	2008	2009	2018	2020	2025	2030	2035	2040
Construction	642	390	656	700	798	892	1,005	1,125
Manufacturing	2,557	2,201	2,514	2,685	3,057	3,417	3,851	4,312
Wholesale Trade	97	73	106	113	129	144	162	181
Retail Trade	930	841	1,124	1,201	1,367	1,529	1,723	1,929
Transportation, Warehousing & Utilities	181	181	191	204	232	259	292	327
Information	54	45	56	60	68	76	86	96
Financial Activities	270	241	283	303	345	385	434	486
Professional & Business Services	437	321	474	507	577	645	727	814
Education & Health Services	2,766	3,285	3,147	3,361	3,827	4,278	4,821	5,398
Leisure & Hospitality	1,002	1,018	1,361	1,454	1,655	1,850	2,085	2,335
Other Services	413	409	434	463	528	590	665	744
Government	183	175	192	205	233	261	294	329
Total	**9,533**	**9,180**	**10,536**	**11,255**	**12,815**	**14,325**	**16,145**	**18,077**
Cumulative from 2009		-	1,357	2,075	3,636	5,145	6,965	8,897

(B) The population growth rate for the urban area in the adopted 20-year coordinated population forecast specified in OAR 660-024-0030.
Note that the employment projections made are for a longer period than the 20-year period. Thus, employment projections beyond this 20-year period are not currently a "safe harbor" suitable for UGB amendments, though they could become a "safe harbor" for future UGB amendments.

Newberg's Comparative Advantages and Disadvantages

This section, Assessment of Community Economic Development Potential (660-009-0015-4), determines the types and amounts of industrial and other employment uses likely to occur in the planning area, relating to the results of the Trends Analysis and Inventory, and considers the planning area's economic advantages and disadvantages.

Comparative Advantages

1. Small town quality of life
    a. Relatively affordable housing
    b. Attractive rural setting in heart of wine country
    c. Attractive historic downtown
    d. Full service city separate from Portland metropolitan area with deep sense of community and history.
    e. High level of community engagement

2. Access to quality education and skills training
    a. George Fox University is very highly regarded. George Fox is listed among the top 100 colleges in the United States in *Forbes'* 2009-10 ranking of "America's best colleges." *U.S. News and World Report* named the University on its list of "Best National Universities," and was the only Christian college in the Pacific Northwest to make this list. The *Report* also cited an academic reputation survey of high school counselors that ranked George Fox University among the top 100 national universities. Moreover, it reported that more Portland-area valedictorians and straight-A seniors enroll at George Fox University than at any other private college in Oregon. *The Princeton Review* lists George Fox as a "Best in the West" selection.
    b. Portland Community College recently passed a bond measure that will fund the construction of a branch campus in Newberg. The College will offer classes in the community in the fall of 2010. The College is expected to offer a wide range of academic and technical skills training that will serve the needs of local citizens and businesses alike.
    c. The Newberg School District has a higher percentage of Newberg students that meet or exceed state standards in reading, mathematics, writing and science than state averages. Average student SAT scores are 1567 compared to Oregon average of 1550 and national average of 1511.

3. Established and growing industry clusters
    a. The percentage of employment in the manufacturing sector in Newberg is higher than state average. Average wage is high in this sector.
    b. Dental equipment manufacturing cluster is very strong, including a world leader in this industry.
    c. The new $68.5 million Providence regional medical center has created hundreds of highly-skilled, well-paying job and solidified health care as one of Newberg's target industries. The hospital has also spurred development of retirement and health care facilities for seniors.

d. The wine/tourism industry in Yamhill County is world-renowned. Given Newberg's strategic location as the eastern gateway to the area's wine country from the Portland metropolitan region, this industry is expected to experience continued strong growth. Total direct spending for tourism in Yamhill County has gone from $29.1 million in 1991 to $60.7 million in 2003 [42]. Businesses such as restaurants, bed and breakfasts, wine shops, and art galleries are benefiting from this rising industry and are actively pursuing these customers. In particular, Newberg's historic downtown has experience significant revitalization in recent years, much of it due to the increasing impacts of this industry. In 2009, the Allison, a large luxury inn and spa targeting wine tourists, was opened. This development was a significant investment in this local industry and a very demonstrative statement in its future.

4. Strong local support for business and employment opportunities
   a. Newberg commits staff resources to retain existing business and recruit new businesses .
   b. Newberg is commitment to planning "shovel ready" industrial sites.
      i. Sportsman Airpark Master Plan preserves the functional aspects of this airport. It also reserves developable industrial land for businesses that would benefit from having close access to airport services.
      ii. South Industrial Area Master Plan provides for the development of new industrial sites of various sizes that have good transportation access, especially to Interstate 5.
   c. The Chehalem Valley Chamber of Commerce has high membership and very active in supporting members, business, and industry.
   d. Coordination with County ensures that land outside city limits is reserved for intended employment uses and not converted to residential or commercial uses

5. Proximity to Portland metropolitan region
   a. Newberg has access to large market area, including the Portland-Vancouver area. This also provides access to other regions, including the Seattle, the Bay area and even Asian markets.
   b. Newberg has access to major state highways: Highway 99W and 219, and as little as 15 minute access to I-5.
   c. Newberg has access to national/international transportation facilities, including air and water transportation facilities at the Port of Portland.
   d. Newberg has strong relationships with other economic development organizations in the region.

6. Future Newberg-Dundee Bypass
   a. The Newberg-Dundee Bypass is included in Oregon's Highway Plan. The location EIS has been approved. Plans are currently underway to construct a first segment of the bypass within 5-10 years.
   b. The Bypass will provide improved transportation facilities that will benefit existing industrial users (airport, Highway 219) in south Newberg by allowing

[42] Dean Runyan Associates

traffic from those areas to access Highway 99W and SW Portland area markets without routing truck traffic through downtown.

c. The Bypass will provide improved access to Newberg and the Portland region from I-5 (via Highway 219).
d. The Bypass will reduce traffic in downtown Newberg and facilitate the objective of having a pedestrian-oriented city and retail and service center.
e. The Bypass will provide improved transportation facilities near flat serviceable land in south Newberg.

7. Oregon's Statewide Planning Goals. Economic development in Oregon is strongly influenced by many of these goals. In particular, Goal 9 requires cities to identify comparative advantages, targeted employment opportunities and site requirements and to reserve land for long-term industrial uses. Compared to national and international competitors, this required planning work can help ensure that Newberg's efforts in the retention and recruitment of businesses is targeted, efficient and effective.

Comparative Disadvantages

The global economy provides strong competition for local, regional and national manufacturers. Many other countries, such as China and India, are attracting manufacturing facilities through a growing, trained workforce with lower, average wages than this region. Some of Newberg's disadvantages in competing in a regional and national marketplace include:

1) Transportation and access issues:
   a. Congestion on Highway 99W and travel times to Metro area markets slows shipments of goods and material, employees, and customers.
   b. Truck traffic on Highway 99W prevents Newberg's historic downtown from achieving its full potential by creating an environment that is less-than pedestrian friendly.
   c. Although Newberg has easy access to I-5 via Highway 219 and McKay Road, the Donald/Aurora Interchange at I-5 has access and capacity issues that will likely require a reconfiguration or some other interchange redesign to handle increased traffic capacity from future development in the region.
   d. The Newberg-Dundee Bypass is a significant future advantage to Newberg. However, ODOT may want to limit development near the Bypass interchange with Highway 219 in the future to ensure that adequate volume and capacity standards are met. Development limitations may require trip caps or a restriction on certain high-traffic generating uses.

2) In 2009, Newberg lacks suitable industrial sites to meet needs of targeted employment opportunities:
   a. Many existing industrially zoned parcels are constrained by size, topography, or height restrictions.
   b. Some formerly viable sites have been lost due to needs for Bypass right-of-way acquisition.
   c. Some existing sites are being reserved for future expansion of adjoining industrial users.

d. Cost of infrastructure to serve sites can be prohibitive.
e. Newberg lacks master planned industrial and business parks that allow for immediate development when industrial firms consider location in Newberg area

3) Highly parcelized land outside the UGB limits alternatives for meeting identified site requirements. Prior to the full implementation of Goal 3 and 4 measures to protect agricultural land outside of the Newberg UGB, considerable rural residential development was permitted outside the Newberg city limits. As such, the small parcel sizes and rural homes and businesses outside of the Newberg UGB limit the availability of suitable employment sites in rural residential exception areas.

4) Newberg's commercial sector has been under considerable stress as retail paradigms have changed over the last few decades. Regional malls and the more recent development of "big-box" stores are strong competitors to Newberg businesses. While the volume sales model of these types of stores bring lower costs to consumers for goods, this pattern has had a negative impact on the relatively smaller retailers of the local economy. In addition, the ease of shopping through internet sales is being utilized by growing number of customers. Many locally-owned businesses find it difficult to compete under this new paradigm, a situation that has forced many of them to go out of business.

5) In addition, Newberg's close proximity to the Portland metro area and relatively low retail opportunities results in retail dollar "leakage" from the community. This means that fewer retail dollars stay in the community and continue to circulate within the local population.

6) Despite major investments in the last few years, SP Newsprint is experiencing financial pressures due to changing market conditions. The financial pressures on SP Newsprint are mostly on the macroeconomic scale, significantly reducing Newberg's ability to positively impact this situation.

7) Oregon's Statewide Planning Goals. Economic development in Oregon is strongly influenced by many of these goals. Balancing of these goals often creates a planning process for local economic development that is long, expensive, and uncertain: a process that is frequently incompatible with needs of an ever-increasingly fast-paced business world. It can prevent including suitable industrial and employment sites when needed.

Special Opportunities

Beyond the regional economic markets, Newberg has several special opportunities to capitalize on its unique niche geographically and in the market place. These are discussed below.

Dental Equipment Cluster

Newberg is the home of A-dec, one of the largest dental equipment manufacturers in the world. This also has spurred other dental equipment companies, such as DCI International and Beaverstate Dental, and several other industries that supply machined parts, electrical supplies,

or other equipment. The dental industry is an expanding market, especially in Asian markets where dental care is increasing. There are over 30 billion teeth in China: if Newberg suppliers can capitalize on even a small part of this market, they could expand substantially.

Alternative Energies

As concerns of peak oil, global warming, and carbon emissions rise, so do opportunities for the alternative energy industry. Several Newberg firms already have begun to capitalize on this industry. Harris Thermal constructs heat exchange equipment that is used in the manufacture of biofuels. Climax Portable Machine Tools constructs equipment that is used in the maintenance of wind power turbines. Local companies such as Voltair are manufacturing wind turbines for private sale. The Newberg area has an expanding wind energy cluster of suppliers, manufacturers, and technicians. Newberg has excellent opportunities to capitalize on this market.

South Industrial Area

As noted in the discussion of regional industrial land availability on page 13, the region has a significant lack of suitable industrial sites. In particular, the region lacks large, flat industrial sites with good transportation access and available utilities. In addition, the state's Industrial Lands Advisory Committee found,

> *Land located at existing freeway interchanges, such as the Stafford District at I–205 and Stafford Road, Langdon Farms at the I–5 and Charbonneau exit, and the I–5 Donald/Aurora exit are logical market driven locations for large scale industrial and employment intensive development.* [43]

However, they also found:

> ***Donald-Aurora I–5 Interchange****—The Donald-Aurora interchange on I–5 is approximately 20 miles south of Portland. Although this is a prime location for industrial development when viewed from a market perspective, the land surrounding the interchange is zoned Exclusive Farm Use (EFU) and is in not within any jurisdiction's UGB. Given current land use laws these are substantial obstacles to development.* [44]

Newberg's South Industrial area is along Wynooski Road and Highway 219. Newberg recently prepared the *South Industrial Area Master Plan*, which envisions utilizing the area along Highway 219 south of Wynooski Road by including several large, flat parcels for future industrial use. The South Industrial Area is uniquely posed to accommodate industrial users in the region:

[43] *Industrial Lands Advisory Committee Report*, December 15, 2003
[44] *Industrial Lands Advisory Committee Report*, December 15, 2003

- It contains large, level sites. The area can accommodate employers needing sites of 10 acres up to 100 acres.
- The area is adjacent to Newberg's existing industrial areas, and is a logical extension of that area.
- It has excellent access. The area is about a 10-15 minute drive to I-5 without traveling through any intervening urban areas. The future Newberg-Dundee bypass will travel east to the Portland metro area through no traffic lights until the Portland UGB. It will allow travel west to the Oregon Coast through only one stop light, and to the Mid-Willamette Valley with few stops.
- Newberg has the utility capacity to serve the area with relatively short extensions.
- The area has excellent riparian buffers consisting of two stream corridors between the proposed future industrial area and conflicting uses. No travel would be required through residential or commercial areas.

Were the area included in the Newberg Urban Growth Boundary, it certainly would attract the target industries Newberg is seeking.

Aviation Related Industry

Newberg is home to the Sportsman Airpark. This is a private/public use airport in the Urban Growth Boundary. The Sportsman Airpark Industrial District is situated next to the landing strip. The Sportsman Airpark District has three important advantages over other airport related industrial areas:

- Industrial land can be owned by individual users. In most industrially zoned districts near airports, land can only be leased to users, and "through the fence" use of adjacent industrial land is not allowed.
- All adjacent land is within the UGB.
- The airpark is adjacent to the Airpark Residential Zone, which allows business owners and entrepreneurs to live in close proximity to their planes.

With these advantages, the airpark presents excellent opportunities for small to medium industrial users. It can accommodate aircraft related industries, such as manufacture of airplane parts or aircraft maintenance. It can also attract entrepreneurial businesses that need to use a plane for business travel, visiting clients, or delivering goods. A good example of this is a new company in town, Voltair, which is constructing a new facility in the Airpark Industrial area. Voltair is a manufacturer of wind turbines and their location in the Airpark Industrial area will allow for quick access for maintenance crews to fly to eastern Oregon to service turbine installations.

Nursery and other Agricultural Products

As noted in the section *Yamhill County Agri-Business* on page 10, Yamhill County has developed the *Yamhill County Agri-Business Economic and Community Development Plan*. Of particular note in the plan is the predominance of the nursery and greenhouse

crop industry in Yamhill County, following by the grass seed and fruit and nut products. All of these are present in the Newberg area. The plan identified needs for processing facilities in the County for these and other agricultural products. The plan includes several strategies to promote the agricultural industrial. Of particular relevance to Newberg are the following recommended strategies:

> Rezoning to accommodate prototype development projects. *Analysis has revealed the types of representative projects needed to support agriculture and tourism lack adequate sites. Rezoning enables communities to place these projects where they "fit" and provide benefits to the community.*
>
> Site assembly. *Preparing land for development, from initial site selection through planning and marketing, is site assembly. To assure job growth and allow for new investment, communities will need to be proactive in identifying an adequate supply of properly sized, suitably zoned development sites and be active participants in the development process.*
>
> County-wide infrastructure strategy. *The most pressing problem for every community is infrastructure. Regional cooperation in Yamhill County to jointly plan for the future and secure adequate drinking water supplies can be a model for cost saving inter-agency arrangements for other services. Moving ahead with a reprisal solution for drinking water is critical for many Yamhill County communities.*[45]

Newberg has the infrastructure capable to support such processing facilities. The South Industrial area provides adequate sized sites that would accommodate small and large processing facilities.

Of course converting agricultural land to other uses should not be taken lightly, as that land is important to the agricultural industry. Newberg can assist in this respect by maintaining an urban growth boundary and providing adequate land within that boundary to meet urban land needs at relatively dense development levels. Agricultural land only should be included in the urban area where there is a demonstrated need.

Wine/Tourism Industry

The Chehalem Valley Chamber of Commerce recently branded the area as "the Gateway to Oregon Wine Country." Vineyards and wine productions is a booming business in the Chehalem Valley. This is attracting a great number of tourists, most with money to spend. This has spurred a number of associated economic opportunities, including:

- Accommodation and Hospitality services. Newberg is home to Oregon wine country's premiere facility: The Allison Inn and Spa. It also is home to several bed and breakfast inns and other hotels.

[45] Barney & Worth, Inc., page 43.

- Restaurant and wine tasting. Newberg features several opportunities for fine dining, including the Painted Lady and the Jory at the Allison. Downtown Newberg features several wine bars. There are many opportunities to expand fine and casual dining and wine tasting.
- Arts and Culture. Newberg's downtown has a strong and growing arts community. The Chehalem Cultural Center is set to open soon and will allow art creation and exhibits. This is a strongly growing sector with a lot of opportunity.
- Golf and Recreation. Newberg is home to the Chehalem Glenn Golf Course, one of Oregon's best. This publicly owned course attracts tourists from around the region. A third nine holes is planned, which will further promote the tourism in the area. Additional recreation opportunities, such as for bowling or a family fun center, are desired in the community.
- Riverfront commercial. Newberg has an adopted Riverfront Master Plan for areas along the Willamette River. This future development area will allow views of the Willamette while one shops, dines, or stays. The riverfront area provides access to Roger's Landing, one of the best and most used accesses to the Willamette River.

Retail

Newberg's retail objectives, beyond promoting the wine and tourism industries, focus on providing opportunities for local residents and businesses to obtain the goods the need without travel outside the community. Newberg does have strong retail areas, but sales of certain retail goods are either missing or undersupplied. In many cases the goods are available regionally, but Newberg residents must drive to other areas, such as Washington Square, Wilsonville, Sherwood, or McMinnville. As of 2009, the following retail services are either missing or undersupplied in Newberg: office supplies; electronics; clothing and footwear; sewing supplies; sporting goods; appliances; whole and natural foods. Additional retail services in these areas would be welcome.

IV. Newberg's Economic Development Strategy

Capitalizing on Comparative Advantages & Addressing Comparative Disadvantages

Table 12- 15: Strategies to Capitalize on Comparative Advantages

Advantage	Strategy / Action
1. Small Town Quality of Life	• Continue to provide relatively affordable housing opportunities. • Minimize adverse impacts on existing and planned residential neighborhoods from conflicting employment opportunities. • Continue revitalization efforts of historic downtown. • Support organizations that foster "social capital". • Work to improve the pedestrian/bicycle network in Newberg. *(Applicable Comprehensive Plan policies: 1.p., 1.q., 3.a.)*
2. Access to Quality Education and Skills Training	• Continue to support the Newberg School District, George Fox University, and Portland Community College in their efforts to train and motivate the kind of workforce required by existing and future employers in Newberg. *(Applicable Comprehensive Plan policies: 1.f., 1.q.)*
3. Strong Established and Growing Industry Clusters	• Provide sufficient land near existing industrial areas to allow for expansion. • Provide suitable sites with characteristics required by such industries to take advantage of industrial clusters in Newberg. • Encourage the reuse/redevelopment of properties in zones allowing business. *(Applicable Comprehensive Plan policies: 1.b., 2.e., 2.g.)*
4. Strong Local Support for Business and Employment Opportunities	• Continue to plan for future employment opportunities by providing suitable sites for industrial (export) and commercial uses. • Continue to work collaboratively with the State, Yamhill County, and local businesses to fund infrastructure and planning necessary to maintain and attract desired employment. • Continue to work with and support the Chehalem Valley Chamber of Commerce. *(Applicable Comprehensive Plan policies: 1.m., 1.n., 1.o., 3.b.)*
5. Proximity to Portland Metropolitan Region	• Continue to work with Metropolitan area partners in promoting the economic advantages of the region. • Provide opportunities for identified regional employment clusters in Newberg. • Continue to advocate for improved access to regional markets, via Highways 99W and 219 and the Interstate. • Continue to maintain rail and air access opportunities. *(Applicable Comprehensive Plan policies: 1.f., 1.o., 2.g.)*
6. Future Newberg-Dundee Bypass	• Continue to work with the Oregon Legislature and State agencies to build political support and ensure funding for the Bypass. • Encourage support, funding and construction of the full Bypass project. *(Applicable Comprehensive Plan policies: 1.o.)*
7. Oregon's Statewide Planning Goals	• Newberg has taken advantage of Oregon's Economic Development Program (Goal 9) by identifying comparative advantages (and disadvantages), targeting export-based employment clusters, identifying and providing for the site requirements necessary to maintain and attract such clusters in Newberg, and coordinating with Yamhill County and affected state agencies to retain and provide services to suitable employment sites. Newberg will continue to coordinate with these agencies. *(Applicable Comprehensive Plan policies: 1.f.)*

Table 12- 16: Strategies to Address Comparative Disadvantages

Disadvantage	Strategy / Action
1. Transportation and Access Issues	• Continue to work with the Oregon Legislature and State agencies to ensure funding for the Newberg-Dundee Bypass. • Continue to advocate for Highway 99W improvements to reduce congestion and maintain regional connectivity. • Continue to work with ODOT for review of all development proposals in areas that may impact a state highway facility. *(Applicable Comprehensive Plan policies: 1.o.*)
2. Lack of Suitable Employment Sites	• Newberg has considered local, regional, state and national economic trends and identified industry clusters that the City has a reasonable likelihood of attracting to the community. • Newberg has also researched and identified the site characteristics demanded by firms within these industry clusters. Newberg is actively planning for a future industrial area that will meet both the industrial site characteristics and the land needs of the city's population over the next 30 years. *(Applicable Comprehensive Plan policies: 2.h., 2.g.)*
3. Limited Suitable Land Supply Outside UGB	• After considering the potential for rural residential exception areas to meet identified site requirements, the City has selected sites on agricultural land that will be reserved for identified employment needs. *(Applicable Comprehensive Plan policies: 2.e., 2.g.)*
4. and 5. Stressed Commercial Sector and Retail Dollar Leakage	• Recruit businesses that can fulfill commercial needs that are currently being unmet locally. • Support small businesses that are adjusting these new retail realities by either focusing on high quality customer service and/or gearing their business plans toward niche markets. • Encourage local retail businesses to improve their online presence. *(Applicable Comprehensive Plan policies: 1.c., 1.i).*
6. Market Pressures on SP Newsprint	• Newberg will continually look for opportunities to work with SP Newsprint to help reduce their operational costs. *(Applicable Comprehensive Plan policies: 2.d.)*
7. Oregon's Statewide Planning Goals	• Newberg will continue to pursue Urban Growth Boundary amendments and Urban Reserve expansions to provide adequate land for future uses. *(Applicable Comprehensive Plan policies: 1.f.)*

Regional Focus

Newberg has recognized the importance of being part of a shared, regional economic vision. *Beyond the Vision: A Strategic Plan for the Chehalem Valley* is a document that was created cooperatively between five governmental entities located within the Chehalem Valley. This document was adopted by the Newberg City Council in January 2005. One section of this document, called *Economy and Employment,* describes the economic future of the area as follows:

> *A diversified economy provides balanced economic opportunities for the residents of the Chehalem Valley. Agriculture and agribusinesses are an important component of the local economy. The natural beauty of the area encourages*

tourism and the wine industry. A carefully targeted retail recapture strategy has encouraged more local shopping and minimized buying outside of the area. Downtown areas are vibrant commercial areas that support the local economy.

Clean industries have been developed using a "campus" design. Plenty of family wage jobs are available for citizens of the area. Tourism is a major economic force, its strengths based on the premise that the Chehalem Valley is 1) the gateway to the wine country; 2) characterized by a clean and comfortable environment; and, 3) offers the historical experience of a friendly, small town and village America in the earlier period of the 20th century. As a destination location for visitors, the community of Dundee now has two small exclusive hotels and bed and breakfast inns. The service industry has expanded, with the health industry and health research being a major provider of employment in this sector of the economy.[46]

Key strategic steps laid out for the *Economy and Employment* section of the plan are as follows:

- Hold a broad community forum on economic development to build consensus.
- Invigorate the Chamber of Commerce Economic Development Committee.
- Seek financial aid in the form of grants.
- Develop community college training programs tailored to the labor force needs of prospective employers.

The regional economic development paradigm is expected to continue in the foreseeable future. Newberg has worked extensively with the Mid-Willamette Valley Council of Governments and the Oregon Business Development Department for many years. With an understanding that Newberg's economic future is likely to be strongly linked with fortunes of the Portland region, the City has recently developed relationships with economic development organizations in the metropolitan area. In the summer of 2004, the City of Newberg joined the Association of Regional Economic Development Partners, Inc. (now the Portland-Vancouver Regional Partners Council for Economic Development.). The Partners is "a public-private partnership that focuses on shared economic priorities and works to implement business retention, expansion, and recruitment as well as marketing strategies and recommendations for policy development. The members are public and private sector economic development professionals in the region who have worked collaboratively for more than 10 years to retain and recruit businesses, and promote the metropolitan region as a vital economic center."

On January 3, 2005, the Newberg City Council passed Resolution No. 2005-2554, which stated the city's support for the framework of the Portland Regional Business Plan of the Regional Economic Development Partners.

[46] *Beyond the Vision: A Strategic Plan for the Chehalem Valley*

Locally Targeted Economic Development Industry Clusters (Target Industries)

The majority of Newberg's economic development efforts should continue to be focused upon supporting existing local businesses. In the economic development profession, there is a general principle call the "80/20 rule", which means that 80 percent of an area's economic development efforts should be dedicated towards the retention and expansion of existing local businesses. In addition, it is often said that "Your good businesses are your competitor's best recruitment prospects!" Therefore, a community should ensure, as much as possible, that their local businesses are content and prosperous, or else they may look elsewhere to do business. In summary, it is far easier, effective and efficient to try to maintain and expand your economy through one's local industries than to attract new ones.

As important as Newberg's retention efforts are for its economic health, recruiting specific new businesses to Newberg such as those listed in the Portland-Vancouver Regional Business Plan and the Newberg EOA is a critical aspect of Newberg's economic development strategy. Some of these businesses can be recruited to strengthen existing clusters within the community. Others are new types of businesses that can be attracted based on combination of three factors: a business' cluster strength in the Portland region; Newberg's close proximity to the metro area, and Newberg's unique high quality of life compared to other communities in the region. The City's business recruitment efforts should be focused on identified strong, traded-sector clusters. These types of businesses will bring new wealth to the community and diversify the local economy, thereby creating an economic base that is stronger and more stable. Table 12- 17 on page 39 lists industries on which Newberg should focus its economic development efforts.

Table 12- 17: Newberg Targeted Industries

Business Cluster	Targeted business types
Manufacturing and Industry	
High Tech Manufacturing	Semiconductors/silicon, imaging & display technology
	Nano & micro technology, cyber-security, health/medical information technology
	Biotech/bioscience (medical devices, bioinfomatics, pharmaceuticals, genomics, anti-virals)
General Manufacturing	Dental equipment
	Metals, machinery, transportation equipment
	Lumber and wood products (value added)
	Sustainable industries (renewable energy, resource efficiency technologies, sustainable building materials, green chemistry)
	Distribution & logistics
	Sports apparel/recreation-related products
Aviation related	Specialty aircraft equipment, aircraft repair, machine shops, small entrepreneur business
Agriculture	Wineries
	Specialty foods and food processing
	Nursery and agricultural products (value added)
Services	Professional services architecture, engineering, legal and financial services, etc.
	Creative services (advertising, public relations, film and video, web/internet content and design)
Health Care	
	Providence Medical Center Expansion, medical offices, senior services
Higher Education	
	Portland Community College campus, George Fox University expansion, high school vocational training and college preparedness, private post-secondary training
Wine/Tourism	
	Wineries and tasting rooms, restaurants, art studios, theater and entertainment, recreation (golf, bowling), conference facilities, specialty retail

Source: Newberg Planning Division

Comprehensive Plan Policies and Recommended Supportive Economic Development Actions

Newberg has developed a vision for the community's economic future. The City of Newberg's adopted Comprehensive Plan includes a list of goals and policies that help shape Newberg's future economy (Section H. The Economy). The following is a list of Newberg's recommended economic development actions and the applicable Comprehensive Plan policies they support. All of the Comprehensive Plan policies are from Section H (The Economy) and support the larger goal "To develop a diverse and stable economic base".

1. Work with the State to "certify" industrial sites to shorten the development time of projects and provide certainty to a business that regulatory and permitting issues will not delay the project's timeline.
   Applicable Comprehensive Plan policies: 1.f., 2.g.

2. Identify and implement cost and time saving measures that improve the development permitting process.
   Applicable Comprehensive Plan policies: 2.d.

3. Develop a financial incentives "toolbox" to recruit new businesses and encourage existing business expansions. The incentives should be applied only after a proposed project has been reviewed by a rigorous analysis that demonstrates a clear benefit to the City.
   Applicable Comprehensive Plan policies: 1.b., 1.g.

4. Maintain a useful economic development website that is easy to navigate and contains substantive content that meets the needs of business.
   Applicable Comprehensive Plan policies: 1.a., 1.g.

5. Work with local, regional and state educational and training resources (private and public) to assist with the workforce training needs of businesses and provide opportunities for workers to voluntarily upgrade their skills. The available workforce pool in the Newberg region is approximately 223,000. The regional workforce is estimated by using the assumption that a 23 minute mean commute time (2000 Census) draws workers from an approximately 15 mile radius from the center of Newberg Oregon is recognized for having an educated workforce, one with good basic work skill sets that allows them to be relatively easily trained.
   Applicable Comprehensive Plan policies: 1.c., 1.f.

6. Gauge the health of local businesses regularly and identify how the City can help resolve issues, when feasible. Focus should be on businesses of the traded-sector and local clusters. Anticipate local problem areas by keeping abreast of regional, national, and international business trends.
   Applicable Comprehensive Plan policies: 1.p.

7. Develop closer ties to organizations/businesses located within the Portland area with a similar interest in regional economic development (e.g. Regional Economic Development Partners, future Portland Economic Development District, etc). However, joining METRO will not be considered. Reevaluate current relationship with Mid-Willamette Valley Community Development Partnership.
   Applicable Comprehensive Plan policies: 1.f.

8. Develop a Downtown Revitalization Master Plan prior to the construction of the Newberg-Dundee Bypass. Identify funding sources necessary to implement the plan.
   Applicable Comprehensive Plan policies: 3.a.

V. Industrial and Commercial Land Needs and Supply

To encourage and accommodate future commercial and industrial growth, Newberg must have developable land readily available with characteristics necessary to be competitive in the regional economic development market. Newberg's Ad Hoc Committee on Newberg's Future recently completed an analysis of the community's future land use needs. That analysis is described in the *Report to Newberg City Council; Recommendations for Newberg's Future*, which was accepted by the Newberg City Council on July 21, 2005. On August 1, 2005, the City Council initiated the amendment process for the comprehensive plan changes recommended in the Report. The following are the Committee's recommendations for commercial and industrial land needs for Newberg's future. These also include updates made in 2009 to reflect development since the time of the report.

Industrial Land Need

Industrial Employment Projections

Table 12- 18 below projects the future industrial space utilizing employment in Newberg through 2040. The table uses the total employment projected in Table 12- 14 on page 26. The table then calculates the percent of that employment that will utilize industrial space using the same percentages from Johnson-Gardner's 2004 *City of Newberg – Demand for Commercial and Industrial Land* report.

Table 12- 18: Industrial Space Utilizing Employment Projection through 2040

Industry	% Industrial Space Utilizing	2009	2018	2020	2025	2030	2035	2040
Construction	*30%*	117	197	210	239	267	301	337
Manufacturing	*91%*	2,003	2,287	2,443	2,782	3,110	3,505	3,924
Wholesale Trade	*82%*	60	87	93	105	118	133	149
Retail Trade	*0%*	-	-	-	-	-	-	-
Transportation, Warehousing & Utilities	*93%*	169	177	189	216	241	272	304
Information	*88%*	39	49	53	60	67	76	85
Financial Activities	*0%*	-	-	-	-	-	-	-
Professional & Business Services	*18%*	58	85	91	104	116	131	146
Education & Health Services	*0%*	-	-	-	-	-	-	-
Leisure & Hospitality	*0%*	-	-	-	-	-	-	-
Other Services	*93%*	380	403	431	491	549	618	692
Government	*0%*[47]	-	-	-	-	-	-	-
Total		2,825	3,286	3,510	3,997	4,468	5,035	5,638
Cumulative from 2009		-	461	685	1,172	1,642	2,210	2,812

[47] Johnson-Gardner estimated 35% of government employment would be industrial space utilizing. The amount of government related industrial land is accounted in the "Public/Quasi-Public" category, thus is not included here.

Industrial Site Requirements

A variety of parcel sizes, building types, and land use designations are required to provide suitable sites to attract targeted industry clusters. In 2005, the *Report to Newberg City Council; Recommendations for Newberg's Future* documented that there was a general lack of suitable large (20+ acre) industrial sites with access to a state highway and physical separation or transitional buffering from residential neighborhoods. The report documented an additional need for 4-5 large (20+ acre) industrial sites for the period 2005-2025. Industrial land needs for the 2005-2025 period totaled about 216 acres, with an additional 6 sites needed for the period 2026-2040. The assumption was that approximately 50 percent of future industrial employment will take place on large parcels.

In 2009, the Department of Land Conservation and Development (DLCD) encouraged the City to refine its target industries analysis and site needs requirements to determine whether a UGB amendment could be justified. The City has since worked closely with OBDD to refine its industrial site requirements.

This section includes four tables:

1. Table 12- 19 describes average site sizes for targeted industry sectors and clusters;
2. Table 12- 20 arranges targeted industry sectors and clusters into site size ranges and provides examples of existing Newberg industries in those clusters and ranges; and
3. Table 12- 21 associates projected employee growth with site sizes, including redevelopment assumptions, to project a number of needed sites within each site size category.
4. Table 12- 22 describes the site suitability characteristics required for light industrial and Airport-related developments.

Table 12- 19 links targeted industry clusters discussed in this EOA with uses identified in the 2005 *Report to Newberg City Council*. These clusters and uses were allocated site size ranges based on ECONW and a meeting with Oregon Business Development Department (OBDD) representative Tom Fox on September 10, 2009. Site size ranges were verified against OBDD data relating to real firms seeking sites in Oregon, in the targeted industry clusters. Industry clusters containing firms that could potentially require large sites – 10-30 acres or 30-50 acres in size – are identified by the Potential Large Site Category columns. Thirteen industry clusters include firms that could potentially require 10-30 acre sites, and nine include firms that could potentially require 30-50 acre sites.

OBDD reviewed the site size ranges by targeted industry cluster in Table 12- 19 and supports the estimated site sizes and ranges as viable and marketable for Newberg's targeted industries.

Table 12- 19: Site Size Ranges by Targeted Industrial Cluster and Sector

Industry Cluster	Uses	ECO/WB* (Acres)	OBDD** (Acres)	Newberg Examples (Acres)	Potential Large Site Categories	
					10 - 30	30 - 50
High Tech Manufacturing	Electronics, Other	10 - 30	10 - 60	6 - 55	X	X
	Health, Nano/Micro Tech, Cyber Security	5 - 20		6 - 55	X	X
	Bio-Tech/Bioscience/ Pharmaceuticals, Health Services	5 - 40	2 - 60		X	X
General Manufacturing	Dental Equipment	5 - 40		2 - 55	X	X
	Fabricated Metals, Plastics	10 - 20	10 - 20	3 - 7	X	
	Transportation Equipment	10 - 30	10	1	X	
	Industrial Machinery	10 - 20	10 - 20	3 - 6	X	
	Lumber and Wood Products (Value Added)	1 - 10	10	243	X	X
	Sustainable Industries	5 - 25	25 - 200	1 - 7	X	X
	Distribution and Logistics	5 - 60	30 - 60		X	X
	Sports and Recreational Campus	10 - 50			X	X
Airport Related Industrial	Specialty Aircraft Equipment, Aircraft Repair, Machine Shops, Small Entrepreneur Business	1 - 70	70	1 - 3		
Agriculture	Winery			3 - 5		
	Specialty Foods and Food Processing	1 - 10	10 - 150	5	X	X
	Nursery and Ag Products (Value Added)	1 - 10		2 - 13	X	
Services	Professional Services	1 - 5		1 - 2		
	Creative Services, Printing, Publishing	1 - 10		1 - 2		

*ECO/WB: EcoNorthwest and Winterbrook Planning
**Outside Investment Prospects, OECDD (OBDD), Oct 2008

Table 12- 20 below arranges the identified target industry clusters and sectors by potential site sizes, and associates those sizes with existing Newberg industries. As shown in Table 12- 19, some industry clusters and sectors appear in multiple site size categories due to wide potential ranges. Of note, Newberg's existing large industrial sites (A-Dec and SP Newsprint) are over 50 acres in size.

Newberg has an excellent example of a high tech traded-sector manufacturing cluster – three large firms in the dental industry. A-Dec, A.R.E. Manufacturing, and Dental Components Inc. employ slightly over 1,000 people on 67 acres of industrial land. It is not unreasonable for Newberg to assume similar success with another targeted-industry cluster. As such, 10-30 and 30-50 acre sites should be included to provide the City with this opportunity.

Table 12- 20: Targeted Industry Clusters and Sectors by Site Size Ranges and Existing Newberg Industrial Firm Examples

Site Size Range	Industry Clusters/Uses	Newberg Industry Examples
<10 Acres	• Health, Nano/Micro Tech, Cyber Security • Bio-Tech/Bioscience/Pharmaceuticals • Dental Equipment • Fabricated Metals, Plastics • Lumber and Wood Products (Value Added) • Sustainable Industries • Distribution and Logistics • Airport Related Industrial • Winery • Specialty Foods and Food Processing • Nursery and Ag Products (Value Added) • Professional Services • Creative Services	• Climax Portable Machine Tools • PPM Technologies • A.R.E. Manufacturing • Dental Components Inc. • Ushio Oregon • Harris Thermal Transfer Products • Airpark Business Complex
10 – 30 Acres	• Electronics • Health, Nano/Micro Tech, Cyber Security • Bio-Tech/Bioscience/Pharmaceuticals • Dental Equipment • Fabricated Metals, Plastics • Transportation Equipment • Industrial Machinery • Lumber and Wood Products (Value Added) • Sustainable Industries • Distribution and Logistics • Sports and Recreational Equipment Campus • Specialty Foods and Food Processing • Nursery and Ag Products	• Suntron Corporation[48]
>30 Acres	• Electronics • Health, Nano/Micro Tech, Cyber Security • Bio-Tech/Bioscience/Pharmaceuticals • Dental Equipment • Lumber and Wood Products (Value Added) • Sustainable Industries • Distribution and Logistics • Sports and Recreational Equipment Campus • Specialty Foods and Food Processing	• SP Newsprint Company • A-dec, Inc.

[48] Suntron announced plans to close operation in Newberg in 2010.

Table 12- 21 links projected 2030 industrial employment from Table 12- 18 on page 41with potential site size ranges. While examples can be found of large sites with few employees, and small sites with many employees, larger employers generally require larger sites. This table is one way to address that dynamic while relating projected industrial site needs to adopted employment projections.

The data is based on the assumption that most sites under 10 acres will be located in industrial parks, which will require dedication of an average of 15% right-of-way for streets and utilities. For sites over 10 acres, the table assumes 5% of the area for streets and utilities. The table also includes assumptions that most (55%) of Newberg's future industrial employment will be located on sites 10 acres or less, and that one-third of those future new industrial firms under 10 acres in size, and one-half of firms under 2 acres in size, will find a site through infill redevelopment or intensification of existing employment land uses.

Table 12- 21 shows the 2030 need for approximately 24 acres of very small (under 2 acre) sites, 75 acres of small (2- to 10-acre) sites,[49] two sites in the 10-30 acre range, and one site in the 30- to 50-acre range, for a total industrial site need of 183 gross buildable acres by 2030. These needs for small and medium sites are consistent with recent demand for industrial land in Newberg. From 2005 to 2009, there were 24 acres of industrial land developed. A number of industrial employers expanded or constructed new facilities over that time, including Action Equipment, Climax Portable Machine Tools, Harris Thermal, A-dec, and Freeman Manufacturing. The total land needs equate to approximately 10 employees per developed acre, which reflects the reality that many firms look for sites that allow for future expansion, and is consistent with the site size per employee ratio of many of Newberg's largest industrial employers.[50]

Table 12- 21: Site Size Distribution by Firm Employment (2010-2030)

Employees per Firm	Percent of Employment	Number of Employees	Number of Firms	Sites Needed	Size Range (Acres)	Average Site Size (Acres)	Average ROW Need (Acres)	Gross Buildable Acres Needed
0-9	15%	246	41	21	<2	1	0.15	24
				20	*infill & redevelopment*			0
10 to 74	40%	657	19	13	2 - 10	5	0.75	75
				6	*infill & redevelopment*			0
75 to 150	15%	246	2	2	10 - 30	20	1.00	42
150+	30%	493	1	1	30 - 50	40	2.00	42
Total	100%	1,642	63	63				183

Source: Winterbrook Planning 2009, Newberg Planning Division

In addition, there is a projected need for 1,170 industrial employees for the period 2031-2040.

[49] Much of this site size need can be most efficiently accommodated by master planned business parks.

[50] Review of site sizes for existing industrial firms with over 50 employees in Newberg determined an average of 4.75 employees per acre. A fully developed site for an employee-rich industrial firm like A-Dec is able to achieve about 16 employees per acre. Firms like A.R.E. Manufacturing, Dental Components Inc., Ushio Oregon Inc., and Harris Thermal Transfer Products come in around 7-11 employees per acre.

At an average of 11 employees/acre, which represents a 10% increase in future industrial density as a further efficiency measure, plus 10% of the land area for right-of-way (based on an a mix of small and large sites), this will generate an additional need for 117 gross buildable acres of land for the period 2031-2040.

Table 12- 22 shows the site suitability characteristics needed for these targeted industries.

Table 12- 22: Required Industrial Site Suitability Characteristics

Required Site Characteristic	Description	Statutory, Rule or Plan Basis
Site Size	• Minimum parcel size 5 vacant acres (or vacant with less than ½ acre occupied by permanent structures) • Group of at least 20 suitable acres as defined below • May include parcels with less than 5 vacant acres if site is currently an industrial use or is vacant and adjacent to industrial use or group of 20 suitable acres • Inventory to include sufficient large sites (10-30 acre and 30-50 acre categories)	ORS 197.712; Goal 14; OAR 660-009-0025; OAR 660-024-0060; Revised Newberg EOA
Topography	Exclude: • Slopes of 10% or greater • Inventoried and protected riparian corridors / wetlands • Areas within the designated Stream Corridor Overlay (which include the 100-year floodplain) • Remaining suitable area contiguous and generally rectangular in shape for efficient development	ORS 197.712; Goal 14; OAR 660-009-0025; OAR 660-024-0060; Revised Newberg EOA
Proximity to Transportation and Services	Include parcels (or group of parcels): • Within, or contiguous to existing UGB to allow for efficient extension of urban services, or as part of group of parcels that could immediately be added to UGB • Adjacent to or within 1/8 mile of a major arterial or state highway access without travel through non-industrial properties. • Provides connection to I-5 via Highway 219 • Site adjacent to Sportsman Airpark necessary for airport-related industrial uses • Adjacent to existing industrial areas, or agglomeration of at least 100 new acres to facilitate agglomeration economies and minimize adverse impacts	ORS 197.712; Goal 14; OAR 660-009-0025; OAR 660-024-0060; Revised Newberg EOA
Compatibility (residential, downtown and resource land)	Exclude sites that: • Abut residential neighborhood on more than 25% of the site perimeter unless effective topographical or road buffers present or planned • Abut large contiguous tracts of agricultural land unless effective topographic or road buffers are present or planned • Result in truck traffic through downtown	ORS 197.712; Goal 14; OAR 660-009-0025; OAR 660-024-0060; Revised Newberg EOA; Goal 14 Locational Factors

Industrial Land and Sites

The comprehensive plan inventory of buildable industrial land was updated in 2009, consistent with the requirement in OAR 660-009-0015 (3) for an inventory of industrial and other employment land. The term "buildable industrial land" as used in this plan is consistent with the terms defined in OAR 660-009-0005 as "total supply" of "vacant" or "developed" industrial land that is "suitable" and "serviceable." Buildable land:

1. Includes lots that have any "Industrial" comprehensive plan designation. This includes land in the "Employment" Springbrook District, specific plan industrial districts, and land in the MIX comprehensive plan district zoned industrial. It excludes publicly owned properties intended for city facilities such as the wastewater treatment plant expansion, which are counted in the "public/quasi-public" category.
2. Includes lots that are:
    a. equal to or larger than one half-acre not currently containing permanent buildings or improvements; or
    b. between one-half and five acres that are likely to be redeveloped during the planning period.
    c. equal to or larger than five acres where less than one half-acre is occupied by permanent buildings or improvements.
3. Excludes portions of lots within stream corridors, with slopes over 10 percent, or currently occupied by buildings or industrial uses, or contained within the Newberg-Dundee bypass "build design alternatives options" published August 2008.

Table 12- 23 shows the existing buildable industrial land in the UGB as of 2009. Figure 12- 3 is a map of the buildable industrial land in the UGB in 2009.

Table 12- 23: Buildable Industrial Land in Newberg UGB (2009)

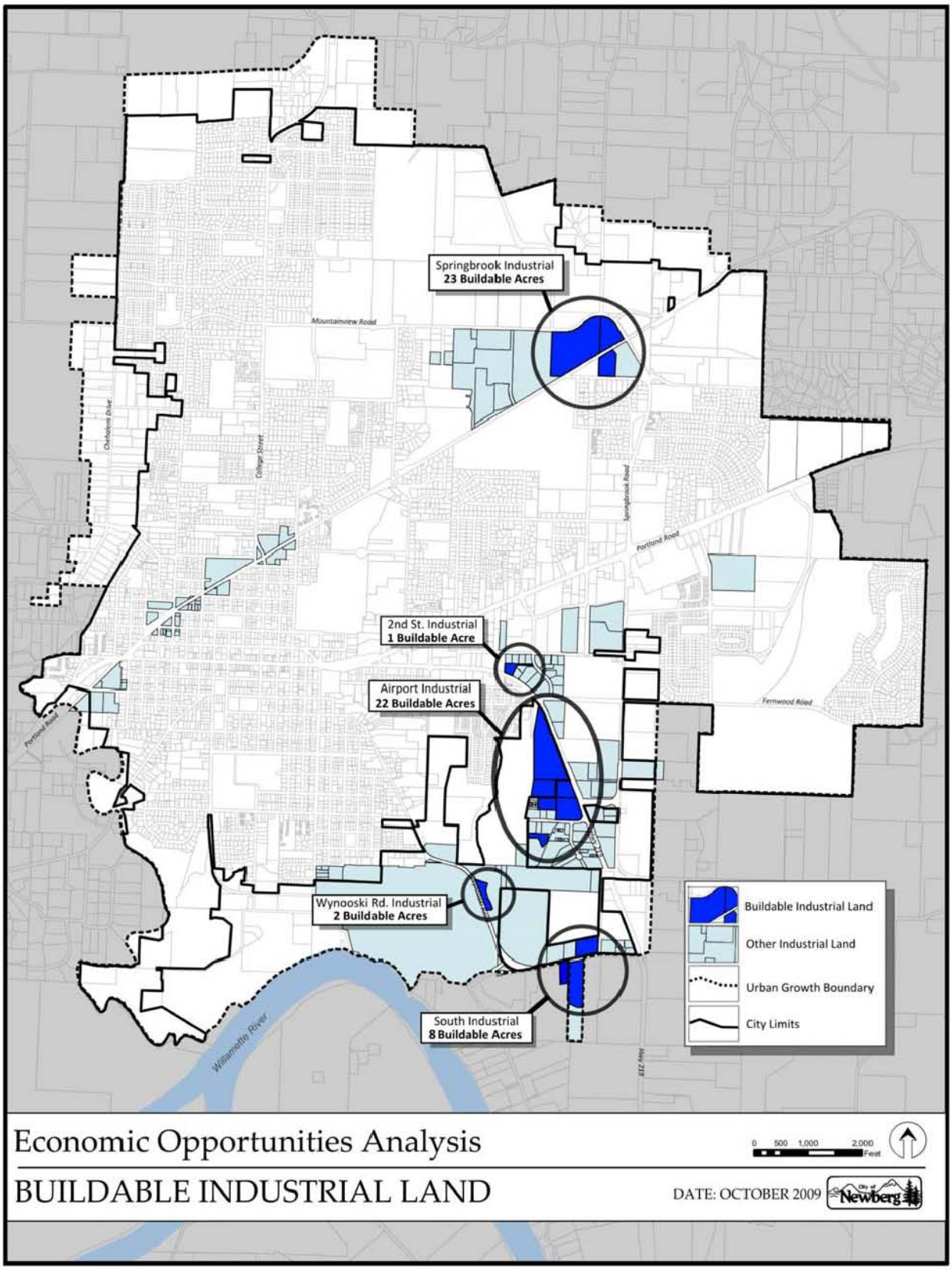
Location	Potential Uses	Buildable Acres	Site Sizes				
			< 2 ac.	2-10 ac.	10-30 ac.	30-50 ac.	Total
Springbrook Employment	Light Manufacturing or Industrial Office	23		1	1		2
Sportsman Airpark[51]	Airport Industrial	22	2	4			6
Wynooski Industrial	Light Industrial	10	1	2			3
Elliot Road Industrial	Light Manufacturing or Industrial Office	1	1				1
Total		56	4	7	1		12

Source: Newberg Planning Division

The current UGB has approximately 56 buildable industrial acres. Newberg's existing industrial land supply is mostly contained within two industrial/employment park areas: approximately 23 buildable acres zoned SD/E (Springbrook District Employment) in the Springbrook area and approximately 22 vacant acres near the Sportsman Airpark. There are also about 10 acres of buildable industrial land scattered throughout the City on individual lots.

[51] The Sportsman Airpark contains one large 55-acre property that contains the existing airport, plus approximately 10.8 acres of buildable industrial land. The approved Sportsman Airpark Master Plan includes a plan for developing the buildable industrial land into an industrial park with aviation related uses. This site was counted in the 2-10 acre category, even though it contains slightly over 10 acres of buildable land, because the approved master plan envisions further division, and the aviation related uses are more likely to be separate smaller firms rather than one large firm.

Figure 12- 3: Buildable Industrial Land, Newberg UGB 2009



2030 Industrial Site Need vs. Supply

As shown in Table 12- 24, Newberg has an unmet need for one 30- to 50-acre site, two 10- to 30-acre sites, 45 acres of 2- to 10-acre sites, and 18 acres of sites under 2 acres in size.

Table 12- 24: 2010-2030 Industrial Land Supply and Need

Size Range (Acres)	Number of Sites - 2009 UGB	Buildable Acres - 2009 UGB	2010-2030 Needed Sites	2010-2030 Needed Gross Buildable Acres	2010-2030 Deficit # of Sites	2010-2030 Deficit Gross Buildable Acres
<2	5	6	21	24	(16)	(18)
2 to 10	7	30	13	75	(6)	(45)
10 to 30	1	20	2	42	(1)	(22)
30 to 50	0	0	1	42	(1)	(42)
Total	**13**	**56**	**37**	**183**	**(24)**	**(127)**

Source: Winterbrook Planning, City of Newberg

This means that Newberg's UGB should be expanded by approximately 127 buildable industrial acres to include:

1) A 30- to 50-acre site;
2) A 10- to 30-acre site; and
3) Industrial park sites totaling approximately 63 buildable acres.

In addition, for the period 2031-2040, Newberg will need an additional 117 gross acres of buildable industrial land. This need has not been divided by site size, but is likely to be similar to the site needs distribution for the 2010-2030 period. The best approach would be to reserve sufficient land in the urban reserve to meet this acreage need, then include suitable land in the UGB as needs arise.

Commercial Land Need

Commercial Land Need

As Newberg's population grows, so will its needs for commercial land. Additional population will bring additional retail, office, and other commercial opportunities. In 2004, Johnson-Gardner prepared a preliminary forecast for the need for office and retail commercial land. The office land need is a function of employment growth based on long-range forecasts by the Oregon Employment Department. The retail land need is a function of household growth and typical household spending patterns. In November 2009, the Oregon Employment Department issued new employment growth forecasts for the 2008-2018 period. The Newberg Planning Division then updated the commercial land need projections for the 2010-2040 period based on this new data, as detailed below.

Office Land Need

Table 12- 25 projects office space utilizing employment for 2010-2040. The table uses the total employment projections from Table 12- 14 on page 26. The table then determines the percentage of that employment that will utilize office space using estimates from the 2004 Johnson-Gardner *City of Newberg – Demand for Commercial and Industrial Land* report.

Table 12- 25: Office Space Utilizing Employment through 2040

Industry	% Office Space Utilizing	2009	2018	2020	2025	2030	2035	2040
Construction	*2%*	8	13	14	16	18	20	22
Manufacturing	*5%*	112	126	134	153	171	193	216
Wholesale Trade	*5%*	4	5	6	6	7	8	9
Retail Trade	*5%*	42	56	60	68	76	86	96
Transportation, Warehousing & Utilities	*30%*	54	57	61	70	78	88	98
Information	*90%*	40	50	54	61	69	77	87
Financial Activities	*90%*	217	255	273	310	347	391	438
Professional & Business Services	*90%*	289	427	456	519	580	654	732
Education & Health Services	*40%*	1,314	1,259	1,344	1,531	1,711	1,929	2,159
Leisure & Hospitality	*40%*	407	554	582	662	740	834	934
Other Services	*40%*	164	174	185	211	236	266	298
Government	*35%*	61	67	72	82	91	103	115
Total	*28%*	2,710	3,033	3,240	3,689	4,124	4,648	5,204
Cumulative from 2009		-	323	530	979	1,414	1,938	2,494

Table 12- 26 converts the office employment projections to land needs. The table uses the assumptions from the 2004 Johnson-Gardner report for office area per employee and floor-to-area ratio (FAR). The table also included a 15% allowance for right-of-way, utilities, and other unbuildable areas.

Table 12- 26: Office Land Needs through 2040

Industry	Office Sq. Ft. per Emp.	FAR	ROW	2009	2018	2020	2025	2030	2035	2040
Construction	*225*	*40%*	*15%*	0.1	0.2	0.2	0.2	0.3	0.3	0.3
Manufacturing	*200*	*40%*	*15%*	1.5	1.7	1.8	2.1	2.3	2.6	2.9
Wholesale Trade	*200*	*40%*	*15%*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Retail Trade	*200*	*40%*	*15%*	0.6	0.8	0.8	0.9	1.0	1.2	1.3
Transportation, Warehousing & Utilities	*225*	*40%*	*15%*	0.8	0.9	0.9	1.1	1.2	1.3	1.5
Information	*200*	*40%*	*15%*	0.5	0.7	0.7	0.8	0.9	1.0	1.2
Financial Activities	*200*	*40%*	*15%*	2.9	3.4	3.7	4.2	4.7	5.3	5.9
Professional & Business Services	*200*	*40%*	*15%*	3.9	5.8	6.2	7.0	7.8	8.8	9.9
Education & Health Services	*200*	*40%*	*15%*	17.7	17.0	18.2	20.7	23.1	26.0	29.2
Leisure & Hospitality	*200*	*40%*	*15%*	5.5	7.4	7.9	8.9	10.0	11.3	12.6
Other Services	*200*	*40%*	*15%*	2.2	2.3	2.5	2.9	3.2	3.6	4.0
Government	*200*	*40%*	*15%*	0.8	0.9	1.0	1.1	1.2	1.4	1.6
Total (Gross Buildable Acres)	*201*	*40%*	*15%*	36.7	41.1	43.9	50.0	55.9	62.9	70.5
Cumulative from 2009					4	7	13	19	26	34

Retail Land Needs

Table 12- 27 projects the need for retail land in Newberg for the 2010-2040 period. The table uses the methodology outlined in the 2004 Johnson-Gardner *Demand for Commercial & Industrial Land Report*. That report uses a five step process to determine commercial land needs:

1. Project future household growth.
2. Estimate Newberg per-household spending in a number of retail categories.
3. Project Newberg retail sales per retail category.
4. Project demand for retail space based on projected sales in each retail category.
5. Convert retail space demands into acreage needs for retail land.

The result of the report's calculations is that for every 1,000 new households, there will be a need for 14.8 net buildable acres of retail land. Thus, using this simple factor, we can project future retail land needs based on the projected household growth. Household growth was updated using the 2009 population estimates for the Newberg urban area as a base.

The table also made three other adjustments to the retail land needs. First, the table includes a 15% allowance for right-of-way, utilities, and similar unbuildable land. Second, as an efficiency measure, the table assumes that 5% of retail land needs will be met through infill or redevelopment of existing commercial land, such as in downtown Newberg. Third, the table includes an allowance for one acre of commercial land inside the UGB estimated to be displaced by construction of the Newberg-Dundee Bypass.

Table 12- 27: Retail Land Needs through 2040

Category	2009	2015	2020	2025	2030	2035	2040
Population	23,582	28,559	33,683	38,352	42,870	48,316	54,097
Households[52]	7,799	9,445	11,140	12,684	14,178	15,980	17,892
New Households (from previous column)	-	1,646	1,695	1,544	1,494	1,801	1,912
Net Buildable Acres per 1,000 households	-	14.8	14.8	14.8	14.8	14.8	14.8
Right-of-Way	-	15%	15%	15%	15%	15%	15%
Infill/Redevelopment	-	(5%)	(5%)	(5%)	(5%)	(5%)	(5%)
Displaced by Bypass	-	-	-	1	-	-	-
Total Gross Buildable Acres Needed	-	27	28	25	25	30	31
Cumulative from 2009	-	27	55	80	105	135	166

Total Commercial Land Needs

Table 12- 28 below sums the office land needs projected in Table 12- 26 on page 52 and the retail land need projected in Table 12- 27 on page 53 to yield total commercial land needs. These land needs are categorized by the 2010-2030 timeframe, and by the 2031-2040 timeframe.

Table 12- 28: Commercial Land Needs, 2010-2040

Type	2010-2030	2031-2040
Office	19 ac	15 ac
Retail	105 ac	61 ac
Total	124 ac	76 ac

Note: All acreages are gross buildable acres.

[52] Projected population was converted to projected households using a conversion factor of 3.024 population per household. This factor was determined using the 2007 Census population estimate for Newberg city of 22,541, and dividing it by the 2006-2008 American Community Survey estimate of 7,455 households. Note that this factor is different than the 2006-2008 ACS estimated population per household of 2.7, because total population includes non-households.

Commercial Site Requirements

In 2004-05, Newberg prepared the *Report to Newberg City Council; Recommendations for Newberg's Future*, which documented the development form necessary to accommodate identified commercial land needs. As can be seen, most of the commercial growth is expected to occur within Newberg's existing commercial areas. Newberg has many commercial opportunities in its downtown core. The Newberg Downtown Revitalization Committee is actively working on projects to revitalize the downtown commercial core, including the addition of a new downtown gateway sign, a downtown demonstration block, and efforts to publicize available public parking areas. There is currently approximately 1 buildable acre in the downtown core; however, it can be assumed that redevelopment, infill, and intensification of uses in the downtown core and other commercial areas will contribute an additional 5% of buildable land supply through 2040.

In addition, Newberg will need to provide large parcels for shopping centers. The Urban Land Institute has identified three types of shopping centers that potentially could be developed in communities such as Newberg: neighborhood centers, community centers and regional centers. A large regional shopping center is not consistent with Newberg's desire to maintain a small town feeling and have a complete community rather than a bedroom suburb; therefore, smaller neighborhood and community shopping centers are preferred.

Newberg needs to ensure that there is an adequate supply of sites with appropriate characteristics for smaller neighborhood and community shopping centers in terms of size, access, and location. Under this approach, future land needs will include needs for 2-3 community centers (10-15 acres each) and 2-3 smaller neighborhood centers (3-5 acres) through 2040. The smaller neighborhood commercial centers should be scattered throughout the community to provide goods and services near where people live and reduce the need to drive into the central area for basic needs.

Table 12- 29: Required Commercial Site Suitability Characteristics

Required Site Characteristic	Description
Site Size	• For neighborhood centers – 3 acres minimum • For community centers – 10 acre minimum No more than two separate ownerships
Topography	Exclude: • Slopes of 10% or greater • Inventoried and protected riparian corridors / wetlands • Areas within the designated Stream Corridor Overlay (which include the 100-year floodplain) • Remaining suitable area contiguous and generally rectangular in shape to enable efficient development
Proximity to Transportation and Services	• For neighborhood centers – access to major collector or minor arterial street at a minimum. • For community centers – access to minor or major arterial.
Compatibility	Exclude sites that: • For community centers, abut residential neighborhood on more than 50% of the site perimeter unless effective topographical or road buffers present or planned

Commercial Land and Sites

The commercial buildable land inventory inside the 2009 Newberg UGB has approximately 120 buildable acres. Newberg has seven main commercial areas. These are shown on Figure 12- 4 on page 57. Table 12- 30 shows the location and amount of buildable land in each area.

Table 12- 30: Buildable Commercial Land in Newberg UGB (2009)

Location	Potential Uses	Buildable Acres	Parcels over 5 Acres Buildable
Downtown	Infill Retail and Office Uses	1	0
College/Mountainview Neighborhood Center	Neighborhood or Community Commercial Center	12	1
Springbrook Hospitality and Village	Tourist Retail and Hospitality	25	2
East Portland Road	Community Commercial Center	28	2
Portland Road	Retail and Office	19	1
Riverfront	Tourist Retail and Hospitality	10	0
Providence Drive	Medical Offices	25	2
Total		**120**	**8**

2030 Commercial Site Need and Supply

Overall, Newberg has nearly an adequate supply of commercial land to meet needs through 2030. The overall land supply is weighted toward medical office land (Providence Drive) and tourist commercial land (Springbrook and Riverfront), and less toward general retail land. There is land for two community commercial centers. There is an overall deficit of 10 acres of retail commercial land.

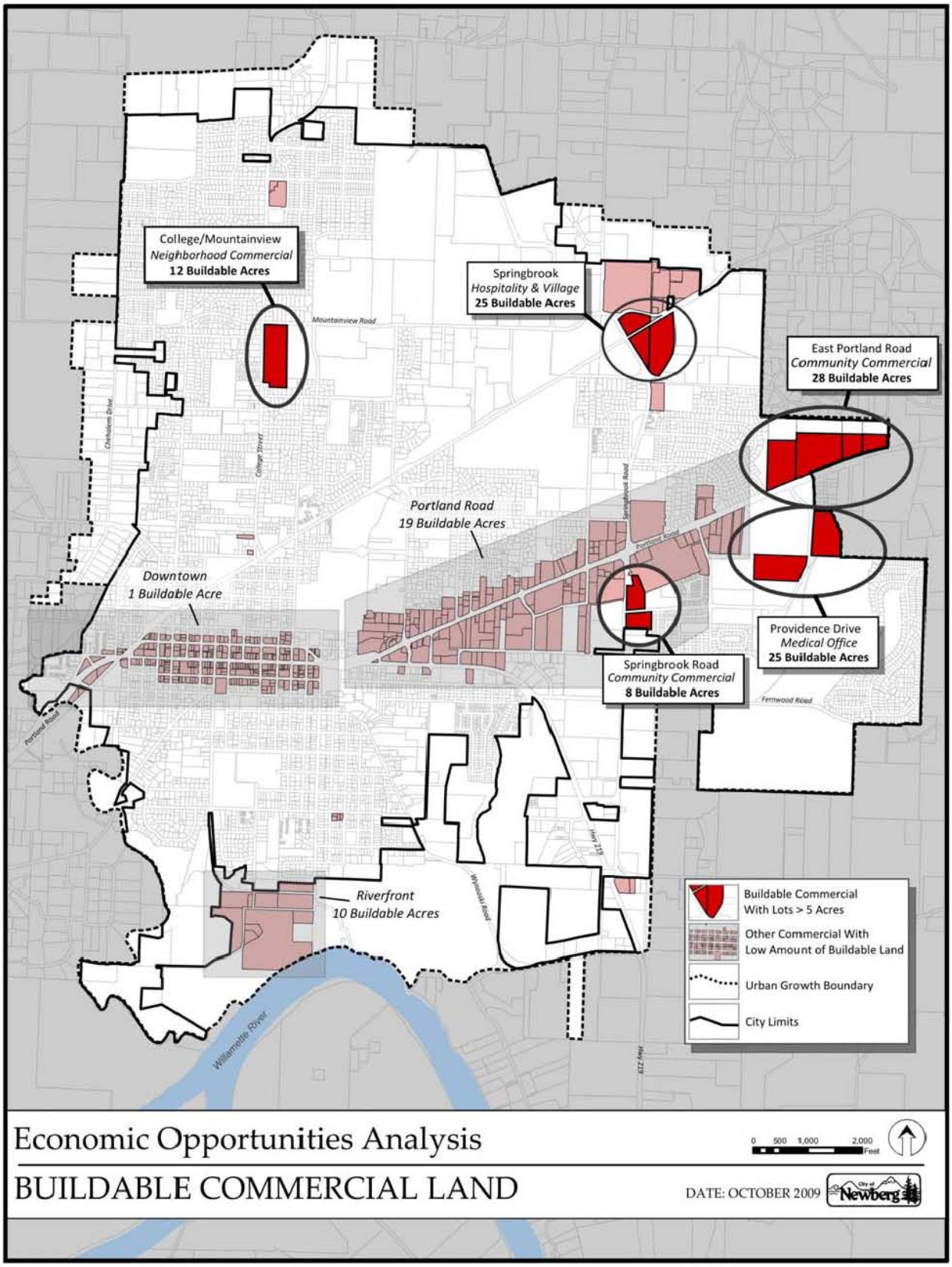
Table 12- 31: Commercial Land Supply and Need

Type	Buildable Acres Needed 2010-2030	Buildable Acres in 2009 UGB	Surplus or (Deficit)	Buildable Acres Needed 2031-2040
Office	**19**	25	6	**15**
Retail	**105**	95	(10)	**61**
Total	**124**	120	(4)	**76**

Note: All figures are gross buildable acres.

There is a need for 76 buildable acres for the time period from 2031-2040. There is a built in assumption that approximately 5 percent of the commercial land need will be made up by downtown redevelopment and infill. The remainder of the future commercial land supply should include an additional community commercial center and 2-3 neighborhood commercial centers.

Figure 12- 4: Commercial Areas and Buildable Commercial Land, Newberg UGB 2009



VI. Conclusion

Newberg's economic base has diversified over time and several of its home-grown industries have become national and international leaders in their respective fields. The City is slowly transitioning into more of an urban center for east Yamhill County as the population grows. However, Newberg citizens have made it clear that they value the "live here, work here, shop here" values and way of life. To keep up the City's commitment to the values of its residents, Newberg must strengthen its economic base and provide adequate industrial and commercial land for current and future populations.

The industrial and commercial buildable land supply tables in this report indicate a shortage of both types of land within the current Newberg Urban Growth Boundary. It is critical for economic development efforts to have adequate buildable land available that meets the identified site suitability requirements for both industrial and commercial areas. The City cannot help provide enough jobs for current and future residents without adequate land to locate new businesses on, and without adequate land for existing businesses to expand onto.

Fortunately, Newberg has many advantages that make it stand out in the regional marketplace, including the following:

- Small town quality of life
- Access to quality education and skills training
- Strong established and growing industry clusters
- Strong local support for business and employment opportunities
- Proximity to the Portland Metropolitan Region
- Future Newberg-Dundee Bypass
- Compliance with Oregon's statewide planning goals

In addition, Newberg has easy access to Interstate 5 on its south side for easy access to industrial locations. One of the most important advantages on the list is that Newberg has strong existing and growing industry clusters in the areas of manufacturing, health care, higher education, and wine tourism. Providing additional adequate land for industrial and commercial businesses that are in these same sectors and other compatible sectors will help strengthen Newberg's economic base for the future.

By following the recommended actions in the plan, Newberg can maintain and build a strong economic base to benefit all its citizens.

Exhibit B:
Proposed Comprehensive Plan Amendments
Ordinance 2010-2723

The following are Comprehensive Plan revisions to implement the revised Economic Opportunities Analysis. Additions to the text are shown as underlined, deletions are shown as ~~strikethrough~~.

SECTION 1 – *Amend the* ***C. SIGNIFICANCE*** *section as follows:*

The Urban Growth Boundary will also have an important effect on local residents. The UGB, although only a guide, is intended to provide adequate space for land use needs over a 20-year planning horizon ~~to the year 2010~~ and defines the area within which urban services can be provided. The purpose of the UGB is to contain urban growth within a reasonable area while providing adequate choices for new development locations.

SECTION 2 – *Add the following to section* ***H. THE ECONOMY:***

GOAL: To develop a diverse and stable economic base.

POLICIES:

1. **General Policies**

m. The City shall collaborate with project developers to construct and maintain the best utility systems possible (e.g. water and sanitary sewer), both from a quality as well as quantity (capacity) standpoint.

n. The City, in cooperation with public and/or private entities, shall invest in the best telecommunications infrastructure possible.

o. The City shall collaborate with other public and private entities and project developers to construct and maintain the best surface transportation infrastructure possible (e.g. roads, airpark, railroad).

p. The City shall strive to develop and promote a high quality of life in the community in order to attract and retain a diverse and highly skilled workforce.

q. The City shall foster an environment of business innovation so that the community may remain economically competitive.

SECTION 3 – *Amend the* ***POPULATION GROWTH*** *section as follows:*

A. HISTORIC POPULATION

Newberg grew over ~~400~~ 450 percent from 1960 to 200~~4~~9. This population growth was due to a variety of factors: regional population growth, expansion of industry and business in the area, proximity to other employment centers, and the high quality of life in the area.

Table III-1. Newberg City Population – 1960-~~2004~~2009

Year	Population
1960	4,204
1970	6,507
1980	10,394
1990	13,086
2000	18,064
~~2004~~ 2009	~~19,910~~ 23,150

Sources: U.S. Census, Population Research Center, Portland, State University

~~In addition, approximately 374 people live in the area between the city limits and the urban growth boundary, making the 2004 Newberg UGB population about 20,284.~~ The Portland State University Population Research Center estimated Newberg's population as of July 1, 2009 to be 23,150. As of July 1, 2009, the Urban Growth Boundary has an estimated population of 23,582.

SECTION 4 – *Amend the* ***LAND NEED AND SUPPLY*** *section as follows:*

A. BUILDABLE LAND INVENTORY

The Newberg Planning Division prepared an inventory of buildable land in the Newberg UGB in 2004, which was updated in November 2009. The buildable land inventory includes vacant and redevelopable land in the existing (2009~~4~~) UGB. This land base is the starting point for determining how much future growth can be accommodated inside the existing UGB and the size of the unmet land need that must be accommodated through zone changes or UGB expansion. Physical constraints such as steep slopes (greater than 25%) and stream setbacks have been deducted from the parcel size, so the buildable land inventory is based on buildable acres, not total acres. In addition, lands that are under development (where a building permit has been issued) are not considered buildable. This inventory also does not include land located within the future right-of-way of the proposed Newberg-Dundee Bypass. In November 2009~~4~~, the Newberg UGB had approximately ~~778~~ 1,071 acres of buildable land ~~inside the UGB~~ (Table IV-1).

Table IV-1. Newberg UGB Buildable Land Inventory (Nov. 2009 ~~2004~~)

Plan Designation	Buildable Land
Low Density Residential	~~359 ac~~ 585 ac.
Medium Density Residential	~~142 ac~~ 132 ac.
High Density Residential	~~13 ac~~ 45 ac.
Commercial	~~105 ac~~ 120 ac.
Industrial	~~159 ac~~ 56 ac.
Park	41 ac.
Institutional	92 ac.
TOTAL	**~~778 ac~~ 1,071 ac.**

Source: ~~Ad Hoc Committee on Newberg's Future (2005), Report to City Council~~ Newberg Planning Division, Buildable Lands Inventory, November 2009

In addition, there is approximately ~~467~~ 381 acres of buildable land within the Newberg Urban Reserve Area. This area does not have any urban comprehensive plan district designations assigned.

C. COMMERCIAL LAND NEED AND SUPPLY

1. Commercial Land Need

As Newberg grows, so will its needs for commercial land. Additional population will bring additional retail, office, and other commercial opportunities. In 2004, Johnson-Gardner prepared a preliminary forecast for the need for office and retail commercial land. ~~Johnson-Gardner prepared a forecasts the need for office and retail commercial land (Table IV-6).~~ The office land need is a function of employment growth based on long-range forecasts by the Oregon Employment Department. The retail land need is a function of household growth and typical household spending patterns. In November 2009, the Oregon Employment Department issued new employment growth forecasts for the 2008-2018 period. The Newberg Planning Division then updated the commercial land need projections for the 2010-2040 period based on this new data. Table IV-8 below updates adopted commercial land needs for the 2010-2040 timeframe. As an efficiency measure and in support of efforts to promote and redevelop downtown, total retail land needs have been reduced by 5%, assuming infill and redevelopment will occur in the downtown core and other commercial areas.

~~**Table IV-8. Commercial Land Need**~~

~~**Type**~~	~~**2005-2025**~~	~~**2026-2040**~~
~~Office~~	~~15 ac~~	~~27 ac~~
~~Retail~~	~~96 ac~~	~~82 ac~~
~~**Total**~~	~~**111 ac**~~	~~**109 ac**~~

~~Source: Johnson Gardner~~

Table IV-8: Commercial Land Need 2010-2040

Type	**2010-2030**	**2031-2040**
Office	19 ac	15 ac
Retail	105 ac	61 ac
Total	**124 ac**	**76 ac**

Note: All acreages are gross buildable acres

2. Commercial Land and Sites

The commercial buildable land inventory inside the 2009 Newberg UGB has approximately 120 buildable acres. Newberg has seven main commercial areas. Table IV-9 shows the location and amount of buildable land in each commercial area.

Table IV-9: Buildable Commercial Land in Newberg UGB (2009)

Location	Potential Uses	Buildable Acres	Parcels over 5 Acres Buildable
Downtown	Infill retail and office uses	1	0
College/Mountainview Neighborhood Center	Neighborhood or community commercial center	12	1
Springbrook Hospitality and Village	Tourist retail and hospitality	25	2
East Portland Road	Community commercial center	28	2
Portland Road	Retail and office	19	1
Riverfront	Tourist retail and hospitality	10	0
Providence Drive	Medical Offices	25	2
Total		**120**	**8**

~~2.~~ 3. Commercial Land Supply

Overall, Newberg has nearly an adequate supply of commercial land to meet needs through 2030. The overall land supply is weighted toward medical office land (Providence Drive) and tourist commercial land (Springbrook and Riverfront), and less toward general retail land. There is land for two community commercial centers. There is an overall deficit of 10 acres of retail commercial land.

Table IV-10: Commercial Land Supply and Need

Type	2010-2030	Land in 2009 UGB	Surplus or (Deficit)	2031-2040
Office	**19**	25	6	**15**
Retail	**105**	95	(10)	**61**
Total	**124**	120	(4)	**76**

Source: Newberg's Ad Hoc Committee on Newberg's Future, Newberg Planning Division

There is a need for 76 buildable acres for the time period from 2031-2040. There is a built in assumption that approximately 5% of the commercial land need will be made up by downtown or other commercial area redevelopment and infill. The remainder of the future commercial land supply should include an additional community commercial center and 2-3 neighborhood commercial centers.

~~The commercial buildable land inventory inside the current Newberg UGB has approximately 105 acres, but consists mostly of small, scattered sites, with only 3 parcels larger than 5 acres. Overall, Newberg has a deficit of commercial land through 2025. Appropriate land will need to be designated commercial to meet future needs, through some combination of changing the plan designation of lands within the UGB and/or adding additional land to the UGB. To meet the commercial land needs through 2040, additional land will need to be designated commercial.~~

~~**Table IV-9. Commercial Land Need and Supply**~~

~~Commerical Land Need 2005-2025 (acres)~~	~~Commercial Land in UGB (2004)~~	~~2025 Surplus (Deficit) (acres)~~	~~Commerical Land Need 2026-2040 (acres)~~
~~111~~	~~105~~	~~(6)~~	~~109~~

D. INDUSTRIAL LAND NEED AND SUPPLY

1. Industrial Land Need

In November 2009, the Oregon Employment Department issued new employment growth forecasts for the 2008-2018 period. The Newberg Planning Division then updated the industrial land need projections based on this new data. For employment projections beyond 2018, employment was projected to grow at the same rate as the projected population growth. This rate is in accordance with the safe harbor provision described in OAR 660-024-0040(9). ~~Johnson-Gardner prepared future industrial land forecasts based on long-range employment forecasts and converted the new jobs to space needs for each employment sector(Table IV-10). This forecast is based on a high employment growth scenario~~ The employment projections are also consistent with Newberg's economic development goals to bring more family-wage jobs to the area and to avoid becoming a bedroom community.~~[1]~~

Newberg has identified four "target" industry clusters that are the foundation of its economy: manufacturing, health care, higher education, and the wine/tourism industry. In addition, there are regional "target industries" that can reasonably be attracted to our community. Newberg's Economic Opportunities Analysis considers the size and type of sites needed by these target industries. ~~In addition to an~~ As part of the overall supply of buildable land, Newberg needs to have sites available ~~the~~ that meet the specific needs of ~~potential industrial users, so-called "target industries".~~ these industries. A variety of parcel sizes, building types, and land use designations are required to attract target industries and provide market choice. Economic trends indicate that just over half of Newberg's future industrial employment will be located on sites of 10 acres or less. Of those, one-third of the future new industrial firms under 10 acres in size, and one-half of firms under 2 acres in size, will find a site through infill redevelopment or intensification of existing employment uses. The remainder of Newberg's future industrial employment will require larger parcels over 10 acres in size. Table IV-10 below shows that Newberg has a need for 183 gross buildable acres through 2030.

Table IV-10: Site Size Distribution by Firm Employment (2010-2030)

Employees per Firm	Percent of Employment	Number of Employees	Number of Firms	Sites Needed	Size Range (Acres)	Average Site Size (Acres)	Average ROW Need (Acres)	Gross Buildable Acres Needed
0-9	15%	246	41	21	<2	1	0.15	24
				20	*infill & redevelopment*			0
10 to 74	40%	657	19	13	2 - 10	5	0.75	75
				6	*infill & redevelopment*			0
75 to 150	15%	246	2	2	10 - 30	20	1.00	42
150+	30%	493	1	1	30 - 50	40	2.00	42
Total	100%	1,642	63	63	-	-	-	183

~~1 Johnson-Gardner (2004), *City of Newberg – Demand for Commercial and Industrial Land*~~

Source: Winterbrook Planning 2009, Newberg Planning Division

~~Table IV-10. Industrial Land Need~~

	~~2005-2025~~	~~2026-2040~~
~~Industrial~~	~~87 acres~~	~~75 acres~~

~~Source: Johnson Gardner~~

~~In 2005, there is a general lack of suitable large (20+ acre) industrial sites with access to a state highway and physical separation or transitional buffering from residential neighborhoods.Therefore, Newberg needs 4 large (20+ acre) industrial sites for the period 2005-2025 and an additional 6 sites for the period 2026-2040. The assumption is that approximately 50 percent of the future industrial employment will take place on large parcels.~~

2. ~~2025~~ 2030 Industrial Land Supply and Need

The city reviewed and updated the buildable industrial land inventory in 2009, consistent with the requirement in OAR 660-009-0015(3) for an inventory of industrial and other employment land. The term "buildable industrial land" as used in this plan is consistent with the terms defined in OAR 660-009-0005 as "total supply" of "vacant" or "developed" industrial land that is "suitable" and serviceable". Table IV-11 shows the existing buildable land in the UGB as of 2009.

Table IV-11: Buildable Industrial Land in Newberg UGB (2009)

Location	Potential Uses	Buildable Acres	Site Sizes				
			< 2 ac.	2-10 ac.	10-30 ac.	30-50 ac.	Total
Springbrook Employment	Light Manufacturing or Industrial Office	23		1	1		2
Sportsman Airpark[2]	Airport Industrial	22	2	4			6
Wynooski Industrial	Light Industrial	10	1	2			3
Elliot Road Industrial	Light Manufacturing or Industrial Office	1	1				1
Total		**56**	**4**	**7**	**1**		**12**

The 2009 UGB contains 56 buildable industrial acres. As shown in Table IV-12, Newberg has an identified need for one 30-50 acre site, two 10-30 acre sites, 45 acres of 2-10 acre sites, and 18 acres of sites under 2 acres in size. This means that Newberg's UGB should be expanded by approximately 127

[2] The Sportsman Airpark contains on large 55-acre property that contains the existing airport, plus approximately 10.8 acres of buildable industrial land. The approved Sportsman Airpark Master Plan includes a plan for developing the buildable industrial land into an industrial park with aviation related uses. This site was counted in the 2-10 acre category, even though it contains slightly over 10 acres of buildable land, because the approved master plan envisions further division, and the aviation related uses are more likely to be separate smaller firms rather than one large firm.

buildable industrial acres to meet the future employment need. This needs to include a 30 to 50 acre site, a 10 to 30 acre site, and industrial park sites totaling approximately 63 buildable acres.

Table IV-12: 2010-2030 Industrial Land Supply and Need

Size Range (Acres)	Number of Sites - 2009 UGB	Buildable Acres - 2009 UGB	2010-2030 Needed Sites	2010-2030 Needed Gross Buildable Acres	2010-2030 Deficit # of Sites	2010-2030 Deficit Gross Buildable Acres
<2	5	6	21	24	(16)	(18)
2 to 10	7	30	13	75	(6)	(45)
10 to 30	1	20	2	42	(1)	(22)
30 to 50	0	0	1	42	(1)	(42)
Total	**13**	**56**	**37**	**183**	**(24)**	**(127)**

Source: Winterbrook Planning, City of Newberg

~~The industrial buildable land inventory inside the current UGB has approximately 159 acres. While this may seem to be a large supply, it is disadvantaged by a number of elements. First, it consists mostly of small, scattered sites, with only 8 parcels larger than 5 acres and only 3 parcels that are 20 acres or larger. Second, several sites are hindered because of proximity to residential neighborhoods or other factors. Thus, some of the industrial should be rezoned for other uses. Third, a significant part of the "buildable" land is in fact in industrial use, such as storage yards. Also, the land need is adjusted to account for existing industrial uses that are displaced by the Newberg Dundee Bypass.~~

~~**Table IV-11. 2025 Industrial Land Supply and Need**~~

~~Industrial Site Size~~	~~2025 Need~~	~~Supply~~	~~Surplus/(Deficit)~~
~~Small/Medium sites (< 20 ac)~~	~~50 ac~~	~~99 ac~~	~~49 ac~~
~~Large sites (20+ ac)~~	~~100 ac~~	~~60 ac~~	~~(40) ac~~

~~Inside the current UGB, the only one large site (20 acres) that is viable in the long term is at the Sportsman Airpark. Two other sites are better suited for other uses long term. Therefore, Newberg needs to look to add additional industrial land to its UGB.~~

3. 2040 Industrial Land Supply and Need

There is a projected need for 1,170 industrial employees for the period 2031-2040. At an average of 11 employees/acre, which represents a 10% increase in industrial density as a further efficiency measure, plus 10% of the land area for right-of-way (based on an a mix of small and large sites), this will generate an additional need for 117 gross buildable acres of land for the period 2031-2040.

~~The period 2025 -2040 will have additional needs for industrial lands. There is projected to be a need for 37 acres of additional small/medium sites. In addition, there will be a need for six large industrial sites (20 acres each).~~

~~Table IV-12. 2026-2040 Industrial Land Supply and Need~~

~~Industrial Site Size~~	~~2026-2040 Need~~
~~Small/Medium sites (< 20 ac)~~	~~37 ac~~
~~Large sites (20+ ac)~~	~~120 ac~~

Exhibit C: Findings to Ordinance 2010-2723

The revised Economic Opportunities Analysis (EOA) must comply with the Newberg Comprehensive Plan, Statewide Planning Goal 9, ORS 197.638, and ORS 197.712. Below are the findings to these criteria.

I. Newberg Comprehensive Plan

Section H. The Economy – Goal: To develop a diverse and stable economic base.

Finding: The EOA is considered the "implementation" portion of Section H in the Comprehensive Plan, and as such it strives to implement this goal and its associated policies in Section H of the Newberg Comprehensive Plan. The EOA contains many elements, including information on local and regional targeted industries, the site size and suitability characteristics of those targeted industries, Newberg's comparative advantages and disadvantages, and an economic development strategy with actions to address the comparative advantages and disadvantages to strengthen Newberg's standing in the regional marketplace to attract the targeted industries. The action items found in the EOA are linked back directly to the policies they implement from Section H of the Comprehensive Plan. All of these things combine to work toward meeting the goal of developing a diverse and stable economic base. This goal could not be met without a revised and updated EOA because economic statistics and market forces change over time, requiring constant monitoring and updating for the economic strategy to stay relevant. Therefore, the revised and updated EOA best helps implement this goal of the Comprehensive Plan.

II. Statewide Planning Goal 9: Economic Development – To provide adequate opportunities throughout the state for a variety of economic activities vital to the health, welfare, and prosperity of Oregon's citizens.

Comprehensive Plans for urban areas shall:

1. Include an analysis of the community's economic patterns, potentialities, strengths, and deficiencies as they relate to state and national trends;
2. Contain policies concerning the economic development opportunities in the community;
3. Provide for at least an adequate supply of sites of suitable sizes, types, locations, and service levels for a variety of industrial and commercial uses consistent with plan policies;
4. Limit uses on or near sites zoned for specific industrial and commercial uses to those which are compatible with proposed uses.

A.1. A principal determinant in planning for major industrial and commercial developments should be the comparative advantage of the region within which the developments would be located. Comparative advantage industries are those economic activities which represent the most efficient use of resources, relative to other geographic areas.

A.2. The economic development projections and the comprehensive plan which is drawn from the projections should take into account the availability of the necessary natural resources to support the expanded industrial development and associated populations. The plan should also take into account the social, environmental, energy, and economic impacts upon the resident population.

A.3. Plans should designate the type and level of public facilities and services appropriate to support the degree of economic development being proposed.

A.4. Plans should strongly emphasize the expansion of and increased productivity from existing industries and firms as a means to strengthen local and regional economic development.

A.5. Plans directed toward diversification and improvement of the economy of the planning area should consider as a major determinant, the carrying capacity of the air, land and water resources of the planning area. The land conservation and development actions provided for by such plans should not exceed the carrying capacity of such resources.

Finding: The EOA is Section 12 (The Economy) of the Inventory of Natural and Cultural Resources, which is the base document that the Comprehensive Plan and its goals and policies is based on. The revised EOA includes the elements required above: an analysis of Newberg's economic patterns, forecasts, comparative advantages and disadvantages (strengths and deficiencies); provisions for an adequate supply of sites of suitable sizes, types, locations, and service levels for a variety of industrial and commercial uses consistent with plan policies; and compatibility requirements that limit uses on or near sites zoned for specific industrial and commercial uses to those which are compatible with proposed uses. The Newberg Comprehensive Plan contains policies concerning the economic development opportunities in the community.

The revised EOA includes a robust discussion of Newberg's comparative advantages and disadvantages related to the regional economic marketplace. Newberg has identified four business clusters that are the foundation of its economy and that economic development efforts will be focused on, including: manufacturing, health care, higher education, and the wine/tourism industry. The updated buildable land inventories in the revised EOA indicate a shortage of both types of land; the City will make future efforts to remedy this situation to ensure Newberg's economic health. The Comprehensive Plan considers the availability of resources to support a growing population, and has goals and policies to ensure that adequate provisions are made. In addition, the City has a Transportation System Plan, a Sewer Master Plan, a Water Master Plan,

and a Storm Drainage Master Plan that detail the type and level of public facilities for current and future developments.

The first strategy of Newberg's economic development efforts focuses on retention and expansion of existing businesses. Several of the home-grown industries that reflect Newberg's four main business clusters have become national and international leaders in their respective fields. The revised EOA details Newberg's commitment to its existing businesses and firms, including a list of strategies and actions that are intended to help Newberg assist its local economic partners.

III. <u>ORS 197.638 Department of Land Conservation and Development may request review by Economic and Community Development Department of local inventory and analysis of industrial and commercial land.</u>

(1) Upon request of the Department of Land Conservation and Development, the Economic and Community Development Department shall review the inventory and analysis of industrial and commercial land, and measures taken to address the land needs, required of certain local governments under ORS 197.712. The review shall address the likely effect of measures developed by a local government on the adequacy of the supply of sites and opportunities to satisfy needs identified under ORS 197.712.

(2) The Land Conservation and Development Commission and the Director of the Department of Land Conservation and Development shall consider the review and any recommendations of the Economic and Community Development Department when determining whether a local government has complied with the statewide land use planning goals and the requirements of ORS 197.712. [1999 c.622 §13]

Finding: Newberg worked closely with its regional Business Development Officer, Tom Fox, from the Oregon Business Development Department (formerly the Oregon Economic and Community Development Department) regarding the analysis of industrial and commercial land needs. Mr. Fox reviewed the information in the revised EOA, including the site size ranges by targeted industry cluster and sector, site size distribution by firm employment, and required site suitability characteristics, and concurs that they are viable for firms seeking sites in Oregon and for Newberg's targeted industries. In addition, he noted that the City should have success in expanding and attracting businesses in the targeted industry clusters if they follow the site size and suitability criteria for development sites (see letter from Tom Fox, dated December 1, 2009 – Attachment 2 to the staff report).

IV. <u>ORS 197.712 Commission duties; comprehensive plan provisions; public facility plans; state agency coordination plans; compliance deadline; rules.</u>

(1) In addition to the findings and policies set forth in ORS 197.005, 197.010 and 215.243, the Legislative Assembly finds and declares that, in carrying out statewide comprehensive land use planning, the provision of adequate opportunities for a variety of economic activities throughout the state is vital to the health, welfare and prosperity of all the people of the state.

(2) By the adoption of new goals or rules, or the application, interpretation or amendment of existing goals or rules, the Land Conservation and Development Commission shall implement all of the following:

(a) Comprehensive plans shall include an analysis of the community's economic patterns, potentialities, strengths and deficiencies as they relate to state and national trends.
(b) Comprehensive plans shall contain policies concerning the economic development opportunities in the community.
(c) Comprehensive plans and land use regulations shall provide for at least an adequate supply of sites of suitable sizes, types, locations and service levels for industrial and commercial uses consistent with plan policies.
(d) Comprehensive plans and land use regulations shall provide for compatible uses on or near sites zoned for specific industrial and commercial uses.
(e) A city or county shall develop and adopt a public facility plan for areas within an urban growth boundary containing a population greater than 2,500 persons. The public facility plan shall include rough cost estimates for public projects needed to provide sewer, water and transportation for the land uses contemplated in the comprehensive plan and land use regulations. Project timing and financing provisions of public facility plans shall not be considered land use decisions.
(f) In accordance with ORS 197.180, state agencies that provide funding for transportation, water supply, sewage and solid waste facilities shall identify in their coordination programs how they will coordinate that funding with other state agencies and with the public facility plans of cities and counties. In addition, state agencies that issue permits affecting land use shall identify in their coordination programs how they will coordinate permit issuance with other state agencies and cities and counties.
(g) Local governments shall provide:
(A) Reasonable opportunities to satisfy local and rural needs for residential and industrial development and other economic activities on appropriate lands outside urban growth boundaries, in a manner consistent with conservation of the state's agricultural and forest land base; and
(B) Reasonable opportunities for urban residential, commercial and industrial needs over time through changes to urban growth boundaries.

(3) A comprehensive plan and land use regulations shall be in compliance with this section by the first periodic review of that plan and regulations. [1983 c.827 §17; 1991 c.612 §17]

Finding: The revised EOA includes a comparative analysis of Newberg's economic patterns, potentialities, advantages and disadvantages. In addition, it features a section that discusses Newberg's industrial and commercial land needs and supply, including site size ranges and suitability characteristics. The Comprehensive Plan contains policies concerning economic development opportunities in the community and provisions for compatibility with industrial and commercial uses. The City also has several public facility plans, including the Transportation System Plan, the Sewer Master Plan, the Water Master Plan, and the Storm Drainage Master Plan. The revised EOA, with its updated buildable land inventories and other information, provides the basis for the City to meet future urban land needs over time through changes to the urban growth boundary.

V. OAR 660-009-0015 – Economic Opportunities Analysis

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

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

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

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

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

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

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

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

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

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

(4) Assessment of Community Economic Development Potential. The economic opportunities analysis must estimate the types and amounts of industrial and other employment uses likely to occur in the planning area. The estimate must be based on information generated in response to sections (1) to (3) of this rule and must consider the planning area's economic advantages and disadvantages. Relevant economic advantages and disadvantages to be considered may include but are not limited to:
(a) Location, size and buying power of markets;
(b) Availability of transportation facilities for access and freight mobility;
(c) Public facilities and public services;
(d) Labor market factors;
(e) Access to suppliers and utilities;
(f) Necessary support services;
(g) Limits on development due to federal and state environmental protection laws;
(h) Educational and technical training programs.

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

Finding: The revised EOA contains the information described n sections (1) through (4) of OAR 660-009-0015. Section II of the EOA is the Economic Trends Analysis, which included the following items: national, state and regional trends; regional economic development industry clusters and target industries; Yamhill County agri-business; regional industrial land availability; Newberg population profile; and Newberg employment characteristics. Newberg has identified four business clusters that are the foundation of its economy – manufacturing, health care, higher education, and the wine/tourism industry – and the majority of its economic development efforts will go into recruitment and expansion of existing businesses. Most businesses associated with Newberg's targeted business clusters have similar site suitability characteristics they need to develop. In the revised EOA, Tables 12-19 through 12-22 and Table 12-29 illustrate the site size ranges by targeted industrial cluster and sector, targeted industry clusters and sectors by site size ranges and existing Newberg industrial firm examples, site size distribution by firm employment (2010-2030), required industrial site suitability characteristics, and required commercial site suitability characteristics.

The revised EOA includes an inventory of industrial and other employment lands within the urban growth boundary. The buildable land inventories have been updated, and the existing industrial and commercial areas are labeled and discussed in Section V, Industrial and

Commercial Land Needs and Supply. The existing industrial and commercial areas within the UGB are also shown graphically on Figure 12-3, Buildable Industrial Land, and Figure 12-4, Commercial Areas and Buildable Commercial Land.

Section III of the revised EOA is the Assessment of Community Economic Development Potential. This section includes employment projections, Newberg's comparative advantages and disadvantages, and a discussion of Newberg's special opportunities to capitalize on its unique niche geographically and in the regional marketplace. Newberg's comparative advantages and disadvantages include the following:

Advantages:

- Small town quality of life
- Access to quality education and skills training
- Established and growing industry clusters
- Strong local support for business and employment opportunities
- Proximity to the Portland Metropolitan region
- Future Newberg-Dundee Bypass
- Oregon's statewide planning goals

Disadvantages:

- Transportation and access issues
- Lack of suitable employment sites
- Highly parcelized land outside UGB limits ability to meet employment site requirements
- Stressed commercial sector
- Retail dollar leakage due to close proximity to metropolitan area markets
- Market pressures on SP Newsprint
- Oregon's statewide planning goals

Newberg's economic development strategy is discussed in Section IV of the revised EOA. This section includes actions to capitalize on Newberg's comparative advantages and to address the comparative disadvantages.

CITY OF NEWBERG CITY COUNCIL MINUTES
FEBRUARY 1, 2010
7:00 P.M. MEETING
PUBLIC SAFETY BUILDING TRAINING ROOM
401 EAST THIRD STREET

A Work Session was held prior to the meeting. A presentation was given by the Newberg Downtown Revitalization Committee (NDRC) for a budget proposal. No decisions were made.

I. CALL MEETING TO ORDER

Mayor Bob Andrews called the meeting to order at 7:01 PM.

II. ROLL CALL

Members Present:	Mayor Bob Andrews	Denise Bacon	Bob Larson
	Stephen McKinney	Bart Rierson	Marc Shelton
	Wade Witherspoon		
Staff Present:	Daniel Danicic, City Manager		Terrence Mahr, City Attorney
	Barton Brierley, Planning and Building Director		Norma Alley, City Recorder
	Jessica Nunley, Assistant Planner		Jennifer Nelson, Recording Secretary
	David Beam, Economic Development Planner		
Others Present:	Julie Fugate, Sid Friedman, Sydney C. Wermlinger, Lewis Schaad, Grace Schaad, Vicki Shepherd, Amy L. Does, Lee Does, Saj Jivanjee, and Ken Wegter.		

III. FLAG CEREMONY PERFORMED BY BOY SCOUT TROOP 265

The Flag Ceremony was performed.

IV. PLEDGE OF ALLEGIANCE

The Pledge of Allegiance was performed.

VII. APPOINTMENTS

Consider a motion approving **Resolution No. 2010-2884** appointing Larry Blake, Jr. as the Newberg Municipal Judge.

MOTION: Shelton/Rierson to approve **Resolution No. 2010-2884** appointing Larry Blake, Jr. as the Newberg Municipal Judge. (7 Yes/0 No) Motion carried.

Mayor Andrews swore in Mr. Larry Blake, Jr. as Newberg's Municipal Judge.

V. CITY MANAGER'S REPORT

Mr. Daniel Danicic, City Manager, gave updates on the selection process for a general contractor for the animal shelter and the money granted to the Yamhill County Housing Authority, which was received by the City of Willamina. He spoke of efforts being made with the County to develop a Continuity of Operations Plan in the

event of a natural disaster. He informed the Council the Dayton pump station overflowed this weekend because of equipment failure; the Oregon Department of Environmental Quality (DEQ) was notified and clean up efforts are being made. He noted this as an example of why the City has been putting together the rate structures it has because they have been dealing with problems like this on a regular basis.

VI. PUBLIC COMMENTS

None.

VIII. CONSENT CALENDAR

1. Consider a motion approving a **Proclamation** declaring the week of February 7, 2010, as Scouting Anniversary Week.

2. Consider a motion approving **City Council Minutes** for January 4, 2010.

MOTION: Shelton/McKinney to approve the Consent Calendar including a proclamation declaring the week of February 7, 2010, as Scouting Anniversary Week and the City Council Minutes for January 4, 2010. (7 Yes/0 No) Motion carried.

Mayor Andrews presented the proclamation to Boy Scout Troop 265.

IX. PUBLIC HEARING

Consider a motion approving **Ordinance No. 2010-2723** adopting the revised Newberg Economic Opportunities Analysis and amends the Comprehensive Plan.

TIME – 7:17 PM

Mr. Barton Brierley, Planning and Building Director, presented the staff report assisted by Ms. Jessica Nunley, Assistant Planner (see official meeting packet for full report).

Mayor Andrews asked if some of the land parcels are owned by private parties, if those owners have prerogative, and if the City would have control over the development. Staff replied some are privately owned and each owner can decide what is appropriate for them; there could be issues with landowners who do not wish to sell.

Mayor Andrews asked for an interpretation of the growth percentage projections. Staff replied the projections were not based on a fixed number and included other components. They were adopted in 2005 and last year the actual numbers were only off by eleven people over four years, so they are really close.

Councilor Wade Witherspoon suggested three minor corrections to the report. On page 24 under new business recruitment he wished to expand the phrase "bring new wealth to the community" to include the idea of increasing livability. On page 35 in the third paragraph he asked staff to elaborate on how the shared vision for Yamhill County is being worked on together; staff replied it was a quote from the community development plan and they are doing this through things like the City/County dinner and phone calls to business prospects. Councilor Witherspoon also asked for changes to be made to page 58 to expand the phrase "Newberg continues to support Newberg School District, George Fox University, and Portland Community College" to include "all schools in Newberg".

Councilor Marc Shelton asked if adjustments were being made to the population estimates based on the economic climate and homes not being built on land annexed into the City. Staff replied the amendments are simply to update the information from the 2006 numbers to the current 2009 data.

Councilor Stephen McKinney spoke of using the population figures now to determine livability and sustainability and to control the kind of community they all envision for Newberg when the growth and changes start to occur.

Councilor Shelton asked staff if they were adjusting the figures for utility expansion based on the current economic climate. Staff replied there may be a slight reduction in growth because of the economy but they are sticking with the numbers because they will be accurate over time.

Discussions followed as to whether or not to accept several pieces of written testimony submitted this evening. Many of the Councilors felt it was too much (over ten pages) to be comfortable accepting it into the record when they have not had time to read it.

Councilor Shelton asked the citizens who submitted the written testimony if they would be able to cover the information during their oral testimony.

Mr. Sid Friedman, representing 1000 Friends of Oregon, stated he planned to summarize the material he submitted, but would not go into the details.

Mr. Lee Does replied he was planning to give a different perspective during his oral testimony than what was in the written testimony he submitted. He also argued there was nothing published by notice or on the website that there was a deadline for submitting written testimony.

Ms. Amy L. Does stated her written testimony was exactly what she planned to say tonight.

MOTION: Shelton/Larson to not accept the written comments into the record.

Councilor Bart Rierson did not feel he could fairly deliberate or comment on the written material submitted this evening since it was much more than a single page. He hoped the citizens could cover the material during their verbal testimony.

Councilor McKinney spoke of upholding the actions of the previous Councils for over eight years in order to protect the integrity of the process by not accepting the written material; but, he also did not feel it nullified the citizens' efforts or points of view since they would still be heard tonight.

Councilor Witherspoon asked the City Attorney to explain what the danger was in accepting something this late when it could not be read before making a decision.

Mr. Terrence Mahr, City Attorney, explained that if it is accepted and not read, it becomes evidence that by law must be taken into account. There could be something within the material not addressed which could have changed the outcome. There is a rule in place stating the Council can reject any written testimony and the citizens are present to testify, so Council has the right to reject it.

Mr. Friedman argued the published notice in The Graphic and the website both had nothing about limiting written material and if the concern was to be able to read the material, this is a legislative hearing and there are no deadlines stating action must be taken tonight; deliberations could be extended to another evening.

Mayor Andrews stated there are published Council rules which state speakers may submit written material at a meeting but the Council can choose to consider it or not.

Councilor Shelton felt it was not necessary to accept the written testimony since the citizens were present to speak this evening.

VOTE: To not accept the written comments into the record. (5 Yes/1 No [Andrews]/1 Abstain [Witherspoon]) Motion carried.

Mayor Andrews opened public testimony.

Ms. Julie Fugate, representing Dennis and Janice Pierce, Roland and Goldie Flock, and Connie Grey, said she supported the Economic Opportunities Analysis (EOA) and spoke of statewide planning goal 9 and the need to prevent a housing shortage for the high population numbers resulting from the large number of children from the Baby Boom generation. She recommended adopting the EOA and amendments as presented to plan for job growth and housing.

Opponents:

Mr. Friedman stated he had strong objections to the written testimony not being included. He spoke of targeting Newberg for manufacturing as being wishful thinking and urbanization of farmland into industrial land. He spoke of the high sales and profits from Newberg farming and the required site characteristics in the EOA being reverse engineered. He talked about the parcels sizes and how it limits smaller businesses on smaller sites. He spoke of the EOA excluding properties adjacent to large tracts of agricultural land and any truck traffic to the downtown even though 99W is considered a major arterial on the transportation plan and as a freight route on the Oregon Highway Plan which he says is inconsistent. He said the job density is lower than what is in the text and spoke of problems with the commercial site characteristics not being explained so therefore not being justified. He spoke of items not being properly coordinated with Yamhill County because they are not in the comprehensive plan or referenced in any documents. He also argued that the additional amendments to the comprehensive plan were not included in the notice for the hearings and no explanations provided for citizens to determine if they were reasonable so the amendments are not justified. Finally, he argued the rule should be sited about submitting written testimony.

Ms. Sidney Wermlinger spoke of designing roads to go from the farm to the market and access to I-5, travel time, and road to the proposed manufacturing park already being overloaded which is contrary to the report. She said farmland is a precious commodity and wished to save the farmland from the label of being "shovel ready".

Mr. Lewis Schaad expressed concern for industrial and commercial building land citing the City of Gresham as an example of bringing in land for one purpose that goes undeveloped. He spoke of the lack of infrastructure making it difficult to make the land appealing to industry. He spoke of energy efficiency and sustainability industries that do not require large parcels of flat farmland. He said farmland needs to be protected until the time comes when the business comes and said that just because someone chooses to farm does not make that farmland.

Ms Grace Schaad testified that the EOA is being used to "reverse engineer" the destruction of prime farmland that should be used for providing food for human consumption. She spoke of characteristics being identified for industry that will be needed some time in the future and saying that saying only land within the South Industrial Master Plan meets them is bogus. She suggested looking for land already available for infill or refill to attract manufacturing to the City such as the vacated "Suntron" campus and other examples. She spoke of valuing the agricultural lands for eating locally, attracting tourists, and providing the "small town quality of life" desired.

Ms. Vicki Shepherd spoke of different areas in Oregon being known for something and stated that Newberg is known for its wine industry. She said agriculture is Oregon's second largest industry and it is a vital part of what makes Newberg the city it is. She felt we should be managing our natural resources in a way that allows future generations to produce crops to sustain their families. She encouraged Council to not approve the EOA.

Ms. Amy L. Does, Ph. D., stated the EOA has faults because it pushes acreage-intensive manufacturing that will displace agriculture. She spoke of agriculture's importance to economic sustainability and tourism and how urban growth boundaries are causing more agriculture to be lost. She encouraged the City to reevaluate the EOA and the amount of acreage really necessary for Newberg's future.

Mr. Lee Does spoke of working in robotics and the industries that survive being ones that cannot be taken overseas. He spoke of things grown here like heirloom tomatoes and how agriculture is recession proof. He spoke of what is doing well in Newberg like providing education and tourism. He did not agree with committing lands for something that does not yet exist which would cause farmers to disinvest in their property in order to hold out for the payoff from developers. He also objected to the written testimony not being accepted.

Mr. Saj Jivanjee spoke of his frustration with the analysis and the idea of creating industrial land from land that already has current value. He felt more focus should be on sustainability and spoke of the unique topography of the area not being conducive for industrial use, especially when it is successful agriculturally. He said the world is changing and people need to become smarter and more scientific about sustainability. He felt industry is archaic and felt more could be done with one computer rather than huge parcels of industrial land.

Councilor Denise Bacon spoke of California being dependent on agriculture and the problems they are experiencing with climate changes and lack of water.

Mr. Jivanjee argued California over-consumed and not they are paying the price. He felt Newberg should go with the global trend to create ways to sustain and restore natural resources, not develop fear-based models for a big factory to make everyone live happily ever after. He suggested creating something unique. He also spoke of rethinking housing so that not every person needs "one ton of metal around their neck to buy one piece of bread".

Mr. Ken Wegter said he wished to speak on behalf of the wildlife in the area. He felt the growth was limited by the nature of the area and spoke of the land's attractiveness that brings people in. He did not feel Newberg would attract the industries because of its location and felt the majority of people come here for the agriculture. He encouraged the Council to consider the wildlife.

Mr. Brierley responded to some of the comments made during the testimony about industry being adjacent to residential areas causing conflict in the past and protecting the downtown from increased truck traffic. In regards to Gresham they lacked the services and were unable to attract industry which is a lesson to be learned from for Newberg, which is why site suitability was put into the report. He spoke of the Nike apparel warehouse as an example of how Newberg benefits from their executives eating, shopping and playing golf here. He spoke of agriculture being important and mentioned a food processing business that almost had to leave Newberg because of the lack of suitable industrial sites to expand. He said he appreciated the testimony and recommended adopting the ordinance with the changes previously mentioned. On page 24 in paragraph two will change from "bring new wealth" to "bring new resources to maintain and improve the livability of the community". On page 58 in the second bullet changes are as follows "to support the Newberg School District, George Fox University, Portland Community College, and other public and private schools in efforts to train and motivate".

Councilor Shelton asked staff to elaborate on the work that was recognized by the state land use board. Staff spoke of the previous ad hoc committee on Newberg's future which held public events and received input on what residents of Newberg wanted in terms of growth and industry. The main goal was to make Newberg a place to live and work and land needed to be provided to do this. The south industrial plan areas were recommended as the vision of the ad hoc committee and as a result of this extensive public process.

Councilor Bacon asked what was being done to bring businesses here.

Mr. David Beam, Economic Development Planner, spoke of the recruitment process for potential leads being conducted by marketing teams from companies via websites. Proposals are submitted if matches are found. But the primary way is through business expansion of already established companies.

Mayor Andrews asked if the EOA was carved in stone if it is adopted tonight. Staff replied it is not permanent considering this is a revision of the 2006 version and changes are being made based on current information and in the future modifications can be made to adapt to changes.

Councilor Shelton clarified this was just an amendment to what was approved in 2006 by a previous council. Staff replied this was correct.

Mayor Andrews closed the public hearing and recessed at 9:26 PM. He reconvened at 9:35 PM.

MOTION: Shelton/Larson to approve **Ordinance No. 2010-2723** adopting the revised Newberg Economic Opportunities Analysis and amends the Comprehensive Plan read by title only.

Councilor McKinney thanked the speakers and clarified approving this motion is not asking him to vote for or against agriculture or industry and felt the EOA represented a small portion of the Council's goals. He is thankful it is a dynamic document, not static, so changes can be made in the future to reflect what actually happens. He felt this was a springboard to go from and spoke of the need for incremental steps.

Councilor Bacon said she appreciated the work done by both sides and spoke of a vision that needs to consider both the environment and the citizens without jobs. She said this decision will not pave every inch of land tomorrow. If the manufacturing comes then land will be available, until then it can be farmed. She supported the motion.

Councilor Rierson supported the ordinance based on the work that has been done before tonight and the support received from the citizens of Newberg to protect the small town quality as well as providing jobs for the families that live here.

Councilor Witherspoon recognized the work done by the Planning Commissioner (PC) which heard both sides and wrestled with the testimonies. He saw that it was a difficult process by reading minutes. He supports the ordinance.

Councilor Shelton appreciated the citizens stepping up and doing work behind the scenes. He also said he is not against agriculture at all, nor is he against business and economic opportunity. He felt staff heard the voices of the citizens of Newberg and he appreciated the vision and work that went into a plan that makes sense and works down the road.

Councilor Larson said he was on the council that approved this in 2006 and he approves of the amendments tonight. He said so much has to be done yet and so many changes have happened, but he feels it is mostly for the good.

Mayor Andrews said he also adopted the original and that these are only updates. He was concerned for viable businesses being lost from Newberg because their needs could not be met here. He is in favor of the ordinance and amendments.

VOTE: To approve **Ordinance No. 2010-2723**. (7 Yes/0 No) Motion carried.

X. NEW BUSINESS

None.

XI. COUNCIL BUSINESS

TIME – 9:59 PM

Brief discussions followed about rumors of making McKay Road a toll road and a comment about moving truck traffic off of 99W as a Council goal that may conflict with how the road is designated at the state level.

XII. ADJOURNMENT

The meeting adjourned at 10:12 PM.

ADOPTED by the Newberg City Council this 1st day of March, 2010.

Norma I. Alley

Norma I. Alley, City Recorder

ATTEST by the Mayor this 4th day of March, 2010.

Bob Andrews

Bob Andrews, Mayor

NEWBERG CITY COUNCIL MEETING INFORMATION

Meeting Date: February 1, 2010 **Prepared by: Norma Alley**

Councilors	**Roll Call**	**MOTION** **Topic: Consent Calendar – Boy Scouts Proclamation, Minutes for 1/4/2010**	**RESOLUTION NO. 2010-2884** **Topic: Municipal Judge Oath of Office**	**ORDINANCE NO. 2010-2723** **Topic: Economic Opportunities Analysis** **Not Accept Written Comments Into the Record**	**ORDINANCE NO. 2010-2723** **Topic: Economic Opportunities Analysis** **With Two Proposed Changes**	**Res/Ord/Order #_____** **Topic:**	**Res/Ord/Order #_____** **Topic:**	**Res/Ord/Order #_____** **Topic:**
ANDREWS, Bob, Mayor	X	YES	YES	NO	YES			
BACON, Denise	X	YES	YES	YES	YES			
LARSON, Bob	X	YES	YES	YES	YES			
McKINNEY, Stephen	X	YES	YES	YES	YES			
RIERSON, Bart	X	YES	YES	YES	YES			
SHELTON, Marc	X	YES	YES	YES	YES			
WITHERSPOON, Wade	X	YES	YES	ABSTAIN	YES			
ROLL CALL VOTES		**YES: 7** **NO: 0** **Absent: 0** **Abstain: 0**	**YES: 7** **NO: 0** **Absent: 0** **Abstain: 0**	**YES: 5** **NO: 1** **Absent: 0** **Abstain: 1**	**YES: 7** **NO: 0** **Absent: 0** **Abstain: 0**	**YES:** **NO:** **Absent:** **Abstain:**	**YES:** **NO:** **Absent:** **Abstain:**	**YES:** **NO:** **Absent:** **Abstain:**
Department Prepared Action Item:		Administration	Legal	Planning	Planning			
MOTION (1st/2nd):		Shelton/ McKinney	Shelton/ Rierson	Shelton/ Larson	Shelton/ Larson			

Revised Economic Opportunities Analysis

CITY COUNCIL HEARING
ORDINANCE 2010-2723
FEBRUARY 1, 2010

Ord 2011-2740 - Attachment 9

Staff Request

Adopt Ordinance 2010-2723 which adopts the revised Economic Opportunities Analysis and the accompanying Comprehensive Plan Amendments.

Background of the EOA

- Original EOA was adopted by City Council in 2006
- EOA is considered part of the Comprehensive Plan and implements the goals & policies in Section H (The Economy)
- Having an updated EOA ensures continued compliance with Statewide Planning Goal 9: Economic Development

Summary of EOA

- Demographic & economic statistics help us plan for future populations
- Targeted industries: manufacturing, health care, higher education, wine/tourism
- Assessment of community's economic development potential to retain & attract targeted industries
- Employment land inventories (industrial & commercial)

Summary of EOA Revisions

- Updated population, demographic, economic & employment statistics
- Economic trends analysis (national, state & regional)
- Assessment of community economic development potential
  - Employment projections
  - Comparative advantages & disadvantages
  - Special opportunities in the regional marketplace
- Economic development strategy
- Updated buildable land inventories & maps

Important Points from the EOA

- Newberg's Comparative Advantages & Disadvantages
- Economic Development Strategy
- Regional and Local Employment Projections
- Industrial and Commercial Buildable Land Supply and Need Tables and Maps

Comparative Advantages & Disadvantages

Advantages:

- Small town quality of life
- Access to quality education and skills training
- Established and growing industry clusters
- Strong local support for business & employment opportunities
- Proximity to the Portland Metropolitan region
- Future Newberg-Dundee Bypass
- Oregon's statewide planning goals

Disadvantages

- Transportation & access issues
- Lack of suitable employment sites
- Highly parcelized land outside UGB limits ability to meet employment site requirements
- Stressed commercial sector
- Retail dollar leakage due to close proximity to metropolitan area markets
- Market pressures on SP newsprint
- Oregon's statewide planning goals

Economic Development Strategy

- Two-pronged approach:
  - Retention and expansion of existing businesses
  - Recruitment of new businesses
- Strategies & actions to capitalize on comparative advantages and address comparative disadvantages
  - Implement Comprehensive Plan policies from Section H (The Economy)
- Regional collaboration
- Focus on local targeted industry clusters: manufacturing, health care, higher education, wine/tourism
- Other supportive actions that implement Comprehensive Plan policies from Section H (The Economy)

Employment Projections - Regional

- Using updated data from OR Employment Dept
- Combined employment data from Regions 2, 3, 15

Industry	2008	2018	% Change
Construction	57,410	58,600	2.07%
Manufacturing	121,270	119,200	-1.71%
Wholesale Trade	55,840	61,100	9.42%
Retail Trade	108,630	117,700	8.35%
Transportation, Warehousing & Utilities	36,480	38,300	4.99%
Information	23,500	24,200	2.98%
Financial Activities	68,970	72,300	4.83%
Professional & Business Services	81,720	88,700	8.54%
Education & Health Services	94,490	107,500	13.77%
Leisure & Hospitality	79,610	86,200	8.28%
Other Services	61,890	65,000	5.03%
Government	114,640	120,300	4.94%
Total	**904,450**	**959,100**	**6.04%**

Employment Projections - Newberg

- Using updated data from OR Emp Dept for 2008-2018
- Beyond 2018: emp growth at a rate equal to projected pop growth

Industry	2008	2009	2018	2020	2025	2030	2035	2040
Construction	642	390	656	700	798	892	1,005	1,125
Manufacturing	2,557	2,201	2,514	2,685	3,057	3,417	3,851	4,312
Wholesale Trade	97	73	106	113	129	144	162	181
Retail Trade	930	841	1,124	1,201	1,367	1,529	1,723	1,929
Transportation, Warehousing & Utilities	181	181	191	204	232	259	292	327
Information	54	45	56	60	68	76	86	96
Financial Activities	270	241	283	303	345	385	434	486
Professional & Business Services	437	321	474	507	577	645	727	814
Education & Health Services	2,766	3,285	3,147	3,361	3,827	4,278	4,821	5,398
Leisure & Hospitality	1,002	1,018	1,361	1,454	1,655	1,850	2,085	2,335
Other Services	413	409	434	463	528	590	665	744
Government	183	175	192	205	233	261	294	329
Total	**9,533**	**9,180**	**10,536**	**11,255**	**12,815**	**14,325**	**16,145**	**18,077**
Cumulative from 2009		-	1,357	2,075	3,636	5,145	6,965	8,897

2010-2030 Industrial Buildable Land Supply and Need Table

Size Range (Acres)	Number of Sites - 2009 UGB	Buildable Acres - 2009 UGB	2010-2030 Needed Sites	2010-2030 Needed Gross Buildable Acres	2010-2030 Deficit # of Sites	2010-2030 Deficit Gross Buildable Acres
<2	5	6	21	24	(16)	(18)
2 to 10	7	30	13	75	(6)	(45)
10 to 30	1	20	2	42	(1)	(22)
30 to 50	0	0	1	42	(1)	(42)
Total	**13**	**56**	**37**	**183**	**(24)**	**(127)**

- Unmet need for one 30-50 acre site, two 10-30 acre sites, 45 acres of 2-10 acre sites, and 18 acres of sites under 2 acres in size.

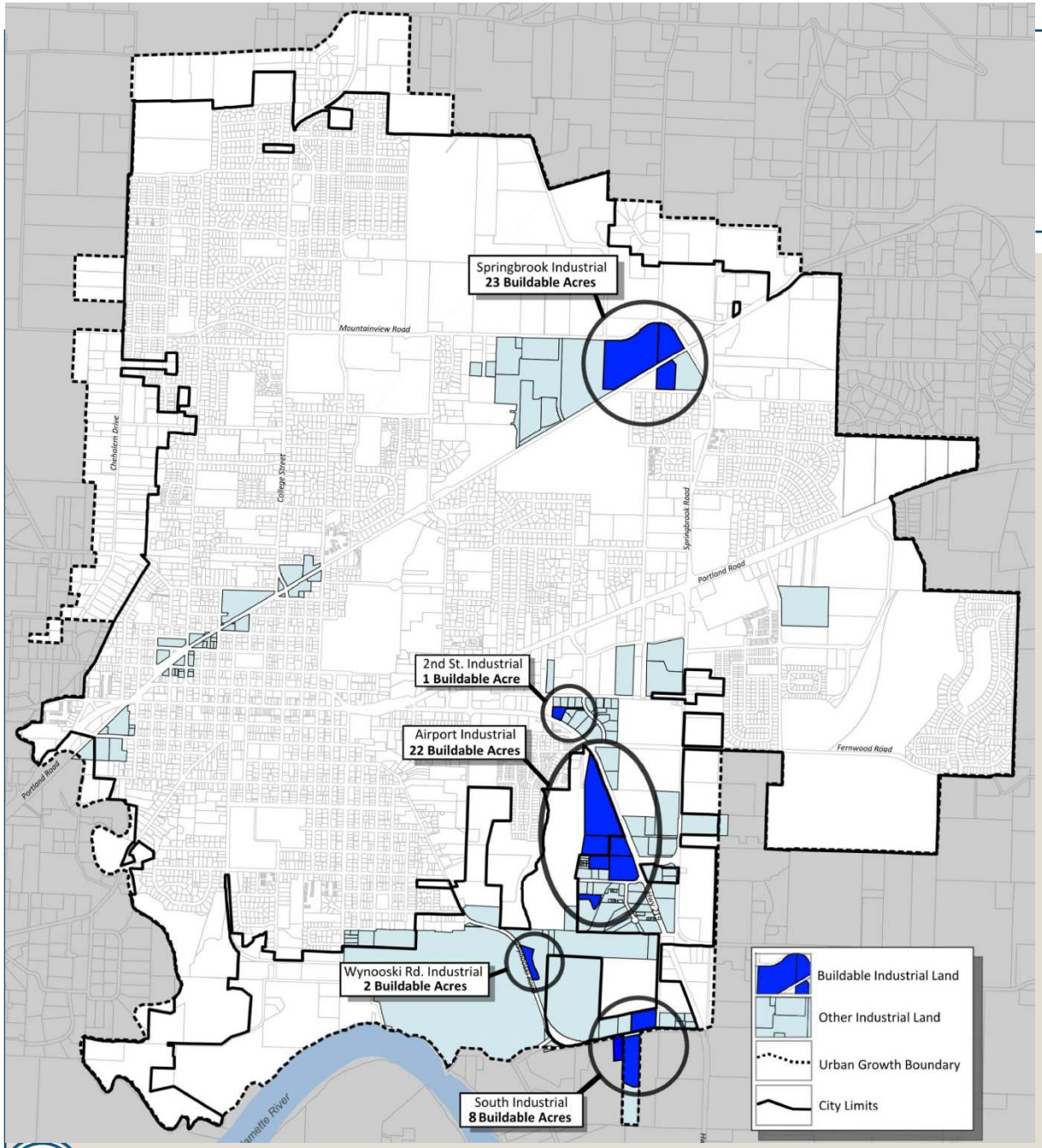
Industrial Infill Potential

- Revised table (for clarity):

Site size distribution by firm employment - 2010-2030

Employees per Firm	Percent of Employment	Number of Employees	Number of Firms	Sites Needed	Size Range (Acres)	Average Site Size (Acres)	Average ROW Need (Acres)	Gross Buildable Acres Needed
0-9	15%	246	41	21	<2	1	0.15	24
				20	*infill & redevelopment*			0
10 to 74	40%	657	19	13	2 - 10	5	0.75	75
				6	*infill & redevelopment*			0
75 to 150	15%	246	2	2	10 - 30	20	1.00	42
150+	30%	493	1	1	30 - 50	40	2.00	42
Total	100%	1,642	63	63				183

- Some land and job needs will be made up through infill
- It's possible that some employees will be sited on infill/redevelopment of existing large sites

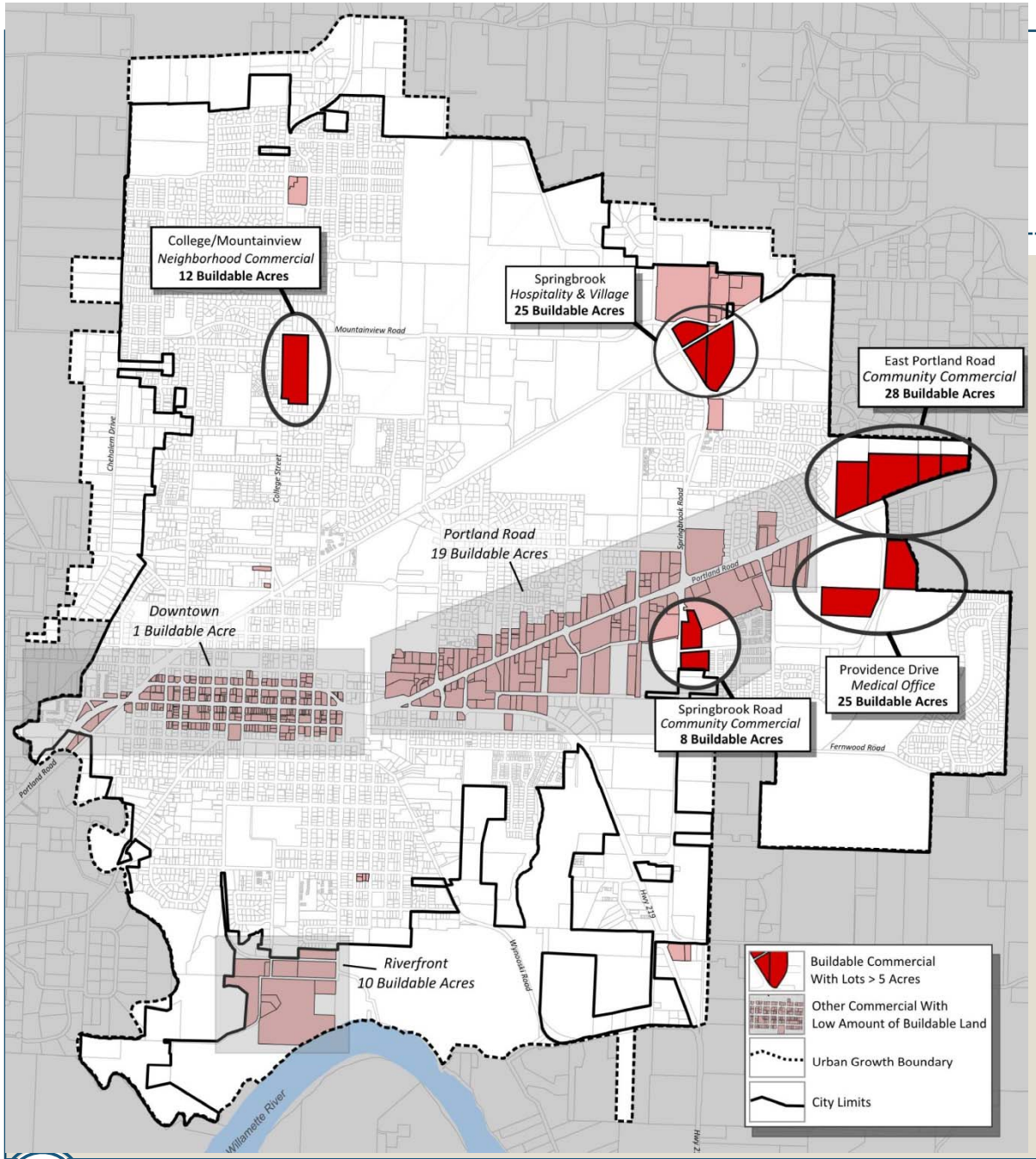


Current Buildable Industrial Land Map

2010-2030 Commercial Buildable Land Supply and Need Table (acres)

Type	Buildable Acres Needed 2010-2030	Buildable Acres in 2009 UGB	Surplus or (Deficit)	Buildable Acres Needed 2031-2040
Office	**19**	25	6	**15**
Retail	**105**	95	(10)	**61**
Total	**124**	120	(4)	**76**

- Nearly adequate supply of commercial land through 2030.
- Need 76 buildable acres for 2031-2040. Some commercial development will be made up by downtown redevelopment & infill; remainder should include a community commercial center and 2-3 neighborhood commercial centers.



Current Buildable Commercial Land Map

Comprehensive Plan Amendments

- Necessary as the Comprehensive Plan coordinates information with the EOA
- Updated population information & land need and supply information
- Add five new policies to Section H (The Economy):
  - Three policies regarding collaboration for the best utility, telecommunications, and transportation infrastructure possible (m, n, o)
  - p. The City shall strive to develop and promote a high quality of life in the community in order to attract and retain a diverse and highly skilled workforce.
  - q. The City shall foster an environment of business innovation so that the community may remain economically competitive.

Questions?

Any questions about the revised EOA or the Comprehensive Plan amendments?

Employees per Acre Methodology

- Newberg's method is not based on emp/acre. What we do is:
  - Determine the land needs of prospective employers based on our target industries
  - Calculate the **number of sites** needed for each category of firm size
  - This recognizes that an industry may initially purchase a larger site than needed for current needs, but will infill over time
  - Multiply: number of sites needed x average site size by firm = total acreage needed
- An average number of employees per acre may be calculated, but this factor is not used to determine acreage needs
  - 2010-2030 average employee per acre = ~10
  - 2031-2040 average employee per acre = 11 (estimated because site size needs are not yet known)
  - These averages are typical for businesses in Newberg

Report Timeline – 20 to 30 Years

- A lot of planning is to be prepared for the future – so we can shape what our community looks & feels like
- Not all going to happen tomorrow, or even soon
- To give some perspective…In 1990 (20 years ago):
  - The Simpsons began airing
  - The first web page was published
  - Operation "Desert Shield" began in Kuwait
  - Hubble telescope sent into space
  - Popular music: Vanilla Ice, Whitney Houston, Garth Brooks
  - Popular films: Home Alone, Ghost, Die Hard 2
  - President: George H.W. Bush
  - U.S. enters a major recession
  - Newberg population: 13,086

FILE #: _____

MEETING TYPE:
- ☐ City Council
- ☐ Planning Commission
- ☐ NUAMC
- ☐ NDRC
- ☑ Other News of Newberg

CITY OF NEWBERG
AFFIDAVIT OF NOTICING

REFERENCE ATTACHED LIST(S)/NOTICE(S)

I, Tami Bergeron, on behalf of the City of Newberg, Oregon, do hereby certify that the attached Notice of Public Hearing was:

a. Mailed to the attached list of ☑ citizens / ☐ property owners by United States mail, postage prepaid on 01/15/2010;

b. Emailed to the attached list of ☑ citizens / ☐ property owners on 01/15/2010;

c. Posted on the ☒ website / ☐ site on (Jessica 01/20/10);

d. Posted in four public locations (City Hall, Library, Fire Station, Public Safety Building) on _____;

e. Noticed in the Newberg Graphic on _____;

Dated emailed to Graphic: _____

Confirmation that ad will run by: _____ _____
Name *Date*

Tamara A Bergeron — *Signature*
Office Mgr — *Title*
01/18/2010 — *Date*

Date notice of decision mailed (after public hearing): _____

K:\WP\COMMON\FormsCD\Plan div forms\Affidavit of Noticing 10-2008.doc
TAB--03/02/2009

First Name	Last Name	Business Name	Street #	Dir Prefix	eet Na	Dir Suffix	Bldg	City	State	Zip Code	Email	Prefer Email?	Prefer Mail?	Mail Returned	Date Address Updated	omer Req Removal from Ma
Ghizzone Trusts			30475	NE	s			Newberg	OR	97132		FALSE	TRUE	FALSE		
Gary	Allen	Newberg Graphic	109	N	ol St.			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	12/27/2007	
Mike	Allen		1709		berry			Newberg	OR	97132		FALSE	TRUE	FALSE		
Chris	Andrews		207	SW	Gree			Newberg	OR	97132		FALSE	TRUE	TRUE	01/10/2008	
Marv & Kathy	Ankele		14465	NE	Hill			Newberg	OR	97132		FALSE	TRUE	FALSE		
Scott & Susan	Ankeny		24000	NE	Yam			Newberg	OR	97132		FALSE	TRUE	FALSE		
Earnest	Annas		21755	NE	en			Dundee	OR	97115		FALSE	TRUE	TRUE	02/12/2008	
Rory & Lori	Antis		24501	NE	240			Newberg	OR	97132		FALSE	TRUE	FALSE		
Michael	Ard	Lancaster Engineering	321	SW	Ave		400	Portland	OR	97204		FALSE	TRUE	FALSE		
Gilbert	Arendt		878		nwoo			Salem	OR	97301	no such email address	FALSE	TRUE	TRUE		
Frances & Bonnie	Atteberry		13750	NE	Shor			Newberg	OR	97132		FALSE	TRUE	FALSE		
Peter	Backus		32925	NE	Parre			Newberg	OR	97132		FALSE	TRUE	FALSE		
Al & Angela	Baker		32065	NE	al			Newberg	OR	97132		FALSE	TRUE	FALSE		
Anita	Baker		30150	NE	onvili			Newberg	OR	97132		FALSE	TRUE	FALSE		
Bruce	Barrone		30140	NE	amin			Newberg	OR	97132		FALSE	TRUE	FALSE		
Nancy	Barrone		30140	NE	amin			Newberg	OR	97132		FALSE	TRUE	FALSE		
Mark	Bartlett		14480	NE	Hill			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE		
Rick	Beaudry		30800	NE	en			Newberg	OR	97132		FALSE	TRUE	FALSE		
Esther	Bell		29555	NE	amin			Newberg	OR	97132		FALSE	TRUE	FALSE		
Calvin	Beralas		625	N	hingt			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	10/27/2008	
Helge	Berg		29601	NE	d Ln			Newberg	OR	97132		FALSE	TRUE	FALSE		
Helge	Berg		26601	NE	d Ln			Newberg	OR	97132		FALSE	TRUE	FALSE		
T.H. & Loretta	Bestwick		30575	NE	wood			Newberg	OR	97132		FALSE	TRUE	FALSE		
Yamhill Co.	Commissioners		534	NE	St			McMinnville	OR	97128		FALSE	TRUE	FALSE		
Mark & Colleen	Bourassa		23505	NE	n Rd			Newberg	OR	97132		FALSE	TRUE	FALSE		
Larry	Bowe	Providence Hospital	1001		denc			Newberg	OR	97132		FALSE	TRUE	FALSE		
Angie	Bowman		805		nvail			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE		
Todd	Brand		1300	NE	alem			Newberg	OR	97132		FALSE	TRUE	FALSE		
Eric & Juanita	Brandenburg		14450	NE	Hill			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	04/22/2009	
Mike	Brandt		525	NE	ST			McMinnville	OR	97128		FALSE	TRUE	TRUE	02/04/2008	
Chris	Brecke		200	N	ards			Newberg	OR	97132		FALSE	TRUE	TRUE	02/04/2008	
Dwayne	Britteil		620	E	St			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE		
David	Brown		24515	NE	240			Newberg	OR	97132		FALSE	TRUE	FALSE		
John	Brown		29415	NE	amin			Newberg	OR	97132		FALSE	TRUE	FALSE		
Tom & Barbara	Brown		2201	NE	alem			Newberg	OR	97132		FALSE	TRUE	FALSE		
Darryl	Burton		1007	W	dan			Newberg	OR	97132		FALSE	TRUE	FALSE		
John	Butorac		329		y	Ct		Newberg	OR	97132		FALSE	TRUE	FALSE		
Helen	Caldwell				BOX			Idyllwild	CA	92549		FALSE	TRUE	TRUE	02/12/2008	
Mark	Case				Box			Newberg	OR	97132		FALSE	TRUE	FALSE		
Michael	Cerbone	WRG Design Inc.	5415	SW	gate		100	Portland	OR	97221	sign.com	FALSE	TRUE	FALSE		
Newberg	Com		415	E	dan			Newberg	OR	97132		FALSE	TRUE	FALSE		
Linda	Chapman		23564	NE	Yam			Newberg	OR	97132		FALSE	TRUE	FALSE		
Elmer	Christensen		24065	NE	ycres			Newberg	OR	97132		FALSE	TRUE	FALSE		
Robyn	Christie		2124		pect			Newberg	OR	97132		FALSE	TRUE	FALSE		
Chris	Coleman	Coleman T. Inc.	5555	NE	mpo			St. Paul	OR	97137		FALSE	TRUE	FALSE		
Betty	Cone		270		ans			Golden	CO	1950		FALSE	TRUE	TRUE	03/16/2009	
Donald & Doris	Cooke		23720	NE	ycres			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	08/18/2009	
Nadia	Corder		3501	NE	Dr			Newberg	OR	97132		FALSE	TRUE	FALSE		
Scott & Sue	Corie		16150	NE	alem			Newberg	OR	97132	no such email	FALSE	TRUE	FALSE		
	Investments		901	N	cher		355	Newberg	OR	97132		FALSE	TRUE	FALSE		
Geoff	Crook		635		ol St	NE	0	Salem	OR	97301	no email address	FALSE	TRUE	FALSE	08/18/2009	
Jerry	Dale				Box			Newberg	OR	97132		FALSE	TRUE	FALSE		
Joyce	Damman		30160	NE	amin			Newberg	OR	97132	gadamm2@cs.com	FALSE	TRUE	FALSE		
Gary	Damman		30160	NE	amin			Newberg	OR	97132		FALSE	TRUE	FALSE		
John & Patty	David		14450	NE	g			Newberg	OR	97132		FALSE	TRUE	TRUE	07/23/2008	
Krier	Dei		8680	SE	Paul			Newberg	OR	97132		FALSE	TRUE	FALSE		
Ray	Delude	Providence Medical Center	9205	SW	es			Portland	OR	97225		FALSE	TRUE	FALSE		
Frank	Dennis		29550	NE	am			Newberg	OR	97132		FALSE	TRUE	FALSE		
Cynthia	Denny	Construction	95	W	Aven			Eugene	OR	97132		FALSE	TRUE	FALSE	11/21/2008	
William	Dickas	L.L.P.	520	SW	hill		e	Portland	OR	1329	wdickas@keirun.com	FALSE	TRUE	FALSE		
Ronald & Carol	Diehl		23430	NE	n Rd			Newberg	OR	97132		FALSE	TRUE	FALSE		
Lee & Amy	Does		10730	NE	e Rd			Newberg	OR	97132	ldoes@viclink.com	FALSE	TRUE	FALSE		
Michael & LaWanna	Douglas		11500	NE	Dr			Newberg	OR	97132		FALSE	TRUE	FALSE		
Barbara & Brian	Doyle		24001	NE	Ln			Newberg	OR	97132		FALSE	TRUE	FALSE		
Kimberly	Dunn		4505	E	and			Newberg	OR	97132		FALSE	TRUE	TRUE	07/31/2008	
Bruce & Christine	Eberle		10830	NE	enso			Newberg	OR	97132		FALSE	TRUE	FALSE		

Carrie	Eisenbrandt		137		Ct.			Newberg	OR	97132		FALSE	TRUE	TRUE	02/19/2009
Alice	Elbert		518	S	gbro			Newberg	OR	97132		FALSE	TRUE	FALSE	
Antonio	Elias		1812		St			Newberg	OR	97132		FALSE	TRUE	FALSE	
Del	Ellis		28800	NE	Rd			Newberg	OR	97132		FALSE	TRUE	FALSE	
John	Ellis		24025	NE	n Rd			Newberg	OR	97132		FALSE	TRUE	FALSE	
Gordon & Sharon	Ellison		29935	NE	amin			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	03/28/2008
Jess & Christy	Emerson		29980	NE	am			Newberg	OR	97132		FALSE	TRUE	FALSE	
John	Estrem		8355	NE	tt			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	
John	Ezell		23645	NE	240			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	03/28/2008
Steve	Fawver		1260	NE	alem			Newberg	OR	97132		FALSE	TRUE	FALSE	
Gretchen	Fehrenbacher		1605	N	son			Portland	OR	97217		FALSE	TRUE	FALSE	
Glenn	Ferris		32678	NE	all			Newberg	OR	97132		FALSE	TRUE	FALSE	
Kyle & Patty	Findley		1001	NE	alem			Newberg	OR	97132	patty.findley@verizon.net	FALSE	TRUE	FALSE	
Jim & Jacquie	Fisher		23225	NE	n Rd			Newberg	OR	97132		FALSE	TRUE	FALSE	
Roland & Goldie	Flock		30150	NE	wood			Newberg	OR	97132		FALSE	TRUE	FALSE	
Lucia	Foster				Box			Newberg	OR	97132		FALSE	TRUE	FALSE	
Alan	Fox		885		rt Rd	SE	P	Salem	OR	97301		FALSE	TRUE	FALSE	
Bruce	Freeman		4312	NE	Dr			Newberg	OR	97132	t	FALSE	TRUE	FALSE	
Berklee	Freeman		29410	NE	onvill			Newberg	OR	97132		FALSE	TRUE	FALSE	
Dan	Fricke		455		rt Rd	SE	B	Salem	OR	97301		FALSE	TRUE	FALSE	
Ken	Friday		525	NE	St			McMinnville	OR	97128		FALSE	TRUE	FALSE	
	Living Trust		PO BOX 1057					Newberg	OR	97132		FALSE	TRUE	TRUE	11/21/2008
Walt	Gaibler		1301	E	n			Newberg	OR	97132		FALSE	TRUE	TRUE	11/13/2009
Peggy	Gainer		19098	NE	240			Newberg	OR	97132		FALSE	TRUE	FALSE	
Mary Ann	Galloway		23990	NE	e			Newberg	OR	97132		FALSE	TRUE	FALSE	
Victor	Gamble		14475	NE	Hill			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	05/28/2008
Gloria	Gardner	Dept of Land Conservation	635		TOL	NE	15	SALEM	OR	25	s	FALSE	TRUE	FALSE	
Jennifer	Gartner		8630	NE	Ridg			Newberg	OR	97132		FALSE	TRUE	FALSE	
Ron & Teresa	Gaylord		10695	NE	e Rd			Newberg	OR	97132		FALSE	TRUE	FALSE	
Matt	Gib		31909		al			Newberg	OR	97132		FALSE	TRUE	FALSE	
William A.	Gille, P.E.	YC Public Works	2060		ette			McMinnville	OR	97128		FALSE	TRUE	TRUE	
Jon	Globig		PO Box 1075					Newberg	OR	97132	globigj@yahoo.com	FALSE	TRUE	FALSE	
John & Rebecca	Goad		23775	NE	ycres			Newberg	OR	97132		FALSE	TRUE	FALSE	
Nadia	Gorder		3501	NE	Dr			Newberg	OR	97132		FALSE	TRUE	FALSE	
Roger	Grahn		23287		lle			Sherwood	OR	97140		FALSE	TRUE	FALSE	
Connie	Gray		8980	NE	Paul			Newberg	OR	97132		FALSE	TRUE	FALSE	
Genelle	Gregg		704		urst			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	
Michael	Gunn		PO BOX 162					Dundee	OR	97115		FALSE	TRUE	TRUE	02/28/2009
Judith	Guy		28925	SW	hollo			Hillsboro	OR	97123		FALSE	TRUE	FALSE	
Everett & Shirley	Hackworth		24015	NE	e			Newberg	OR	97132		FALSE	TRUE	FALSE	
Greg	Haffner		31181	NE	al			Newberg	OR	97132		FALSE	TRUE	FALSE	
Johnna	Haffner		31181	NE	al			Newberg	OR	97132		FALSE	TRUE	FALSE	
Donald & Crystal	Hall		905	W	dan			Newberg	OR	97132		FALSE	TRUE	FALSE	
Bruce	Hall	Willamette Farms of Oregon	8000	NE	sh			Newberg	OR	97132		FALSE	TRUE	FALSE	
Dave	Halsey	Halsey Resources LLC	51		aldi			Oswego	OR	97035		FALSE	TRUE	FALSE	12/07/2007
Ron	Halstead		2301		Ct.			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	04/22/2009
Alan	Halstead		119		ey			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	04/22/2009
James R.	Hanks, PE	JRH	4765		e		e	Eugene	OR	97401		FALSE	TRUE	FALSE	12/07/2007
David	Harle		22230	SW	rs dr			Tualatin	OR	97062		FALSE	TRUE	FALSE	
Doug	Hamar		901	N.	cher		1	Newberg	OR	97132		FALSE	TRUE	FALSE	
Dan & Michelle	Harrington		23300	SW	Peak			Hillsboro	OR	97123		FALSE	TRUE	FALSE	
Erik	Havig, P.E.	Department of Transportation	455		rt Rd	SE	B	Salem	OR	97301		FALSE	TRUE	FALSE	
Jane & Russ	Heater		29321	NE	amin			Newberg	OR	97132		FALSE	TRUE	FALSE	
Chuck	Heath		29465	NE	am			Newberg	OR	97132		FALSE	TRUE	FALSE	
Cristen	Henley		30475	NE	s Ln			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	
Pam	Hermanson		31187	NE	al			Newberg	OR	97132		FALSE	TRUE	FALSE	
John & Margaret	Hickert		16255	SW	Charl			King City	OR	97224		FALSE	TRUE	FALSE	
Don	Hodydon		28570	NE	onvill			Newberg	OR	97132	flyingharvest@yahoo.com	FALSE	TRUE	FALSE	
Don	Holland		24315	NE	240			Newberg	OR	97132	dlholland1@verizon.net	FALSE	TRUE	FALSE	
Charlie & Debbie	Holton		1400	NE	alem			Newberg	OR	97132		FALSE	TRUE	FALSE	
Allan & Carla	Hopp		24200	NE	ns			Newberg	OR	97132		FALSE	TRUE	FALSE	
Pat	Horton		32305	NE	Parre			Newberg	OR	97132		FALSE	TRUE	FALSE	
Gary	Host		29945	NE	amin			Newberg	OR	97132		FALSE	TRUE	FALSE	
Jim & Margaret	Humpres		29440	NE	amin			Newberg	OR	97132		FALSE	TRUE	FALSE	
Robert	Hurford		1105	N	Ave			Newberg	OR	97132		FALSE	TRUE	FALSE	
Garren	Ingram				Box			Sherwood	OR	97140		FALSE	TRUE	FALSE	
Irene & Charles	Jackson		31339	NE	al			Newberg	OR	97132		FALSE	TRUE	FALSE	

Jeffrey	Jackson		281		I Oak			Newberg	OR	97132		FALSE	TRUE	TRUE	02/12/2008
Tammy	Jacobs		23400	NE	240			Newberg	OR	97132		FALSE	TRUE	FALSE	
David	Jensen		14791	NE	d Ct			Newberg	OR	97132		FALSE	TRUE	FALSE	
John	Jensen Jr		8630	NE	Paul			Newberg	OR	97132		FALSE	TRUE	FALSE	
Dennis & Carrie	Jones		13340	NE	el Rd			Newberg	OR	97132		FALSE	TRUE	FALSE	
Hal	Kafka		29550	NE	d Ln			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	08/14/2009
Janice	Kaprowski		13700	NE	Shor			Newberg	OR	97132		FALSE	TRUE	FALSE	
Joe	Keizur		11815	NE	St		0	Vancouver	OR	98682	no such email address	FALSE	TRUE	FALSE	
James & Carolyn	Keller		217		Hwy		36	Newberg	OR	97132		FALSE	TRUE	FALSE	
Ruth	Kilgore		8625	NE	Paul			Newberg	OR	97132		FALSE	TRUE	FALSE	
Dr. R	Kimball		69377		e			Burns	OR	97720		FALSE	TRUE	FALSE	
Dollie	King		9300	NE	sh			Newberg	OR	97132		FALSE	TRUE	FALSE	
Lee	Klampe		1220		St	SE		Salem	OR	97302		FALSE	TRUE	FALSE	
Erika	Kriebel		22812	W.	Drive			West Linn	OR	0261		FALSE	TRUE	TRUE	02/19/2009
Gordon	Kroemer		29950	NE	onvill			Newberg	OR	97132	kroemer2@verizon.net	FALSE	TRUE	FALSE	
Linda	LaHente		3004	NE	Zimri			Newberg	OR	97132		FALSE	TRUE	FALSE	
Brent	Lam		28300	NE	Rd			Newberg	OR	97132	moxiemoney@yahoo.com	FALSE	TRUE	TRUE	02/04/2008
Kim	Lanier		3701		Oak			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	
John	Lawson		500	N	eld			Newberg	OR	97132		FALSE	TRUE	FALSE	
Paul	Lemman		812	W	dan			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	
Dawn	Lenard		608	E	St			Newberg	OR	97132		FALSE	TRUE	FALSE	
Gene	Lile		8240	NE	Ridg			Newberg	OR	97132		FALSE	TRUE	FALSE	
Jaime	Lim		922	N	gswo			Portland	OR	97217		FALSE	TRUE	FALSE	
Erik & Heather	Linvog		10890	NE	e Rd			Newberg	OR	97132		FALSE	TRUE	FALSE	
Bruce	Lovejoy		14650	NE	gbro			Newberg	OR	97132		FALSE	TRUE	FALSE	
Linda	Lowe		23350	N.	way			Newberg	OR	97132		FALSE	TRUE	TRUE	07/23/2008
Mort & Barbara	Lowe		25935	NE	Valle			Newberg	OR	97132		FALSE	TRUE	FALSE	
John & Georgeta	Lucescu		25240	NE	Valle			Newberg	OR	97132		FALSE	TRUE	FALSE	
Krista & Karl	Maerz		11220	NE	g Ln			Newberg	OR	97132		FALSE	TRUE	FALSE	
Craig & Anna	Major		14788	NE	d Ct			Newberg	OR	97132		FALSE	TRUE	FALSE	
Kent	Malaput		23485	NE	n Rd			Newberg	OR	97132		FALSE	TRUE	FALSE	
Jon	Mangis		920		lee	SE		Salem	OR	97306	mangisja@aol.com	FALSE	TRUE	FALSE	
Rowena	Marks		23520	NE	n Rd			Newberg	OR	97132		FALSE	TRUE	FALSE	
Jack	Marontate		12128		y Ln			Newberg	OR	97132		FALSE	TRUE	FALSE	
Allan	Martell		29955	NE	amin			Newberg	OR	97132		FALSE	TRUE	FALSE	
Jay & Bridget	Martin		3870		s St			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	
Mark	Martin		125	S	Rd			Newberg	OR	97132		FALSE	TRUE	FALSE	
Iona	Martinson		8625	NE	Paul			Newberg	OR	97132		FALSE	TRUE	FALSE	
Gary	Mays		29801	NE	am			Newberg	OR	97132	poenan@aol.com	FALSE	TRUE	FALSE	
Cheryl	McCalfrey		7425		wood			Newberg	OR	97132		FALSE	TRUE	FALSE	
Eileen	McCombs				Box			Newberg	OR	97132		FALSE	TRUE	FALSE	
Susan	McDermitt		3301	NE	Dr			Newberg	OR	97132		FALSE	TRUE	FALSE	
Monte & Phyllis	McKane		3000		amin			Newberg	OR	97132		FALSE	TRUE	FALSE	
David	Mehler		402	N	ol			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	
Richard	Meissner		13445	NE	Hollo			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	08/24/2009
Alan & Barbara	Meyer		4000	N	n			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	04/22/2009
Fred & Laurie	Meyer		3701	NE	Dr			Newberg	OR	97132		FALSE	TRUE	FALSE	
Elvin	Mills		14615	NE	gbro			Newberg	OR	97132		FALSE	TRUE	FALSE	
Nancy	Mills		14589	NE	gbro			Newberg	OR	97132		FALSE	TRUE	FALSE	
Galen	Mines		8380	NE	Ridg			Newberg	OR	97132		FALSE	TRUE	FALSE	
Kayda	Mitchell		14875	NE	en			Newberg	OR	97132		FALSE	TRUE	FALSE	
Kelly	Moen				Box			Newberg	OR	97132		FALSE	TRUE	FALSE	
Dave	Monson		8820	NE	Paul			Newberg	OR	97132	davlorn@easystreet.net	FALSE	TRUE	TRUE	02/25/2009
Steve	Morasch		700	N	hingt		701	Vancouver	OR	98660		FALSE	TRUE	FALSE	
Bob & Jane	Mosher		2716	E	rts			Newberg	OR	97132		FALSE	TRUE	FALSE	
Chris	Nash		31655	NE	onvill			Newberg	OR	97132		FALSE	TRUE	FALSE	
Dixie	Nelson		400		e Ln			Newberg	OR	97132		FALSE	TRUE	FALSE	
Karen	Nelson		1220		St	SE		Salem	OR	97302		FALSE	TRUE	FALSE	
Terry & Sharon	Nelson		14125	NE	n Rd			Newberg	OR	97132		FALSE	TRUE	FALSE	
Jeff	Neville		311	N	dian			Newberg	OR	97132		FALSE	TRUE	FALSE	
	Garbage &				Box			Newberg	OR	97132		FALSE	TRUE	FALSE	
Larry	Nibler		15495	NE	ry Rd			Newberg	OR	97132		FALSE	TRUE	FALSE	
Paddy & Teresa	O'Neil		14455	NE	Hill			Newberg	OR	97132		FALSE	TRUE	FALSE	
Derrie	Palmer				Box			Newberg	OR	97132		FALSE	TRUE	FALSE	
Jamie	Parks	Kittleson & Associates, Inc.	610	SW	St	700		Portland	OR	97205	jparks@kittelson.com	FALSE	TRUE	FALSE	
Evelyn	Parlette		23800	NE	Yam			Newberg	OR	97132		FALSE	TRUE	FALSE	
Jimmy & Mary	Parrack		2440	NE	Ln			Newberg	OR	97132		FALSE	TRUE	FALSE	

Elyane & AC	Parson		1955		lake			Newberg	OR	97132		FALSE	TRUE	FALSE		
Dorothy	Pekkola		1735	NW	dows			McMinnville	OR	97128		FALSE	TRUE	FALSE		
Rod	Pelling				Box			Newberg	OR	97132		FALSE	TRUE	FALSE		
Ilsa	Perse		PO Box 1083					McMinnville	OR	97128		FALSE	TRUE	FALSE		
Dave	Petry		29375	NE	am			Newberg	OR	97132		FALSE	TRUE	FALSE		
Mike	Phillips		4104	NE	Dr			Newberg	OR	97132	liates.com	FALSE	TRUE	FALSE		
Brian & Pamela	Pierce		24339	NE	on			Newberg	OR	97132	net	FALSE	TRUE	FALSE		
J D & Edith	Pierce				Box			Dundee	OR	97115		FALSE	TRUE	FALSE		
Patricia	Pleus		23630	NE	ns			Newberg	OR	97132		FALSE	TRUE	FALSE		
Dave & Marion	Pratt		14550	NW	g			Newberg	OR	97132		FALSE	TRUE	FALSE		
Niel	Rader		3312	NE	wood			Newberg	OR	97132		FALSE	TRUE	FALSE		
Roger	Rader		1320	NE	alem			Newberg	OR	97132		FALSE	TRUE	FALSE		
Larry	Renne		10350	NE	e Rd			Newberg	OR	97132		FALSE	TRUE	FALSE		
	Resident		2023	NE	alem			Newberg	OR	97132		FALSE	TRUE	FALSE		
Mischelle	Rierson		110		Inut			Newberg	OR	97132		FALSE	TRUE	FALSE		
Michael	Robinson	Perkins Cole	1120	NW	h St		Fl	Portland	OR	4128	om	FALSE	TRUE	FALSE		
Jim	Ronning		29895	NE	onvill			Newberg	OR	97132		FALSE	TRUE	FALSE		
Bill	Rosacker		29190		song			Newberg	OR	97132		FALSE	TRUE	FALSE		
Bill	Rourke		4016	N	ge St			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE		
Marks	Rowena		23520	NE	ns			Newberg	OR	97132		FALSE	TRUE	FALSE		
Jeanine	Rustad		310	SW	h		0	Portland	OR	97204	no such email address	FALSE	TRUE	TRUE		04/22/2009
Kelley	Rustrum				BOX			Prineville	OR	97754		FALSE	TRUE	TRUE		
Garth	Rylands		23755	NE	n Rd			Newberg	OR	97132		FALSE	TRUE	FALSE		
Karen	Saunders		3850		Drive			Newberg	OR	97132		FALSE	TRUE	FALSE		
Benjamin	Schaad		3320		ngto			Newberg	OR	97128		FALSE	TRUE	FALSE		
Grace	Schaad		31525	NE	ad			Newberg	OR	97132		FALSE	TRUE	FALSE		
Lewis	Schaad		31655	NE	ad			Newberg	OR	97132		FALSE	TRUE	FALSE		
Richard	Schaad		31600	NE	Paret			Newberg	OR	97132		FALSE	TRUE	FALSE		
S	Schaad				Box			Tigard	OR	97281		FALSE	TRUE	FALSE		
Thomas K	Schaad		610	SW	Dr			Dundee	OR	97115		FALSE	TRUE	FALSE		
Herb & Kim	Schaffner		32400	NE	Paret			Newberg	OR	97132		FALSE	TRUE	FALSE		
Joe	Schiewe	The Saunders CO.	3850	N	Dr.			Newberg	OR	97132		FALSE	TRUE	FALSE		
John & Sandy	Schmidt		29600	NE	d Ln			Newberg	OR	97132		FALSE	TRUE	FALSE		
Eric	Schoenborn				Box			Amity	OR	97101		FALSE	TRUE	TRUE		02/12/2008
Rhonda & Richard	Senz		27100	NE	Rd			Newberg	OR	97132		FALSE	TRUE	FALSE		
Lane	Shetterly		189	SW	emy			Dallas	OR	97338	lane@siso-law.com	FALSE	TRUE	FALSE		
Gary & Sandra	Shuler		30790	NE	wood			Newberg	OR	97132		FALSE	TRUE	FALSE		
James & Vickie	Smith		23995	NE	n Rd			Newberg	OR	97132	jimvic37@hotmail.com	FALSE	TRUE	FALSE		
Ranee	Smith	Barnes Elementary School	32300	NE	Parre			Newberg	OR	97132	12.or.us	FALSE	TRUE	FALSE		
Don	Smith		13510	NE	el Rd			Newberg	OR	97132		FALSE	TRUE	FALSE		
Dorothy C.	Smith		13510	NE	el Rd			Newberg	OR	97132		FALSE	TRUE	FALSE		
Peter	Snow		28815	NE	onvill			Newberg	OR	97132		FALSE	TRUE	FALSE		
Arlene	Snyder		29505	NE	amin			Newberg	OR	97132		FALSE	TRUE	FALSE		
Robert	Soppe		709	E	dan			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE		08/14/2009
Karen	Spear		3320		ngto			Newberg	OR	97132		FALSE	TRUE	FALSE		
David	Sprechy		PO BOX 1085					Newberg	OR	97132		FALSE	TRUE	TRUE		11/13/2009
Thomas	Steinman		P.O. Box 312					Newberg	OR	97132		FALSE	TRUE	FALSE		12/13/2007
Gerald & Jadene	Stensland		901	N	cher		169	Newberg	OR	97132		FALSE	TRUE	FALSE		
Bev	Stepp		PO Box 3174					Newberg	OR	97132		FALSE	TRUE	TRUE		07/23/2008
Mart	Storm		22965	NE	ycres			Newberg	OR	97132		FALSE	TRUE	FALSE		
Gene	Strohman		32775		Parre			Newberg	OR	97132		FALSE	TRUE	FALSE		
Tanya	Strub		1107	S	alem			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE		07/18/2008
Frances	Svendsen		30170	NE	amin			Newberg	OR	97132		FALSE	TRUE	FALSE		
Bill & Deb	Swandson		29770	NE	onvill			Newberg	OR	97132		FALSE	TRUE	FALSE		
Darlene	Swonger		2605		alem			Newberg	OR	97132		FALSE	TRUE	FALSE		
Stanton & Lori	Symank		1008	W	dan			Newberg	OR	97132		FALSE	TRUE	FALSE		
Maryann	Tack		1400		Villa			Newberg	OR	97132		FALSE	TRUE	FALSE		
Richard	Taeubel		16780	NE	h Rd			Newberg	OR	97132		FALSE	TRUE	FALSE		
Rick& Jeane	Talbott		14250	NE	n Rd			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE		
Keith & Babetta	Taylor		29195	NE	amin			Newberg	OR	97132		FALSE	TRUE	FALSE		
Russ	Thomas		1808		Ln			Newberg	OR	97132		FALSE	TRUE	FALSE		
Milton	Thompson		29275	NE	am			Newberg	OR	97132		FALSE	TRUE	FALSE		
Steve & Mary	Thure		3512	N	n			Newberg	OR	97132		FALSE	TRUE	FALSE		
Zdenka	Trnkova				Box			Newberg	OR	97132		FALSE	TRUE	FALSE		
Scott	Tucker		1205	NE	Jr			Portland	OR	97229		FALSE	TRUE	FALSE		
Tommy	Tucker		3304	N	n			Newberg	OR	97132		FALSE	TRUE	FALSE		
Steve	Ulman	and Development	635		ol St	NE	150	Salem	OR	2540	no such email address	FALSE	TRUE	TRUE		04/22/2009

Robin	Vachter		24285	NE	Ln			Newberg	OR	97132		FALSE	TRUE	FALSE	
Roy & Gloria	Van Houlen		12465		y Ln			Newberg	OR	97132		FALSE	TRUE	FALSE	
John	Velez		17685	NE	der			Sherwood	OR	97140		FALSE	TRUE	FALSE	
Joyce	Vergets		1301		n St.		250	Newberg	OR	97132		FALSE	TRUE	TRUE	07/23/2008
Barbara	Vetter		1220		St	SE		Salem	OR	97302		FALSE	TRUE	FALSE	
Ryan	Vetter		1220		St	SE		Salem	OR	97302		FALSE	TRUE	FALSE	
Chris	Voigt		PO BOX 788					Carlton	OR	0700	no such email address	FALSE	TRUE	TRUE	08/01/2008
Hayli & Dave	Walker				Box			Newberg	OR	97132		FALSE	TRUE	FALSE	
Craig & Elizabeth	Wasson		24077	NE	ycres			Newberg	OR	97132		FALSE	TRUE	FALSE	
Shirley & Dick	Wayne		24200	NE	Ln			Newberg	OR	97132		FALSE	TRUE	FALSE	
Donald & Joyce	Weeks		23805	NE	ycres			Newberg	OR	97132		FALSE	TRUE	FALSE	
Kenneth M.	Wegter		3872		shain			Salem	OR	97305	operate1ae@yahoo.com	FALSE	TRUE	TRUE	08/29/2008
Duane	Wells		30350	N	99W			Newberg	OR	97132		FALSE	TRUE	FALSE	
Patricia	Werth		33180	NE	en			Newberg	OR	97132		FALSE	TRUE	FALSE	
Dean	Werth		33180	NE	en			Newberg	OR	97132	dew@gofreewire.com	FALSE	TRUE	FALSE	
Dana	White	Providence Health System	4706	NE	n			Portland	OR	97213		FALSE	TRUE	FALSE	
Trina	Whitman		5415	SW	gate		100	Portland	OR	97221		FALSE	TRUE	FALSE	
Michael	Willcuts				Box			Newberg	OR	97132	no such email address	FALSE	TRUE	TRUE	12/27/2007
Blake	Williams		4500	NE	Hero			Newberg	OR	97132		FALSE	TRUE	FALSE	
Gary & Rosanna	Wong		29235	NE	am			Newberg	OR	97132		FALSE	TRUE	FALSE	
John	Wyland	J.T. Smith Company	4386	SW	dem		305	Portland	OR	97239		FALSE	TRUE	FALSE	11/21/2008
Naomi	Zwerdling	ODOT	455		rt Rd		B	Salem	OR			FALSE	TRUE	FALSE	

NEWS OF NEWBERGS FUTURE
Newletter - January 2010

First Name	Last Name	Business Name	Street #	Dir Prefix	eet Na	Dir Suffix	Bldg	City	State	Zip Code	Email	Prefer Email?	Prefer Mail?	Mail Returned	ddress U	Removal from Ma
Donnald	Alexander		1112	N	ek Ln			Newberg	OR	97132	on.net	TRUE	FALSE	FALSE		
Norma	Alley	City Council						Newberg	OR	97132	or.us	TRUE	FALSE	FALSE		
Erik	Andersson		255		merci	NE		Salem	OR	97301	.us	TRUE	FALSE	FALSE		
Bob	Andrews	City Council	1103	N	Ave			Newberg	OR	97132	g.or.us	TRUE	FALSE	FALSE	08	
Terry	Atzen		29365	NE	am			Newberg	OR	97132	terry@haironfirenow.com	TRUE	FALSE	FALSE		
Denise	Bacon	City Council						Newberg	OR	97132	g.or.us	TRUE	FALSE	FALSE	09	
Tom	Bailey		12410		y Ln			Newberg	OR	97132	reno78@verizon.net	TRUE	FALSE	FALSE		
Chris	Baird		No such number								works9911@hotmail.com	TRUE	FALSE	FALSE		
Thomas	Barnes	Planning Commission						Newberg	OR	97132	my.mil	TRUE	FALSE	FALSE		
Bruce & Bobbie	Barnett		4600	NE	Hero			Newberg	OR	97132	.net	TRUE	FALSE	FALSE		
Patti	Bartlett		14480	NE	Hill			Newberg	OR	97132	om	TRUE	FALSE	FALSE		
Jim & Susan	Bascom		816	W	dan			Newberg	OR	97132	isbascom@comcast.net	TRUE	FALSE	FALSE		
Brooks	Bateman							Newberg	OR	97132	berg.or.us	TRUE	FALSE	FALSE		
David	Beam								OR		or.us	TRUE	FALSE	FALSE		
Al	Benkendorf		2701	NW	hn		461	Portland	OR	97210	apb@benkassoc.com	TRUE	FALSE	FALSE		
Jim	Bentley		29680	NE	d Ln			Newberg	OR	97132	jimb33@comcast.net	TRUE	FALSE	FALSE		
Gregg	Blume		401		e Ln			Newberg	OR	97132	greggblume@msn.com	TRUE	FALSE	FALSE		
Mike	Boyes	City Council	1109	S	Rd			Newberg	OR	97132	or.us	TRUE	FALSE	FALSE	08	
Steve	Bradford								OR		com	TRUE	FALSE	FALSE		
Steve	Bradford								OR		ssjibradford@msn.com	TRUE	FALSE	FALSE		
John	Bridges	Palmer	515	E	St			Newberg	OR	97132	john@newberglaw.com	TRUE	FALSE	FALSE		
Barton	Brierley							Newberg	OR	97132	rg.or.us	TRUE	FALSE	FALSE		
Craig	Brown	Matrix Dev./Legend Homes	12755	SW	Ave.		e	Portland	OR	97223	om	TRUE	FALSE	FALSE		
Bill	Burton	GVA Kidder Mathews	1	SW	mbia		e	Portland	OR	97258	bburton@gvakm.com	TRUE	FALSE	FALSE	07	
Marc	Butorac		610	SW	ST		e	Portland	OR	97205	mbutorac@kittelson.com	TRUE	FALSE	FALSE	08	
Violet	Caffal-McNeil								OR		vjmcneil@msn.com	TRUE	FALSE	FALSE		
Jessica	Cain	Gunn Cain & Kinney LLP	700		rah		250	Newberg	OR	97132	cain@GCKattorneys.com	TRUE	FALSE	FALSE	08	
Arthur	Catlett		29585	NE	Ln			Newberg	OR	97132	acatlett@hevanet.com	TRUE	FALSE	FALSE		
Chuck	Chimento		20980	SW	Rd			Sherwood	OR	97140	chimento@sterlink.net	TRUE	FALSE	FALSE		
Tim	Clay		10100	NE	Rd			Newberg	OR	97132	tim.clay@serveron.com	TRUE	FALSE	FALSE		
Jan & Richard	Clay		31850	NE	dd			Newberg	OR	97132	janicerclay@msn.com	TRUE	FALSE	FALSE		
Don	Clements		125	S	Rd			Newberg	OR	97132	rg	TRUE	FALSE	FALSE		
Neil	Cohen				Box			Dundee	OR	97115	neroco2@comcast.net	TRUE	FALSE	FALSE		
Terry	Cole		455		rt Rd	SE		Salem	OR	97301	.us	TRUE	FALSE	FALSE		
Gregg & Liz	Colwell		13500	NE	ease			Newberg	OR	97132	gcolwell@pacifier.com	TRUE	FALSE	FALSE		
Roger	Currier	City Council							OR		rcurrier@hevanet.com	TRUE	FALSE	FALSE	08	
Dave	Dailey		No such address	NE	am			Newberg	OR	97132	drexdave@yahoo.com	TRUE	FALSE	TRUE	08	
Sally	Dallas							Newberg	OR	97132	sally@newbergallery.com	TRUE	FALSE	FALSE		
Sally	Dallas		115	N	ge St			Newberg	OR	97132	sally@newbergallery.com	TRUE	FALSE	FALSE		
Dan	Danicic	City Council						Newberg	OR	97132	or.us	TRUE	FALSE	FALSE		
Brown	Dean		PO Box 3279					Newberg	OR	97132	com	TRUE	FALSE	FALSE		
Charles	DeVoc		3231		nia			Newberg	OR	97132	chinachas@comcast.net	TRUE	FALSE	FALSE		
David & Linda	Dobbins		29830	NE	amin			Newberg	OR	97132	lindob44@yahoo.com	TRUE	FALSE	FALSE		
Mimi	Doukas	WRG Design	5415	SW	gate		100	Portland	OR	97221	mad@wrgd.com	TRUE	FALSE	FALSE		
Derek	Duff	Planning Commission						Newberg	OR	97132	deduf@vestas.com	TRUE	FALSE	FALSE		
Tyler	Ellenson		3215	S.	ooski			Newberg	OR	97132	m	TRUE	FALSE	FALSE		
Sam	Farmer		1201	E	n		6	Newberg	OR	97132	sfarmer@georgefox.edu	TRUE	FALSE	FALSE		
Patricia	Farrell							Newberg	OR		ninebark@juno.com	TRUE	FALSE	FALSE		
Rob	Felton		321		St			Newberg	OR	97132	rfelton@georgefox.edu	TRUE	FALSE	FALSE		
Diane	Ferranti		3816		ia			Newberg	OR	97132	divon62@aol.com	TRUE	FALSE	FALSE		
Joe & Betsy	Fettig		PO Box 546					Newberg	OR	97132	f.betsy@comcast.net	TRUE	FALSE	FALSE		
Kevin	Fish		3841		s St			Newberg	OR	97132	kevinf@nwesi.com	TRUE	FALSE	FALSE		
Carrie & Allen	Fleming		11205	NE	ys Ln			Newberg	OR	97132	carriesue2@verizon.net	TRUE	FALSE	FALSE		
Mary	Foster				Box			Newberg	OR	97132	drensclinic.com	TRUE	FALSE	FALSE		
Debbie & Gene	Fournier		3856		Ct			Newberg	OR	97132	cooksterf@juno.com	TRUE	FALSE	FALSE		
Joni	Fouts		23439	N	99W			Newberg	OR	97132	jfouts@verizon.net	TRUE	FALSE	FALSE		

Tom	Fox		745		merci	NE		Salem	OR	97301	tom.j.fox@state.or.us	TRUE	FALSE	FALSE		
Sid	Friedman	1000 Friends of Oregon	189		ty St	NE	A	Salem	OR	97301	sid@friends.org	TRUE	FALSE	FALSE		
Jubal	Frost		901	N	cher		1	Newberg	OR	97132	jubalfrost@q.com	TRUE	FALSE	FALSE		
Chet & Pam	Fryjoff		29501	NE	Ln			Newberg	OR	97132	fryjoff@comcast.net	TRUE	FALSE	FALSE		
Julie	Fugate		14500	NE	ard			Newberg	OR	97132	juliefugate@kw.com	TRUE	FALSE	FALSE		
Dennis	Gaibler		9680		Rd			Wilsonville	OR	97070	dgaibler@comcast.net	TRUE	FALSE	FALSE	09	
Kathy	George		535	E	St			McMinnville	OR	97128	s	TRUE	FALSE	FALSE		
Lisa	Gohman							Newberg	OR	97132	lgohman@theiatech.com	TRUE	FALSE	FALSE		
Mike	Gougler		4729		ers			Newberg	OR	97132	ggoug@comcast.net	TRUE	FALSE	FALSE		
Rene	Gronli								OR		il.com	TRUE	FALSE	FALSE		
Alan	Halstead							Newberg	OR	97132	hlstdalp@yahoo.com	TRUE	FALSE	FALSE		
Jon & Darlene	Hannah		918		yfield			Henderson	NV	89015	dartvl@aol.com	TRUE	FALSE	FALSE		
Marvin	Hanson								OR		scout45-70@comcast.net	TRUE	FALSE	FALSE		
Charles	Harrell	Gunn Cain & Kinney LLP	700		rah		250	Newberg	OR	97132	m	TRUE	FALSE	FALSE	08	
Matson	Haug							Newberg	OR	97132	m	TRUE	FALSE	FALSE		
Matson	Haug		1524		Cree			Newberg	OR	97132	m	TRUE	FALSE	FALSE		
Sonja	Haugen				Box			Newberg	OR	97132	com	TRUE	FALSE	FALSE		
Shelly	Holly		700	NE	oma		0	Portland	OR	97232	sholly@parametrix.com	TRUE	FALSE	FALSE		
Jon	Holt		3723		s St			Newberg	OR	97132	jonholt@verizon.net	TRUE	FALSE	FALSE		
Barry & Kris	Horn		610	E	dan			Newberg	OR	97132	bear503@pacifier.com	TRUE	FALSE	FALSE		
Sally	Howes		812	NE	dan			Newberg	OR	97132	trashly.manor@gte.net	TRUE	FALSE	FALSE		
Joe	Hughes		31205	NE	ad			Newberg	OR	97132	om	TRUE	FALSE	FALSE		
Fran & Dave	Hunter		30050	NE	amin			Newberg	OR	97132	vegas64@comcast.net	TRUE	FALSE	FALSE		
Saj	Jivanjee		32230	NE	Parre			Newberg	OR	97132	saj@jcaoregon.com	TRUE	FALSE	FALSE		
Carrie	Jones		13340	NE	el Rd			Newberg	OR	97132	m	TRUE	FALSE	FALSE		
Ralph	Jumago								OR		rjumago@msn.com	TRUE	FALSE	FALSE		
Cecily	Kelly								OR		cecilyk@aol.com	TRUE	FALSE	FALSE		
Sheryl	Kelsh								OR		rg	TRUE	FALSE	FALSE		
Brian & Beth	Keyser		1400		ins			Newberg	OR	97132	t	TRUE	FALSE	FALSE		
Bob & Kathy	Knowles		29655	NE	amin			Newberg	OR	97132	robkath@msn.com	TRUE	FALSE	FALSE		
Ron	Knox		31152	NE	al			Newberg	OR	97132	filbertfarm@verizon.net	TRUE	FALSE	FALSE		
Gregg	Koskela		1225	NE	alem			Newberg	OR	97132	gkoskela@gmail.com	TRUE	FALSE	FALSE		
Mike	Lambert								OR		mlamb@onlinemac.com	TRUE	FALSE	TRUE	08	
Kathy	Lambert		5501	NE	n			McMinnville	OR	97128	mlamb@onlinemac.com	TRUE	FALSE	TRUE	08	
Joe	Landes		1213	NE	alem			Newberg	OR	97132	landesjoe@yahoo.com	TRUE	FALSE	FALSE		
Matt	Larabie								OR		office@resginc.com	TRUE	FALSE	FALSE		
Bob	Larson	City Council	2902	E	St		27	Newberg	OR	97132	r.us	TRUE	FALSE	FALSE	08	
Leslie	Lewis							Newberg	OR	97132	Lewisl@co.yamhill.or.us	TRUE	FALSE	FALSE		
Dennis	Lewis		29530	NE	Ln			Newberg	OR	97132	dennis@lewisav.com	TRUE	FALSE	FALSE		
Leslie	Lewis		535	E	St			McMinnville	OR	97128	lewisl@co.yamhill.or.us	TRUE	FALSE	FALSE		
Jaime	Lim		4904	E	and			Newberg	OR	97132	jaimelim@juno.com	TRUE	FALSE	FALSE		
Paul	Long		29380	NE	Ln			Newberg	OR	97132	paul.long@comcast.net	TRUE	FALSE	FALSE		
Bruce	Longstroth		2033	NE	alem			Newberg	OR	97132	com	TRUE	FALSE	FALSE		
Don	Loving		29265	NE	amin			Newberg	OR	97132	oresports@aol.com	TRUE	FALSE	FALSE		
John & Priscilla	Lowery		30100	NE	amin			Newberg	OR	97132	jpcilla@verizon.net	TRUE	FALSE	FALSE		
Erin	Maerz		11220	NE	g Ln			Newberg	OR	97132	erinwou@hotmail.com	TRUE	FALSE	FALSE		
Terry	Mahr	City Council						Newberg	OR	97132	r.us	TRUE	FALSE	FALSE		
Craig	Markham		22245	NE	n			Dundee	OR	97115	markhamcp@verizon.net	TRUE	FALSE	FALSE		
Gary	Martin		22956	NW	er			Yamhill	OR	97148	t	TRUE	FALSE	FALSE		
Deborah J	Matthew		24215	NE	Ln			Newberg	OR	97132	n.net	TRUE	FALSE	FALSE		
Keith & Valerie	Maxell		23755	NE	n Rd			Newberg	OR	97132	knvmaxwell@msn.com	TRUE	FALSE	FALSE		
Tami & Stacy	McClellan		14740	NE	d Ct			Newberg	OR	97132	com	TRUE	FALSE	FALSE		
Charles & Ellen	McClure		30295		99W			Newberg	OR	97132	chuck@nutfarm.com	TRUE	FALSE	FALSE		
Stephen	McKinney	City Council						Newberg	OR	97132	wberg.or.us	TRUE	FALSE	FALSE	09	
Marcia	Mikesh		301		hurst			Newberg	OR	97132	architect.com	TRUE	FALSE	FALSE		
Mary Martin	Miller	Keller Williams Realty	9200	SE	ybro		450	Newberg	OR	97132	om	TRUE	FALSE	FALSE		
Gary	Murdoch		23950	NE	n Rd			Newberg	OR	97132	restj9W@verizon.net	TRUE	FALSE	FALSE		

Keith	Nakayama		5390	SE	n Dr		Portland	OR	97267	primeprop@comcast.net	TRUE	FALSE	FALSE	
Akira	Nishioka						Newberg	OR	97132	aynishioka_2@msn.com	TRUE	FALSE	FALSE	07
David	Noren				Box		Hillsboro	OR	97123	net	TRUE	FALSE	FALSE	
Mike	Norkitis		3221	N	St		Newberg	OR	97132	mnorkitis@hotmail.com	TRUE	FALSE	FALSE	
Jessica	Nunley	City of Newberg						OR		rg.or.us	TRUE	FALSE	TRUE	
Joe & Jamie	Ohalloran		14495	NE	n Rd		Newberg	OR	97132	johallo360@aol.com	TRUE	FALSE	FALSE	
Steve	Olson	City of Newberg						OR		or.us	TRUE	FALSE	FALSE	
John	O'Neil						Newberg	OR	97132	om	TRUE	FALSE	FALSE	08
Seth	Otto		5415	SW	gate	100	Portland	OR	97221	m	TRUE	FALSE	FALSE	
Steve	Oulman	Dept. of Land Conservatio	635	NE	ol St.	e	Salem	OR	97301	s	TRUE	FALSE	FALSE	08
John	Owen		PO Box 43				Dundee	OR	97115	jowen@equitygroup.com	TRUE	FALSE	FALSE	
Warren	Parrish						Newberg	OR	97132	wmparrish1@verizon.net	TRUE	FALSE	FALSE	
Warren	Parrish		30450	NE	onvill		Newberg	OR	97132	wmparrish1@verizon.net	TRUE	FALSE	FALSE	08
Luke	Pelz							OR		us	TRUE	FALSE	FALSE	
Geoffrey	Pement							OR		com	TRUE	FALSE	FALSE	
Ronald	Pepin		5456		wick		Anaheim		92807	ronginpep@sbcglobal.net	TRUE	FALSE	FALSE	
Alan	Peterson		32500	NE	al		Newberg	OR	97132	alan@alanpeterson.net	TRUE	FALSE	FALSE	
Harry	Peterson		31180	NE	as		Newberg	OR	97132	.com	TRUE	FALSE	FALSE	
Betty & Steve	Philes		1205	NE	alem		Newberg	OR	97132	sbphiles@aol.com	TRUE	FALSE	FALSE	
Janice & Dennis	Pierce		30690	NE	wood		Newberg	OR	97132	janmpierce@aol.com	TRUE	FALSE	FALSE	
Gene	Piros		2700		orth	38	Newberg	OR	97132	ghpiros@msn.com	TRUE	FALSE	FALSE	
Mike	Proctor		20540	NW	Hollo		Portland	OR	97229	et	TRUE	FALSE	FALSE	
Dr. Paula	Radich	Newberg School District 29J	714	E	St		Newberg	OR	97132	us	TRUE	FALSE	FALSE	
Gerrick	Ransky						Newberg	OR	97132	gkransky@gmail.com	TRUE	FALSE	FALSE	
Jack	Reardon		3896		Mea		Newberg	OR	97132	j.reardon8@comcast.net	TRUE	FALSE	FALSE	
Merilyn	Reeves							OR		merilynreeves@aol.com	TRUE	FALSE	FALSE	
TeAnna	Rice	Planning Commission					Newberg	OR	97132	.com	TRUE	FALSE	FALSE	
Dannie & Teri	Rich		11960	NE	y Ln		Newberg	OR	97132	roken89@aol.com	TRUE	FALSE	FALSE	
Bart	Rierson	City Council						OR		or.us	TRUE	FALSE	FALSE	07
Hadley	Robbins		7090	SW	am		Portland	OR		robbins4152@msn.com	TRUE	FALSE	FALSE	
Jeff	Roberts		1800	NW	h Pl	150	Beaverton	OR	97006	jeff@crandallgroup.com	TRUE	FALSE	FALSE	
Rick	Rogers				Box		Newberg	OR	97132	rlrckrogers@comcast.net	TRUE	FALSE	FALSE	
Rob & Dorothy	Roholt		31150	NE	ad		Newberg	OR	97132	rroholt@verizon.net	TRUE	FALSE	FALSE	
Leonard	Rydell		601		hurst		Newberg	OR	97132	larydell@teleport.com	TRUE	FALSE	FALSE	
Steve	Rymer							OR		leathers@teleport.com	TRUE	FALSE	FALSE	
Todd	Saunders				Box		Dundee	OR	97115	com	TRUE	FALSE	FALSE	
Jim	Schaubel						Newberg	OR	97132	net	TRUE	FALSE	FALSE	
Dennis	Scheuermann		281		e		Newberg	OR	97132	kelsey_2000@msn.com	TRUE	FALSE	FALSE	
Gregg	Schlolz		31139	NE	al		Newberg	OR	97132	gscholz@rweng.com	TRUE	FALSE	TRUE	08
Dave	Scott		24625	NE	ming		Newberg	OR	97132	scottfam777@verizon.net	TRUE	FALSE	FALSE	
Doug	Seeber				Box		Newberg	OR	97132	seek1973@aol.com	TRUE	FALSE	FALSE	
Marc	Shelton	City Council					Newberg	OR	97132	g.or.us	TRUE	FALSE	FALSE	
Vicki	Shepherd		30230	NE	amin		Newberg	OR	97132	dvshepherd@verizon.net	TRUE	FALSE	FALSE	08
Corinne	Sherton		247		merci	e	Salem	OR	97301	sherton@teleport.com	TRUE	FALSE	FALSE	
Michael	Sherwood						Newberg	OR	97132	n.net	TRUE	FALSE	FALSE	
Michael	Sherwood		535	E	St		McMinnville	OR	97128	n.net	TRUE	FALSE	FALSE	
Kimberly	Shute						Newberg	OR	97132	kshute@johnlscott.com	TRUE	FALSE	FALSE	
Scott	Simmons		2712	E.	nd		Newberg	OR	97132	ssimmons@cpm1.com	TRUE	FALSE	FALSE	
Bryan	Skits							OR		com	TRUE	FALSE	FALSE	
Kelly	Sluman							OR		k.sluman@comcast.net	TRUE	FALSE	FALSE	
Philip	Smith	Planning Commission					Newberg	OR	97132	psmith@georgefox.edu	TRUE	FALSE	FALSE	
Phil	Smith		2016		i Dr		Newberg	OR	97132	psmith@georgefox.edu	TRUE	FALSE	FALSE	
Dotti & Steve	Smits		30175	NE	s Ln		Newberg	OR	97132	hadyour5@yahoo.com	TRUE	FALSE	FALSE	
Jim	Snell		17863	SW	dhav		Sherwood	OR	97140	jim@jimsnell.com	TRUE	FALSE	FALSE	
Mike	Soderquist		PO Box 282				Newberg	OR	97132	sod2@verizon.net	TRUE	FALSE	FALSE	
Craig & Julianna	Sowash		3190	NE	al		Newberg	OR	97132	sowashj@oemba.org	TRUE	FALSE	FALSE	
Bette	Spada		28300	NE	onvill		Newberg	OR	97132	hyperuhaul@msn.com	TRUE	FALSE	FALSE	

Phil	Spessard		1600	NE	alem		Newberg	OR	97132	RA5Vigilante@msn.com	TRUE	FALSE	FALSE	
Scott	Steckley		no such address		and	B	Newberg	OR	97132	steckleys@calledi.nt	TRUE	FALSE	TRUE	09
Mary	Stern		535	NE	St		McMinnville	OR	97128	sternm@co.yamhill.or.us	TRUE	FALSE	FALSE	
Truman A.	Stone	Palmer PC	515	East	St.		Newberg	OR	97132	m	TRUE	FALSE	FALSE	08
Elaine	Streed				Box		Newberg	OR	97132	scubai@earthlink.net	TRUE	FALSE	FALSE	08
Mike & Cathy	Stuhr	Planning Commission	31100	NE	wood		Newberg	OR	97132	Mcstuhr@verizon.net	TRUE	FALSE	FALSE	
Mike	Sturdevant							OR		trimountain@comcast.net	TRUE	FALSE	FALSE	
Robert & Rebecca	Summers		23910	NE	e		Newberg	OR	97132	besnwecky@hotmail.com	TRUE	FALSE	FALSE	
Elaine	Taylor	Retired						OR		eartaylor@yahoo.com	TRUE	FALSE	FALSE	09
Kathi	Thelander		212	W	St		Newberg	OR	97132	katnnetti@aol.com	TRUE	FALSE	FALSE	
Gary & Pamela	Thomas				Box		Newberg	OR	97132	t	TRUE	FALSE	FALSE	
Richard & Nancy	Thomas		24000	NE	n Rd		Newberg	OR	97132	njthomas2@aol.com	TRUE	FALSE	FALSE	
Ron	Thomason							OR		thomason@integrity.com	TRUE	FALSE	FALSE	
Milt & Sally	Thompson		29275	NE	am		Newberg	OR	97132	mgtsat@juno.com	TRUE	FALSE	FALSE	
Mike	Torgeson		8315	NE	Ridg		Newberg	OR	97132	torgeson_5@msn.com	TRUE	FALSE	FALSE	
Nick	Tri	Planning Commission					Newberg	OR	97132	trik8@verizon.net	TRUE	FALSE	FALSE	
John	Trudel	Assoc	4303	NE	aven		Newberg	OR	97132	jtrudel@trudelgroup.com	TRUE	FALSE	FALSE	08
Erika	Unknown							OR		om	TRUE	FALSE	FALSE	
Valery	Van Gundy		24495	NE	240		Newberg	OR	97132	nwrider@teleport.com	TRUE	FALSE	FALSE	
Brett	Veatch				Box		Newberg	OR	97132	coppergoldinc@msn.com	TRUE	FALSE	FALSE	
Tony	Visuano				Box		Willamina	OR	97396	tonyv@prurep.com	TRUE	FALSE	FALSE	
Curt	Walker		901		cher	201	Newberg	OR	97132	cdw_901@yahoo.com	TRUE	FALSE	TRUE	09
Lon	Wall	Planning Commission	625	N	on St		Newberg	OR	97132	und.com	TRUE	FALSE	TRUE	08
Delmar & Darlene	Washburn		10820	NE	enso		Newberg	OR	97132	mail@theomatics.com	TRUE	FALSE	FALSE	
	Trust		10820	NE	enso		Newberg	OR	97132	mail@theomatics.com	TRUE	FALSE	FALSE	
David & Corrine	Waterbury		32695	NE	Parre		Newberg	OR	97132	s.com	TRUE	FALSE	FALSE	08
Pamela	Weaver		PO Box 764				Newberg	OR	97132	nce.org	TRUE	FALSE	FALSE	08
Tom	Weber		12755	SW	Ave	0	Portland	OR	97223	tom@terra-weber.com	TRUE	FALSE	FALSE	
Matt	Wellner	Wellner Residential	17933	NW	gree	300	Beaverton	OR	97006	roup.com	TRUE	FALSE	FALSE	08
Raymond & Lynn	Weygandt	Meeting Center	809	W	St		Newberg	OR	97132	m	TRUE	FALSE	FALSE	
Greg	Winterowd		310	SW	Ave	0	Portland	OR	97204	g.com	TRUE	FALSE	FALSE	
Wade	Witherspoon	City Council					Newberg	OR	97132	ademy.com	TRUE	FALSE	FALSE	
Eugene	Wolf		30003	SW	Dr		Wilsonville	OR	97132	gene@wolfnw.com	TRUE	FALSE	FALSE	
Ron	Woodard		5995	SW	ar		McMinnville	OR	97128	l.com	TRUE	FALSE	FALSE	
Marvin & Ellie	Wycliff		2505	NE	alem		Newberg	OR	97132	elliew@teleport.com	TRUE	FALSE	FALSE	
Joni	Zimmerman		11101	W	dan		Newberg	OR	97132	joni@frenetic.com	TRUE	FALSE	FALSE	

City of Newberg

Volume 5, Issue 1

January 15, 2010

News of Newberg's Future

INSIDE THIS ISSUE:

Affordable Housing Update 2

Animal Shelter Update 2

FEMA Floodplain Study & Map Update 3

Census New Construction Program 3

Downtown Signs Update 4

Planning Division Info 4

For more information about the Economic Opportunities Analysis, contact Jessica Nunley at 503-554-7744

Planning for Newberg's Economic Future

How many people will live in Newberg in 2030? Projections show that our population will be approximately 42,870 in 20 years. Where will people live and work? These are the questions that the City tries to answer and be prepared for. Future planning for the City considers how many people we should expect to live in Newberg over the next 20-30 years, and how we will be able to provide adequate jobs and land for those people. One thing we hear often from citizens is that they want Newberg to be a "live here, work here, shop here" kind of place - in other words, a complete community. We strive to implement those principles in our future planning for the city.

Newberg has a document called the Economic Opportunities Analysis that has population and employment projections, demographic information for city residents, and buildable lands inventories for commercial and industrial land. We are currently in the process of updating the Economic Opportunities Analysis with more current data. Having the Economic Opportunities Analysis updated from time to time with the best available data helps decision makers make more informed decisions about land use and helps the City stay in compliance with State law.

Summary of Changes to the Economic Opportunities Analysis (EOA):

- Updated population, demographic, economic and employment statistics.
- An economic trends analysis section that looks at national, state and regional trends, regional economic development industry clusters and target industries, Yamhill County agribusiness, and regional industrial land availability.
- A new section that covers an assessment of our community economic development potential. This section includes updated employment projections, a discussion of Newberg's comparative advantages and disadvantages relative to similar regional markets, and Newberg's special opportunities to capitalize on its unique geographic niche in the regional marketplace.
- A more robust discussion of Newberg's economic development strategy. The current EOA focuses largely on regional targeted industry clusters; the revised version of the EOA focuses more on our local targeted industry clusters as the foundation of our economic development efforts. This section also includes actions to capitalize on Newberg's comparative advantages and to address the comparative disadvantages, and actions to implement the overall economic development strategy.
- Updated buildable land inventories and the addition of maps that illustrate the available industrial and commercial buildable land by area.

The City Council will consider the revised EOA at their February 1, 2010 meeting. The Council meeting will be held at the Newberg Public Safety Building, 401 E Third Street, at 7 p.m.

For more information, see the City's website at:
http://www.newbergoregon.gov/economicdevelopment/draft-revised-economic-opportunities-analysis-january-2010

Affordable Housing Update

For more information about the Affordable Housing Action Plan, contact David Beam at 503-537-1213

The Affordable Housing Action Committee has been formed and is now meeting to develop some recommended implementation measures for the tasks laid out in Newberg's Affordable Housing Action Plan. As with the committee that created the Action Plan, members of the Action Committee were appointed by Mayor Andrews and consist of representatives of a broad range of interests in affordable housing within the community. Committee members have been assigned to subcommittees to develop some task implementation ideas that will be considered by the full Committee. The subcommittees will address the following affordable housing issues:

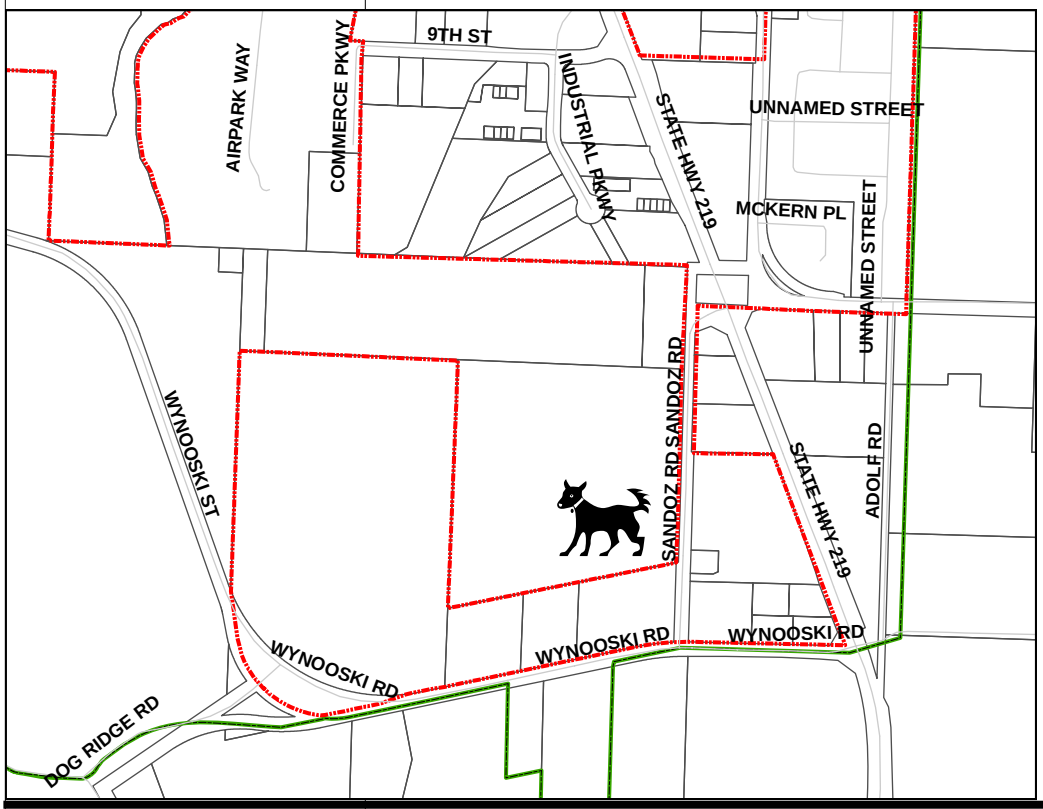
- development fees/financing
- city housing program
- legislation
- education/outreach efforts

The Planning Commission has been in the process of hearing proposed development code changes as outlined in the Affordable Housing Action Plan. The next things on the agenda for their review include changes to the driveway access standards and affordable housing design standards, as well as an update to the housing land supply and need elements of the Comprehensive Plan. The next hearing will be on **February 11, 2010** at 7 p.m. at the Newberg Public Safety Building, 401 E Third Street.

Animal Shelter Update

For more information about the Animal Shelter project, contact Steve Olson at 503-537-1215

The Newberg Animal Shelter is moving! The City recently purchased a property at 1409 Sandoz Road, adjacent to the City's current wastewater treatment plant. A future expansion of the wastewater treatment plant is planned to go onto this property; however, there was enough land to locate the new Animal Shelter on the southeast corner of the property as well.



The property is currently located outside the city limits, and will be on the ballot in May for potential annexation. In the meantime, Yamhill County has approved our conditional use permit application to construct the Animal Shelter on the site. The next steps will be to select a contractor and get building permits submitted for review. If the annexation passes, the Animal Shelter could be constructed and connected to City water and sewer facilities.

FEMA Floodplain Study & Map Update

Our flood maps are being updated! The Federal Emergency Management Agency (FEMA), in cooperation with the Department of Homeland Security, has recently updated the floodplain study for Yamhill County, and converted the associated flood insurance rate maps from the existing paper format to a digital format. Until this update, we had been using paper copies of floodplain maps from the 1980's, which were outdated and difficult to use accurately .

The National Flood Insurance Program is a federal program enabling property owners in participating communities to purchase insurance as a protection against flood losses in exchange for state and community floodplain management regulations that reduce flood damages. Approximately 100 property owners are within flood hazard areas within Newberg. However, almost no development has occurred within the flood hazard areas due to existing land use policies – primarily the Stream Corridor Sub-District zoning overlay. The new development standards will help to:

- minimize public and private financial losses
- minimize expenditure of public money and costly flood control projects
- minimize damage to public facilities
- maintain a stable tax base by providing for the sound use and development of areas of special flood hazard

On January 19, 2010 the Newberg City Council will consider initiating an amendment to the comprehensive plan and development code regarding flood hazard policies and standards. **If initiated, the Planning Commission will consider proposed amendments and make a recommendation to Council on February 11, 2010.** On March 1, the City Council will consider the Planning Commission recommendation and make a final decision on the matter. Note that these dates are tentative and subject to change, so if you are interested in this matter, contact Luke Pelz at luke.pelz@newbergoregon.gov or by the phone number on the right.

For more information about the FEMA floodplain study & map update, contact Luke Pelz at 503-554-7728

Census New Construction Program

It's time again to gather Census data, and the Census Bureau asked for our help to accurately capture new development in the City. The Census Bureau sends out workers to do nationwide address canvassing - looking for living quarters and adding, deleting, and/or correcting addresses on the census list to ensure its completeness. The address canvassing was completed in our area during the spring & summer of 2009. Since we have had new construction happen since that time, the Census Bureau needed our help to report addresses for housing units not yet built at the time of the address canvassing. They are calling this program the 2010 Decennial Census New Construction Program, and the City completed its part in January 2010 by providing the Census Bureau with approximately 100 new addresses.

Our assistance provides the Census Bureau a more accurate count for the 2010 Census. An accurate population count is important for population forecasting, apportionment for the House of Representatives, and federal funding.

For more information about the Census Update, contact Luke Pelz at 503-554-7728

City of Newberg

414 E First Street
P.O. Box 970
Newberg, OR 97132
www.newbergoregon.gov

Phone: 503-537-1240
Fax: 503-537-1272

To receive this newsletter electronically, email Tami at tami.bergeron@newbergoregon.gov and let her know!

Contact Information for the City of Newberg Planning Division:

Barton Brierley, Planning & Building Director: 503-537-1212, barton.brierley@newbergoregon.gov

David Beam, Economic Development Planner: 503-537-1213, david.beam@newbergoregon.gov

Steve Olson, Associate Planner: 503-537-1215, steve.olson@newbergoregon.gov

Jessica Nunley, Assistant Planner: 503-554-7744, jessica.nunley@newbergoregon.gov

Luke Pelz, Assistant Planner: 503-554-7728, luke.pelz@newbergoregon.gov

Tami Bergeron, Office Manager: 503-554-7788, tami.bergeron@newbergoregon.gov

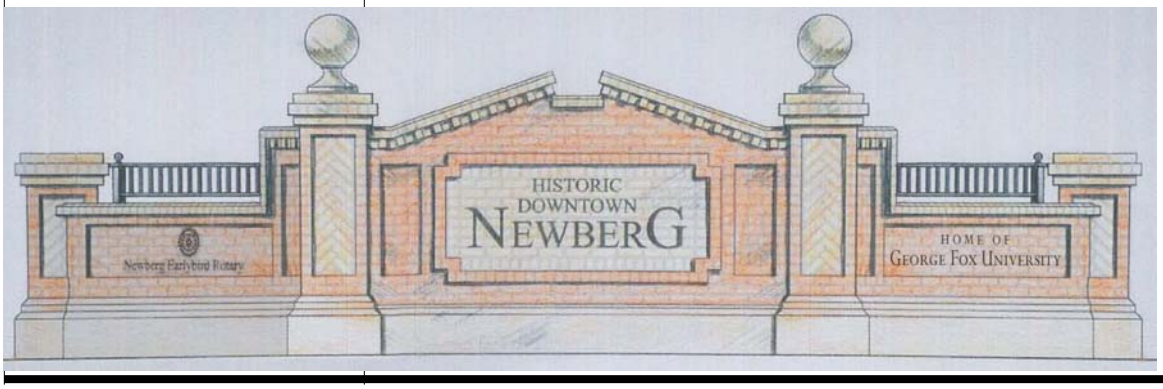
It is with sadness that we inform you of the passing of Elaine Taylor. Elaine passed away peacefully on December 15 after a bout with cancer. Elaine worked as an Associate Planner for the City of Newberg starting in 2004, and she was the former author of this newsletter. She retired in 2009. Her work touched the lives of many and we will miss her lively presence.

Upcoming Public Meetings	
1/19/10	City Council
1/20/10	Newberg Downtown Revitalization Committee
2/1/10	City Council
2/11/10	Planning Commission
2/16/10	City Council
Note: Meeting schedule is subject to change	

Downtown Signs Update

Breezeway Signs: New signs will identify the breezeway path between First Street and the public parking lot off of Second Street behind the First Street businesses. Both the breezeway path and the public parking lot are often underutilized, and this is a way to call attention to them both. The sign on First Street will be a fin type sign, hanging from the brick wall above the breezeway path. The sign on the parking lot side will be a flat wall sign located above the entrance to the breezeway. The finished signs promise to be an attractive addition to the downtown as they will be a carved wood style with painted engraved lettering. The contractor has obtained building permits for the new breezeway signs, and the signs will be up soon.

Downtown Welcome Sign: Newberg's historic business district now has a new welcome sign at the eastern entrance to the downtown (intersection of Highway 99W and River Street.) The beautiful new addition to our community is the result of many long hours of hard work and collaboration by many citizens that share an interest in the vitality of this important part of our community. Special recognition goes to the Newberg Earlybird Rotary Foundation, George Fox University, and the City of Newberg for putting forth the funds necessary to make this project a reality. The sign design, which consists primarily of red and crème colored bricks, is intended to complement the style of some of the more significant buildings in the downtown. This project has been great community effort and is a significant contribution to our revitalization efforts for downtown!



FILE #: CPTA4-09-001

Meeting Type:
___ Planning Commission
X City Council
___ Other:

CITY OF NEWBERG
AFFIDAVIT OF NOTICING

REFERENCE ATTACHED LIST(S)/NOTICE(S)

I, Steve Olson, for the City of Newberg, Oregon, do hereby certify that the attached Notice of Public Hearing was:

a. mailed to the following list of property owners, by United States mail, postage prepaid on _____; (by applicant)

b. noticed in the Newberg Graphic on 1/20/10;
Date faxed to Graphic: 1/15/10
Confirmation that ad will run by: Hilary Lefebvre 1/15/10
Name *Date*

c. posted on the site on date: _____; (by applicant)

d. posted in four public locations (City Hall, Library, Fire Station, Public Safety Building) on date: 1/15/10.

Steve Olson Associate Planner 1/15/10
Signature *Title* *Date*

DATE NOTICE OF DECISION MAILED (AFTER PUBLIC HEARING) _____

Distribution of copies:
notice only: chrono notice file, tickler to check ad, post as noted above
fax file (alpha): notice, fax cover
project file: affidavit and attachments (notice, fax cover letter, fax transmission report)

6/26/01
\\WP\ADMIN\MISC\MICHELE\FORMS\CopyofAffnotfrm.wpd

RE: Notice for 1/20 Graphic

Lefebvre Hilary [HLefebvre@NewbergGraphic.com]

Sent: Friday, January 15, 2010 9:48 AM

To: Steve Olson

Hello, Steve!

Yes, I will schedule this notice to be published in the Graphic this Wednesday, January 20.

Have a great day!

Hilary Lefebvre
Office Manager
The Newberg Graphic
(503) 538-2181

From: Steve Olson [mailto:steve.olson@newbergoregon.gov]
Sent: Friday, January 15, 2010 9:45 AM
To: Lefebvre Hilary
Subject: Notice for 1/20 Graphic

Hello Hilary,
Here is a notice that we need to run in the 1/20 paper. Please confirm if it will be able to run on that date.

Thanks,
Steve Olson

Notice for 1/20 Graphic

Steve Olson

Sent: Friday, January 15, 2010 9:45 AM

To: Hilary Lefebvre [hlefebvre@eaglenewspapers.com]

Attachments: 02-01-10 CC paper.doc (36 KB)

Hello Hilary,
Here is a notice that we need to run in the 1/20 paper. Please confirm if it will be able to run on that date.

Thanks,
Steve Olson

Not noticed.
AM pending
PC result

HEARING NOTICE

The **Newberg City Council** will hold a public hearing on February 1, 2010 at 7 p.m. at the Newberg Public Safety Building, 401 E. Third Street, Newberg, OR, to evaluate the following proposal:

> **Revised Economic Opportunities Analysis.** Consider revisions to the Newberg Economic Opportunities Analysis (EOA). The EOA revisions include updated buildable land inventories for commercial and industrial land, updated demographic and economic statistics, updated information regarding Newberg's economic development strategy, and updates to the Comprehensive Plan land need and supply tables. File # CPTA4-09-001.

You may examine information regarding this proposal at the Newberg Planning and Building Department, 414 E. First Street, Newberg, OR 97132, or on the City's website at www.newbergoregon.gov. The staff recommendation regarding this proposal will be available one week before the public hearing. If you have any questions, please call the Newberg Planning Division at 503-537-1240. All interested persons may appear and provide testimony. Only those persons who participate either orally or in writing in the hearing proceedings leading to the adoption of the action may appeal the decision.

Published: January 20, 2010

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PLANNING COMMISSION RESOLUTION NO. 2009-275

A RESOLUTION OF THE PLANNING COMMISSION OF THE CITY OF NEWBERG RECOMMENDING THAT THE CITY COUNCIL ADOPT THE REVISED ECONOMIC OPPORTUNITIES ANALYSIS AND THE ACCOMPANYING PROPOSED COMPREHENSIVE PLAN AMENDMENTS

1. The original Economic Opportunities Analysis (EOA) was adopted by City Council in January 2006 by Ordinance 2006-2635. The EOA is considered part of the Comprehensive Plan and implements the goals and policies in Section H. The Economy. Much of the information found in the EOA is statistical and dynamic in nature, including demographic and economic statistics, population and employment projections, and buildable land inventories. Therefore, the EOA is not a static document and is meant to be updated with current information from time to time.

2. The revisions to the EOA include updated demographic and economic statistics, updated buildable lands inventory, and an expanded discussion of Newberg's economic development strategy. The accompanying Comprehensive Plan amendments update similar statistical information and add five new policies to Section H.

3. On November 6, 2009, notice of this hearing was included in the News of Newberg's Future newsletter and sent out to the comprehensive mailing list and notice was published in the Newberg Graphic newspaper on November 25, 2009.

4. On December 10, 2009 and January 14, 2010, hearings were held by the Newberg Planning Commission.

NOW THEREFORE, BE IT RESOLVED by the Planning Commission of the City of Newberg that it recommends to the City Council adoption of the revised Economic Opportunities Analysis as shown in Exhibit A and the accompanying Comprehensive Plan Amendments as shown in Exhibit B. This recommendation is based on the staff report, the findings in Exhibit C, and testimony.

Approved by the Planning Commission on this 14th day of January, 2010.

AYES: 6 NAYS: 0 ABSTAIN: 0 ABSENT: 1 (Tri)

ATTEST:

Dawn Karen Bevier
Planning Commission Secretary

Philip D Smith
Planning Commission Chair

Exhibits:
A: Revised Economic Opportunities Analysis
B: Comprehensive Plan Amendments
C: Findings

PLANNING COMMISSION MINUTES
January 14, 2010
7 p.m. Regular Meeting
Newberg Public Safety Building
401 E. Third Street

TO BE APPROVED AT THE FEB. 11, 2010 PLANNING COMMISSION MEETING

I. ROLL CALL:

Present: Lon Wall, Chair; Matson Haug; Derek Duff; Philip Smith; Thomas Barnes; Cathy Stuhr

Absent: Nick Tri (excused)

Staff Present: Barton Brierley, Planning & Building Director
David Beam, Economic Development Planner
Steve Olson, Associate Planner
Jessica Nunley, Assistant Planner
Dawn Karen Bevel, Recording Secretary

Others Present: Denise Bacon (Councilor); Sydney Wermlinger; Marvin Schneider; Lee Does; Sid Friedman

II. OPEN MEETING:

Chair Wall opened the meeting at 7:00 p.m. and asked for roll call.

III. ELECTIONS FOR CHAIR AND VICE CHAIR:

MOTION #1: Haug/Barnes moved to nominate Commissioner Nick Tri as Chair and Commissioner Philip Smith as Vice Chair. (6 Yes/ 0 No/ 1Absent [Tri]) Motion carried.

Vice Chair Smith continued the meeting.

IV. CONSENT CALENDAR:

Vice Chair Smith entertained a motion to accept the minutes of the December 10, 2009 meeting.

MOTION #2: Haug/Barnes to approve the minutes from the Planning Commission Meeting of December 10, 2009. (6 Yes/ 0 No/ 1Absent [Tri]) Motion carried.

V. COMMUNICATIONS FROM THE FLOOR:

Vice Chair Smith offered an opportunity for non agenda items to be brought forth. No topics were brought forward.

VI. LEGISLATIVE PUBLIC HEARING:

APPLICANT: City of Newberg
REQUEST (Hearing continued from December 10, 2009, at the point of deliberation. Public testimony was closed but may be reopened at the discretion of the Planning Commission): Consider revisions to Newberg's Economic Opportunities Analysis (EOA). The EOA, adopted in 2006, is a section of the Comprehensive Plan and also helps implement Statewide Goal 9 (Economic Development). The EOA revisions include updated buildable land inventories for commercial and industrial land, updated demographic and economic statistics, updated information regarding Newberg's economic development strategy, and updates to the Comprehensive Plan land need and supply tables.
FILE NO.: CPTA4-09-001 RESOLUTION NO.: 2009-275

Opening of the Hearing:
Vice Chair Smith opened the public hearing and asked the Commissioners for any abstentions, conflicts of interest, and objections to jurisdiction. None were brought forward. Vice Chair Smith polled those in the audience to see which legislative hearing they were present for; all of whom were in attendance for File Number CPTA4-09-001; Resolution No.: 2009-275.

MOTION #3: Haug/Stuhr moved to change the order of the Legislative Hearings on the agenda with Resolution No. 2009-275 being heard first. (6 Yes/0 No/ 1 Absent [Tri]) Motion carried.

Jessica Nunley, Assistant Planner, presented the staff report and the revised Economic Opportunities Analysis (EOA) (see official meeting packet for full report). The staff recommendation is to pass Resolution 2009-275 recommending that City Council adopt the revised Economic Opportunities Analysis as shown in Exhibit A and the accompanying Comprehensive Plan Amendments as shown in Exhibit B. Ms. Nunley presented the background on the Economic Opportunities Analysis and explained because of concerns voiced by the Planning Commissioners and during public testimony at the December 10, 2009 Planning Commission hearing, staff was prompted to do further revisions using newer data. The reason staff did not include the updated information before this hearing is due to the State Noticing Requirements, which states the draft must be sent in forty-five days prior to a public hearing. Staff sent their draft in October 2009 and the updated information did not come out until November 2009. Ms. Nunley reviewed the revisions from the December 10, 2009 Planning Commission hearing and then responded to issues that were raised at the same meeting as outlined in the official meeting packet.

David Beam passed out two updated handouts to the Planning Commissioners: pages 25 and 26 of the Economic Opportunities Analysis that have been revised.

Commissioner Duff asked how the 35 – 45 minute drive-time from Newberg to downtown Portland was calculated. Ms. Nunley replied it was her actual drive time from Portland to Newberg during the morning and evening rush hour.

Commissioner Wall asked staff to elaborate on letter (q) under General Policies in the Proposed Compressive Plan Amendments, Exhibit B. Barton Brierley explained Newberg needs to be innovative and look for ways that would be a positive outcome for the City as well as businesses.

Vice Chair Smith stated in terms of "small town quality of life" one detail that was not mentioned is Newberg benefits from a steep gradient from the top of the hill down, but that is all county land. Can we make it a county policy to have a green space between Washington County and the City of Newberg? Also, since McKay Road is in Marion County, can we encourage them to keep McKay Road as it is? Jessica Nunley replied Marion County was included in the entire South Industrial process and had no objections to McKay Road being the travel route to I-5. Barton Brierley stated that ultimately, Newberg ought to maintain communication with Marion County and Washington County regarding regional growth issues. Vice Chair Smith referred to Table 12-1: Site Size Distribution by Firm Employment (2010-2030). The report states there are no infill sites available in the Urban Growth Boundary (UGB) that are zoned M-4 sites. Ms. Nunley replied that is correct. Vice Chair Smith referred to page 57 of 284 in the official meeting packet. The assumption for Retail Trade and Retail & Hospitality employment was projected to grow according to Newberg population growth, which is an approved method. For other industries, employment was projected to grow for the 2008 - 2018 period at the same rate as the projected six-county change shown in Table 12 – 2 on page 56, which is also an approved rate. What is the difference in methodology on the employment projections? Barton Brierley explained the regional employment projections are lower than the estimated population growth projections for the 2008 - 2018 period.

Vice Chair Smith stated the previous hearing on this matter was held on December 10, 2009. After public testimony was closed, the Planning Commission began deliberations. Although the public record was closed at the last hearing, the Planning Commission may choose to reopen the record for additional public testimony. Commissioner Haug stated in light of the latest revisions to the Economic Opportunities Analysis, the public hearing should be re-opened.

MOTION # 4: Wall/Duff moved to re-open the public testimony on Resolution 2009-275. (6 Yes/ 0 No/ 1 Absent [Tri])

Vice Chair Smith recessed the meeting at 7:48 PM for a four-minute break.

TIME - 7:52 PM

Proponents: Marvin Schneider congratulated Newberg on planning for the future. This should have been done 20 years ago. The surrounding cities such as Sherwood and Tualatin have known industry is where they get their tax money. Now Newberg realizes employment is needed within the city. Living close to where you work is the answer. Commissioner Haug asked Mr. Schneider how long he has lived in Newberg. Mr. Schneider replied since 1950.

Opponents: Lee Does stated that although he cannot quote exact verses from the Economic Opportunity Analysis, he has read it thoroughly as well as the state economic projections. Many do not want to live in Sherwood or Tualatin and that is the reason why many drive to other communities to work. Traffic will get worse, in time. We do need to grow to stay viable, but education and healthcare are the two areas in which Newberg can grow. Sherwood and Tualatin are not in a valley and can draw on other communities around them; Newberg cannot. The bypass will be a benefit to Newberg, as mentioned in the Economic Opportunity Analysis. In terms of planning 30 years in the future, Mr. Does hopes to grow slowly and carefully. Commissioner Smith asked Mr. Does if he is mainly concerned with the South Industrial Plan. Mr. Does explained he is concerned with industries that are failing right here in town, thus Newberg is not in need of a large amount of land to bring new in new business. There is not a sense of urgency.

Commissioner Wall stated there is urgency for the 14% of those who are unemployed. Although it is difficult to predict the future, Newberg needs to be prepared to bring business into town.

Commissioner Haug stated in his view, this document stands on its own whether the economy is good or bad. Mr. Does wants to protect farmland and does not want to condemn farmlands to growth.

Sid Friedman testified on behalf of 1000 Friends of Oregon and Friends of Yamhill County. These organizations have reviewed the revised Economics Opportunity Analysis and continue to have strong objections, especially now with the revisions. One revision Ms. Nunley did not mention is the Economic Opportunities Analysis is now forecasting more of a job growth in the manufacturing sector then it did previously and is asking for more industrial land then it did in the December 2009 version. The Oregon Employment Department is forecasting 1.7% drop in manufacturing jobs over the long-term. The organizations are pleased that in light of testimony given in December 2009, Newberg did revise the regional employment projections to reflect data that is more current. It is important that the new data be used to determine the outcome and what Newberg is asking for. The fastest growing sector is education and health services. To be clear, the overall job growth projection is not the problem in the Economic Opportunities Analysis but rather the over-allocation of those jobs to the most land consumptive sectors of the economy. The assumptions in the revised table still do not show the impact on the overall acres of which Newberg is requesting. Mr. Friedman raised the issue that it can be assumed that some jobs, which might otherwise locate on larger sites, will be accommodated through infill and through intensification of existing uses. There are so many opportunities and needs to do infill now. Commissioner Wall asked if Mr. Friedman is suggesting the Economic Opportunities Analysis Plan is asking for more industrial land as it is now revised. Mr. Friedman replied the Ad Hoc Committee for Newberg's Future report was based on moderate population growth but they based their employment projection on the high employment growth scenario. He is unsure whether it is more land than the Ad Hoc Committee recommended but it is substantially more land then was included in the December 2009 Economic Opportunities Analysis. Commissioner Stuhr stated there are not many areas in Newberg to grow that do not include farmland. Mr. Friedman stated if the amount of land the City was asking for was more in line with what the numbers support, the various organizations would be less likely to be in opposition. Vice Chair Smith asked about the objections to job forecasting. Table 12.2 shows the State of Oregon projects a 2% decline in manufacturing jobs between the years 2008 – 2018. The Economic Opportunity Analysis is the same and the plan follows that scenario. The state projection is not past 2018, but there is a state approved way of calculating beyond and that is by using population growth. Does he object to that method of calculation? Mr. Friedman reiterated it does not make sense to say manufacturing jobs are on a decline, but suddenly for unexplained reasons, that trend will reverse itself. What is the basis for that assumption? Opinions can differ as to what will happen in the future but it makes sense if a trend is going to reverse itself there is some plausible reason why that is anticipated. The long-term forecast should be based on the best data and projections from presumed experts.

Sydney Wermlinger is a resident of Marion County and McKay Road goes through her farm. The traffic on McKay Road has gone up significantly. The freeway access is inadequate now and will be much worse in 30 years. She voiced her concerns regarding Tables 12.2 and 12.3. Table 12.2 states an increase in jobs in health and education in 10 years; Table 12.3 Newberg projects the job growth to go down 140 jobs. In order to service the population and businesses in Yamhill County, tractors need to travel McKay Road and the semi-trucks coming up behind them is already a safety concern. It is her understanding that the Marion County Commissioners do not want added traffic on that road. Vice Chair Smith urged her to be in contact with her County Commissioners. Commissioner Haug asked for her suggestions on how the traffic situation could be improved. Mrs. Wermlinger understands the

increase in traffic will continue, but local jobs will certainly help. Perhaps access or frontage roads for farm traffic would help. Commissioner Stuhr asked if Mrs. Wermlinger has any confidence in the new state law regarding not being allowed to pass a farm vehicle. Ms. Wermlinger stated she is not aware of the new law.

Vice Chair Smith closed public testimony at 8:45 PM.

Vice Chair Smith asked for final comments from staff. Jessica Nunley stated Newberg already has an adopted Economic Opportunities Analysis from 2006 that shows the land need and supply tables. While that is the basis for future land use decisions including urban land use expansions, it needs to be updated with new information and data. As Vice Chair Smith said about the data methodology staff used for the employment projections, the Urban Growth Boundary rules require a 20-year supply of land, thus a benchmark had to be chosen in order to project past the year 2018. Staff chose the Goal 9 Safe Harbor since it is a defensible method under state law in calculating projections for employment land. In addition, staff does not predict that manufacturing will continue to decline over the next 20 years. As one of the slides showed, 20 years ago the United States was entering a recession yet we have certainly seen growth in most industry sectors since then.

Barton Brierley referred to the Employment Projects on the PowerPoint and explained the education and health services numbers were not shown on the previous table, although they were in the document. He pointed out the growth of health services on the chart. The reason it shows a decline is because the most recent data he could get was from the November 2009. The 2008 education and health services number is an average number and that is why it was higher. From 2008 to 2018, there is a decline in total manufacturing. He noted that it is not just manufacturing that uses industrial land. Wholesale trade uses it, as well as transportation, warehousing and utilities, and construction. The Economic Opportunities Analysis is the explanation for preparing for the future. The entire document explains the need and predictions for the future. Also, regarding the industrial infill potential, adding second shifts can certainly happen and is factored into the table. The current Economic Opportunities Analysis (2006) projects a need for 150 acres of industrial land through the year 2025 and an additional 50 acres through the year 2030.

Commissioner Haug is concerned about what will happen if the large industrial sites attract companies outside our target industries and that offer lesser wages. That is not our vision at all. Is there anything in land use planning to guard against that problem? Barton Brierley replied the most likely method would be to offer assistance to those companies that meet the wage and style of industry Newberg is targeting and offer less assistance for those industries that do not.

Barton Brierley closed the staff summary by stating this is not a plan to greatly increase the amount of industrial land from the current plans that have been adopted. The plan is neither aggressive nor is it shaky, but rather based on sound planning practices that has been endorsed by the State of Oregon. The best professionals have been used in developing the methodologies.

Vice Chair Smith entertained a motion for Resolution 2009-275.

MOTION #5: Haug/Barnes moved to recommend adoption of Resolution 2009-275, the revised Economic Opportunities Analysis.

TIME - 9:07 PM

Deliberation:

Commissioner Barnes asked if George Fox University will be expanding. Barton Brierley replied George Fox has developed a Campus Master Plan for the future. Their vision is to accommodate the growth within their current ownership. Commissioner Barnes does not see the senior health care industry growing in Newberg since Astor House is in need of residents now. Healthcare businesses in Newberg are failing. Commissioner Barnes sees tourism expanding in the future.

Commissioner Stuhr stated the charge of the Planning Commission is to do a reasonable, justified, fact-based job on planning for the future and she does not want to see Newberg unprepared. She is confident this is a middle of the road approach in preparing for the future.

Commissioner Haug stated Newberg needs to pay attention to improving the economy with better job balance. There is no more functional land than what has been identified and presented. Commissioner Haug believes half of the congestion problem is due to traffic going through Newberg, not from within Newberg. This document is going to try to protect Newberg for the future.

Vice Chair Smith recessed the meeting for a five-minute break at 9:19 PM.

TIME - 9:24 PM

Continuation of Deliberation:

Commissioner Wall does not remember a time when staff has ever misled him or given him incorrect information. Everyone has different perceptions. He does not want to embark on projections that are not in line with what the Ad Hoc Committee for Newberg's Future concluded, but that does not seem to be the case. Predicting the future is difficult but Newberg needs to prepare for growth.

Commissioner Duff stated he has lived in Newberg for only three years. His hope is he will be able to work in Newberg in the future instead of commuting to Portland every workday. The facts presented by the Newberg staff are good and they have done a thorough job.

Vice Chair Smith is in favor of the motion. This is an Economic Opportunity Analysis on which the Planning Commission and staff have spent much time. It identifies four main areas of Newberg's employment now and states 80% of new employment ought to be in the areas where Newberg is strong and then develop other areas of business along the way. This is certainly a reasonable methodology for predicting the future.

Vote on Motion #5: (6 Yes/ 0 No/ 1 Absent [Tri]) Motion carried.

TIME - 9:35 PM

APPLICANT: City of Newberg
REQUEST (Hearing continued from December 10, 2009): Consider changes to the Newberg Development Code to support the development of more affordable housing. The changes would do the following:

- **Add a definition regarding "special needs housing";**
- **Allow reduction of parking requirements where an affordable housing development is near a transit stop or where the development provides its own transit;**
- **Modify current driveway standard to allow more than two lots per driveway; and,**
- **Define the process for allowing accessory dwelling units**

FILE NO.: G-09-007 RESOLUTION NO.: 2009-273
CRITERIA: Newberg Development Code § 151.122(B)

Opening of the Hearing:
Vice Chair Smith opened the public hearing and asked the Commissioners for any abstentions, conflicts of interest, and objections to jurisdiction. None were brought forward. David Beam, Economic Development Planner, presented the staff report (see official meeting packet for full report).
Staff recommends adopting the proposed amendments to the Newberg Development Code, as detailed in Exhibit A in the resolution.

TIME - 9:52 PM

Deliberation:

The Planning Commission deliberated on the proposed changes (see official meeting packet).

Commissioner Stuhr pointed out a typographical error on Exhibit A, page 20 under §151.003 Definitions under **Special Needs Housing** as follows: the word "*developmental*" should replace "*developmentally*"

Clarify the planning process for construction of accessory dwelling units:
Commissioner Haug is not comfortable with Type I and believes Type II is more appropriate. There is no reason to be so aggressive and doing this will take the rights of the local community away.

Commissioner Wall stated it may cost a lot of money to the property owner if there is an appeal. This counters our goal of more affordable housing.

Commissioner Stuhr is concerned that this particular issue is beyond the issue of affordable housing. She agrees with Commissioner Haug.

Reduce parking requirements for affordable housing projects with nearby transit access:
Commissioner Smith asked staff if 10% reduction is enough to interest a developer or would 20% be better. David Beam replied it depends on how large the project is; the bigger the project, the more of an incentive it would be for the developer. Barton Brierley stated the main cost with providing parking is space.

Commissioner Haug asked how tightly the proposed parking reduction ties into affordable housing. If we allow a reduction in parking, there should be a requirement to provide some affordable housing. Barton Brierley replied that the proposal not restricted to affordable housing projects. Granting the reduction is at the review body's discretion. Vice Chair Smith stated there is a conflict between what Mr. Brierley stated and the actual wording on page 16 of 284 in the staff recommendation. That discrepancy was noted and will be corrected.

Commissioner Duff asked in terms of mass transit, where would such developments logistically go. He is a proponent of mass transit. Vice Chair Smith stated there needs to be a change in the language stating less than one hour regular service intervals during commuting hours. Although this change won't likely change much today, someday it will.

Modify current driveway standard to allow more than two lots per driveway:
Vice Chair Smith stated that if this comes out of a desire for affordable housing, he suggested increasing the number of houses on a driveway, thus tying the two together making it more appetizing for a developer.
The width of the driveway also needs to be taken into consideration due to the need for emergency vehicle access. Commissioner Haug clarified by stating there are currently two homes allowed per driveway. If that number is increased to 3 – 6 homes, there needs to be a requirement that some of those will be affordable units. He continued to explain he is not in favor of private streets.

Commissioner Wall stated his only objection to private streets is the accessibility of emergency vehicles. The street standards need to be changed or better yet, have a specific variance street standard. If it meets affordable housing guidelines, a public street can be just as narrow and inexpensive as putting in a private street and the City would have jurisdiction over it. He is concerned that currently there is no requirement of a maintenance agreement. Newberg has a poor record of enforcing maintenance agreements of all kinds.

Commissioner Barnes asked how alleys are classified, such as those in the Orchard Lair development. Barton Brierley replied most of them are public alleys and frontage is required on a public street for the homes in Orchard's Lair. Commissioner Haug stated there are many opportunities to develop flexibility.

Vice Chair Smith entertained a motion for Resolution 2009-273.

MOTION#6: Stuhr/Duff moved to adopt Resolution 2009-273 with the following changes: Section 151.003 make the typographical change to "*developmental*" from "*developmentally*"; Section 151.191 request the Type II process; Section 151.612 change language as follows: "At the review body's discretion, *affordable housing* projects may reduce the required off-street parking by 10% if there is an adequate continuous pedestrian route no more than 1,500 feet in length from the development to transit service with *an* average of less than one hour regular service *intervals* during *commuting hours* or where the development provides its own transit."; and table Section 151.703 to be reviewed further by staff. {6 Yes/ 0 No/ 1 Absent [Tri]) Motion carried.

TIME – 10:30 PM

VII. ITEMS FROM STAFF:

Update on Council items:

Barton Brierley stated Resolution 2009-275 will go before the City Council on February 1, 2010.

Other reports, letters, or correspondence:

The City has received money to do an Infrastructure Financing Plan for industrial land along Wynooski Road and other areas that may be added to the Urban Growth Boundary.

The next Planning Commission meeting is scheduled for February 11, 2010 at which time the Commission will be considering the new flood plain maps for Newberg submitted by the Federal Emergency Management Agency (FEMA) for adoption, as well as a Flood Plain Ordinance that has been drafted by staff.

Commissioner Wall learned that apparently audience members and/or interested parties can request copies of personal notes that have been written by the Commissioners because they are part of the record. Terrence Mahr, City Attorney will be explaining the guidelines in the near future. Commissioner Haug stated he sees no harm in it as long as he has a copy himself.

Commissioner Haug stated the Citizen's Rate Review Town Hall Meeting took place last evening. There will be a public hearing on January 27, 2010 at 7 pm in the Public Safety Building.

Commissioner Stuhr asked for an update on Fred Meyer. Barton Brierley has received recent correspondence from them and anticipates they will be back in the next few months.

VIII. ITEMS FROM COMMISSIONERS:

IX. ADJOURN:

Vice Chair adjourned the meeting at 10:38 PM.

Approved by the Planning Commission this 11th day of February, 2010.

AYES: 7 **NO:** 0 **ABSENT:** 0 **ABSTAIN:** 0

(List Name(s)) **(List Name(s))**

Dawn Karen Bevill
Planning Recording Secretary

Planning Commission Chair

PLANNING COMMISSION MEETING
ROLL CALL & MOTIONS RECORDING FORM - ~~2009~~ 2010

DATE: January 14, 2010
LOCATION: Newberg Public Safety Building or _____

✔	ATTENDANCE	#2 MOTIONS: 12-10-09 Minutes Approval	#1 MOTIONS: Nominated Nick Tri as Chair; Philip Smith Vice Chair		#3 MOTIONS: Change the agenda order; Hearing CPTA-09-001 first.	#4 MOTIONS: To open public testimony on Resolution 2009-245
✓	BARNES, THOMAS	Y	Y		Y	Y
✓	HAUG, MATSON	Y	Y		Y	Y
✓	DUFF, DEREK	Y	Y		Y	Y
✓	SMITH, PHILIP	Y	Y		Y	Y
✓	STUHR, CATHY	Y	Y		Y	Y
X	TRI, NICK – **VICE CHAIR**	—	—	—	—	—
✓	WALL, LON -- **CHAIR**	Y	Y		Y	Y
—	GOLSON, AMANDA **STUDENT PC**	—	—	—	—	—
RESOLUTION #:						
COMMISSIONER THAT MOTIONED: (1ST & 2ND)		Haug / Barnes	Haug / Huff	—	Haug / Stuhr	Wall / Duff
VOTE ON MOTION:		Motion Carried	Motion Carried		Motion Carried	Motion Carried
CONDITIONS:						

STAFF PRESENT:

- ☒ **Barton Brierley, Planning Director**
- ☒ **Jessica Nunley, Assistant Planner**
- ☒ **Steve Olson, Association Planner**
- ☒ **David Beam, Econ. Dev. Coordinator/Planner**
- ☐ **Luke Pelz, Assistant Planner**
- ☐ ~~David King, Recording Secretary~~
- ☒ Dawn Karen Bevill, Recording Secretary
- ☐ Crystal Kelley, Recording Secretary

OTHER CITY PERSONNEL PRESENT:

- ☐ _____
- ☐ _____
- ☐ _____

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PLANNING COMMISSION MEETING
ROLL CALL & MOTIONS RECORDING FORM - ~~2009~~ 2010

DATE: January 14, 2010
LOCATION: Newberg Public Safety Building or _____

✔	ATTENDANCE	*Minutes Approval*	To adopt Resolution 2009-275 (#5 MOTIONS)	adopt Resolution 2009-273 with Corrections (#6 MOTIONS)		
✓	BARNES, THOMAS		Y	Y		
✓	HAUG, MATSON		Y	Y		
✓	DUFF, DEREK		Y	Y		
✓	SMITH, PHILIP		Y	Y		
✓	STUHR, CATHY		Y	Y		
X	TRI, NICK – **VICE CHAIR**		—	—		
✓	WALL, LON -- **CHAIR**		Y	Y		
—	GOLSON, AMANDA **STUDENT PC**		—	—		
RESOLUTION #:			2009-275	2009-273		
COMMISSIONER THAT MOTIONED: (1ST & 2ND)			Haug/Barnes	Stuhr/Duff		
VOTE ON MOTION:			Motion Carried.	Motion Carried.		
CONDITIONS:						

STAFF PRESENT:

- ☒ **Barton Brierley, Planning Director**
- ☒ **Jessica Nunley, Assistant Planner**
- ☒ **Steve Olson, Association Planner**
- ☒ **David Beam, Econ. Dev. Coordinator/Planner**
- ❒ **Luke Pelz, Assistant Planner**
- ❒ ~~David King, Recording Secretary~~
- ☒ Dawn Karen Bevill, Recording Secretary
- ❒ Crystal Kelley, Recording Secretary

OTHER CITY PERSONNEL PRESENT:

❒ _____

❒ _____

❒ _____

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City of Newberg

Planning Division
P.O. Box 970 ▪ 414 E First Street ▪ Newberg, Oregon 97132
503-537-1240 ▪ Fax 503-537-1272 ▪ www.ci.newberg.or.us

Planning Commission Staff Report
Revised Economic Opportunities Analysis

File No.: CPTA4-09-001
Proposal: Adopt the revised Economic Opportunities Analysis and the accompanying Comprehensive Plan Amendments.

Planning Commission Hearing Date: January 14, 2010. The previous hearing on this matter was held on December 10, 2009. After public testimony was closed, the Planning Commission began deliberations. The Commission made a main motion and a subsidiary motion, and then tabled the main motion. Because we have started a new year and a new session, by Planning Commission rules the Commission must start over with a new motion for this item. Although the public record was closed at the last hearing, the Planning Commission may choose to reopen the record for additional public testimony, particularly in light of the latest revisions to the EOA document.

Summary of Proposal: The original Economic Opportunities Analysis (EOA) was adopted by City Council in January 2006 by Ordinance 2006-2635. The EOA is considered part of the Comprehensive Plan and implements the goals and policies in Section H. The Economy. Much of the information found in the EOA is statistical and dynamic in nature, including demographic and economic statistics, population and employment projections, and buildable land inventories. Therefore, the EOA is not a static document and is meant to be updated with current information from time to time. The accompanying Comprehensive Plan amendments update similar statistical information and add five new policies to Section H. Having an updated EOA also ensures the city's compliance with Statewide Planning Goal 9: Economic Development.

Revisions from the December 10, 2009 Planning Commission hearing:
At the time that the previous (November 2009) version of the EOA was being prepared we did not have access to the latest data from the Employment Department (the data was released in November and we had to send our 45-day notice with a complete draft to DLCD in October); we have since decided to go back, update our methodologies, and run our formulas using this latest data. In particular, changes have been made to the following sections of the EOA: Section II – Newberg Employment Characteristics; Section III – Regional Employment Projections and Newberg Employment Projections; and Section V – entire section. Several of the changes are also shown below as responses to the 12/10/09 Planning Commission hearing. You will find attached a comparison version of the changed areas of the report as well as a full copy of the revised EOA as of January 2010.

Response to issues raised at the December 10, 2009 Planning Commission hearing:
Many important issues were raised at the previous Planning Commission meeting that we would like to address. We take the public comments and concerns seriously and hope we will answer some questions here.

a. **"Small town quality of life" –** This phrase is commonly used to explain positive aspects of a small town and why people love to live in them, or to refer to a place that has the same values but might be somewhat larger than "small town". It is important to keep in mind that "small" is relative – Newberg's population of 23,150 makes it the 22nd largest city in Oregon; a city with a population that size in California would be the 274th largest city and would be in the bottom half of population rankings. Through this phrasing we are trying to communicate that Newberg, while perhaps not as "small town" as it used to be, still embodies many of the values and qualities that a small town might have.

   The qualities we have listed in the EOA are those "small town quality of life" standards we believe Newberg has – relatively affordable housing, attractive rural setting in the heart of wine country, attractive historic downtown, full service city separate from the Portland metropolitan area with a deep sense of community and history, and a high level of community engagement (formerly "social capital"). We might also add strong school system, availability of parks, less crime, and shorter internal commute time as things Newberg has that are representative of "small town quality of life". The "small town quality of life" label may be amended at your discretion; it is merely meant to represent that Newberg has many qualities representative of many small towns that make it attractive relative to other cities in the region. If the Planning Commission chooses to change the wording, a suggestion has been made to instead have comparative advantage #1 read as follows (p. 27 of January 2010 version):

   1. Full service city separate from Portland METRO area
      a. Relatively affordable housing
      b. Attractive rural setting in heart of wine country
      c. Historic downtown
      d. Deep sense of community and service

b. **Proximity to Portland –** We do believe that Newberg has relatively good access to the Portland metropolitan area and that this gives Newberg a comparative advantage for locating a business. Real time driving reveals that it takes approximately 35-45 minutes to get to Newberg from Portland during the morning rush hour, and approximately 45-65 minutes to get from Newberg to Portland during the evening rush hour. This proximity makes it possible for Newberg to have relatively easy access to the Port of Portland for travel and shipping needs. In addition, the proximity allows for Newberg to be actively involved in regional economic development efforts.

c. **Travel time to I-5 –** Newberg has very good proximity to I-5 relative to other communities in the region. The route to I-5 from Newberg is a two-lane highway with very little traffic and goes to the relatively uncongested Donald/Aurora interchange. Travel time from Newberg to I-5 ranges from approximately 15-30 minutes according to Google Maps Driving Directions and Mapquest. The Donald/Aurora interchange is not ideal and does have some issues with its turning configurations; however, it does still have capacity to handle traffic and is a better option than going north to get on I-5 through Tualatin-Sherwood Road. Staff believes it is a distinct advantage to have this easy, uncongested access to I-5 and will continue to work with ODOT in the future regarding capacity and improvements.

d. **Employees per acre –** Some cities determine their land needs by first determining the average number of employees per acre their industries use, then dividing that number into the projected population to establish how many acres the city will need for employment. Newberg does not use this method of calculation. Instead, we first determine the land needs of prospective employers

based on our target industries. We then calculate the number of sites needed for each category of size of firm. The total acreage is determined by multiplying the number of sites needed by the average site size for that category of firm. This ensures that there will be enough sites available for the number of firms expected. Initial employment on each site may be low, but will likely grow over time. An overall average number of employees per acre can be calculated, but this factor is not used to calculate our acreage needs. We use this method because if Newberg does not have the site sizes needed by employers, it will not be able to retain or attract the industries it seeks. The projections in the revised (January 2010) EOA are for an average of approximately 10 employees per acre through 2030. For the longer term 2031-2040 period, we did use the suggested 11 employees per acre number because site size needs for that period have not yet been determined.

e. **Industrial infill potential –** The EOA does include allowances for industrial infill and redevelopment. The previous table (in the November 2009 version) was a little unclear and made it appear that all new projected jobs were allocated to new land needs. The table has been revised (in the January 2010 version) to make it clear that some of the smaller industrial land needs will be made up through infill and redevelopment and will not require new land.

Table 12- 1: Site Size Distribution by Firm Employment (2010-2030)

Employees per Firm	Percent of Employment	Number of Employees	Number of Firms	Sites Needed	Size Range (Acres)	Average Site Size (Acres)	Average ROW Need (Acres)	Gross Buildable Acres Needed
0-9	15%	246	41	21	<2	1	0.15	24
				20	*infill & redevelopment*			0
10 to 74	40%	657	19	13	2 - 10	5	0.75	75
				6	*infill & redevelopment*			0
75 to 150	15%	246	2	2	10 - 30	20	1.00	42
150+	30%	493	1	1	30 - 50	40	2.00	42
Total	100%	1,642	63	63				183

The data is based on the assumption that most sites under 10 acres will be located in industrial parks, which will require dedication of an average of 15% right-of-way for streets and utilities. For sites over 10 acres, the table assumes 5% of the area for streets and utilities. The table also includes assumptions that most (55%) of Newberg's future industrial employment will be located on sites 10 acres or less, and that one-third of those future new industrial firms under 10 acres in size, and one-half of firms under 2 acres in size, will find a site through infill redevelopment or intensification of existing employment land uses (EOA, p. 45, January 2010 version). These efficiency measures – calculating a small percentage for future right-of-way, and assuming infill and redevelopment will make up some of the land need – allow for greater certainty when calculating land need. These efficiency measures have been seen in Newberg as many industrial users (including A-dec, Harris Thermal, Climax, and SP Newsprint) have expanded on their current sites, using infill development to stay in the same place.

One comment was whether infill should be assumed for larger sites as well. The table is used to determine the number of new large industrial sites needed. It does allow that some of the large site employment could be in expansion of existing larger sites. For example, 246 employees were allocated to the "75-150 employees" category. This translates into either 2 or 3 sites. At the high

end, this could be 3 firms employing an average of 75 employees each, leaving 21 employees for "infill" of existing sites. At the midpoint, it could be 2 firms employing 113 employees each, leaving 20 employees for infill. To get down to only 1 firm, you would have to assume that 96 to 171 employees would be "infill", or 40% to 70% of the employment. This seems unlikely because as stated earlier many of the existing firms have infilled already, leaving only modest room for more infill. Notably, neither of Newberg's current largest campuses are likely to have much if any infill. Employment at SP Newsprint is unlikely to rise over the planning period. The A-dec campus has infilled numerous times over the past decade, and has little additional potential for further infill. Further expansion is more likely to occur on adjoining buildable land being held by the business owner.

f. **Employment projections –** As stated above, the November 2009 version of the EOA used the data available as it was necessary to send DLCD the 45-day notice with a full version of the report. However, in light of the recent data released by the Employment Department and comments and concerns raised at the 12/10/09 Planning Commission meeting, staff revised employment projections and land needs using the new data. The January 2010 version of the EOA uses combined employment projections for Regions 2, 3, and 15 (economic regions designated by the Employment Department) because Newberg is uniquely situated where the three regions meet. Newberg's geographic position means that it attracts both workers and residents due to its proximity to other cities and economic regions.

Excerpted from the EOA (p. 25 in the January 2010 version):

Regional Employment Projections

In November 2009, the Oregon Employment Department issued employment projections for 2008-2018. These projections considered the recession in the late 2000's, and projected a slow recovery over the coming decade. Table 12- 2 shows the combined employment projections for Region 2 (Multnomah and Washington Counties), Region 3 (Marion, Yamhill, and Polk Counties), and Region 15 (Clackamas County). The combined projection was used because Newberg is almost centrally located within this six county region.

Table 12- 2: Combined Employment Projection for Regions 2, 3, and 15, 2008-2018 (Multnomah, Washington, Marion, Polk, Yamhill, & Clackamas Counties)

Industry	2008	2018	% Change
Construction	57,410	58,600	2.07%
Manufacturing	121,270	119,200	-1.71%
Wholesale Trade	55,840	61,100	9.42%
Retail Trade	108,630	117,700	8.35%
Transportation, Warehousing & Utilities	36,480	38,300	4.99%
Information	23,500	24,200	2.98%
Financial Activities	68,970	72,300	4.83%
Professional & Business Services	81,720	88,700	8.54%
Education & Health Services	94,490	107,500	13.77%
Leisure & Hospitality	79,610	86,200	8.28%
Other Services	61,890	65,000	5.03%
Government	114,640	120,300	4.94%
Total	**904,450**	**959,100**	**106.04%**

Source: Oregon Employment Department.

Newberg Employment Projections

Newberg employment projections for 2010-2040 were made consistent with the "safe harbor" methodology described in OAR 660-024-0040(9)[1]. This methodology allows a local government to estimate that the current number of jobs in the urban area will grow either at a rate equal to the Oregon Employment Department regional job forecast rates, or at a rate equal to the population growth rate for the urban area. Future employment projections for the Newberg urban area were made using a combination of these allowed methodologies.

Retail trade and leisure & hospitality employment was projected to grow according to Newberg population growth. This was done because the need for retail services typically grows along with population, and also because of Newberg's strong potential for leisure & hospitality employment growth in its targeted industry cluster of wine/tourism.

For other industries, employment was projected to grow for the 2008-2018 period at the same rate as the projected six-county change shown in Table 12- 2 above. For employment projections beyond 2018, employment was projected to grow at the same rate as the projected population growth. This rate is in accordance with the safe harbor provision stated above, and allows Newberg to plan adequately for the 20-year planning horizon to 2030. This is essential for Newberg to maintain its desired jobs-housing balance into the future and to avoid becoming solely a bedroom community.

Table 12- 3: Projected Newberg Employment through 2040

Industry	2009	2018	2020	2025	2030	2035	2040
Construction	390	656	700	798	892	1,005	1,125
Manufacturing	2,201	2,514	2,685	3,057	3,417	3,851	4,312
Wholesale Trade	73	106	113	129	144	162	181
Retail Trade	841	1,008	1,077	1,226	1,370	1,544	1,729
Transportation, Warehousing & Utilities	181	191	204	232	259	292	327
Information	45	56	60	68	76	86	96
Financial Activities	241	283	303	345	385	434	486
Professional & Business Services	321	474	507	577	645	727	814
Education & Health Services	3,285	3,147	3,361	3,827	4,278	4,821	5,398
Leisure & Hospitality	1,018	1,085	1,159	1,320	1,476	1,663	1,862
Other Services	409	434	463	528	590	665	744
Government	175	192	205	233	261	294	329
Total	**9,180**	**10,144**	**10,836**	**12,339**	**13,792**	**15,544**	**17,404**
Cumulative from 2009	-	965	1,657	3,159	4,612	6,364	8,224

[1] OAR 660-024-0040 (9) states: *The following safe harbors may be applied by a local government to determine its employment needs for purposes of a UGB amendment under this rule, Goal 9, OAR chapter 660, division 9, Goal 14 and, if applicable, ORS 197.296.*
(a) A local government may estimate that the current number of jobs in the urban area will grow during the 20-year planning period at a rate equal to either:
(A) The county or regional job growth rate provided in the most recent forecast published by the Oregon Employment Department; or
(B) The population growth rate for the urban area in the adopted 20-year coordinated population forecast specified in OAR 660-024-0030.
Note that the employment projections made are for a longer period than the 20-year period. Thus, employment projections beyond this 20-year period are not currently a "safe harbor" suitable for UGB amendments, though they could become a "safe harbor" for future UGB amendments.

g. **South Industrial Area Master Plan as a "special opportunity" –** The South Industrial Area Master Plan (SIAMP) helps Newberg be in compliance with Statewide Planning Goal 9. Goal 9 states that "Comprehensive Plans for urban areas shall…Provide for at least an adequate supply of sites of suitable sizes, types, locations, and service levels for a variety of industrial and commercial uses consistent with plan policies". The SIAMP is primarily a vision plan for the area south of Newberg, on either side of Highway 219. Through careful consideration of many potential areas around the city limits, the south area was viewed as a suitable location for future industrial opportunities. The City will be undergoing further review of all potential industrial areas as we move forward with an urban growth boundary expansion to add industrial land. State law does not preclude expanding the UGB onto agricultural land; that type of land may be included according to the prioritization hierarchy laid out by ORS 197.298 and OAR 660-024. If there are other higher priority lands that meet the site suitability characteristics, they would be included first. However, having the SIAMP already in place is a good first start to analysis and future planning that will enable the City to meet the requirements of Goal 9. Therefore, the SIAMP may be considered a "special opportunity".

h. **Environmental protection –** We feel that Oregon's statewide planning goals do a very good job of inherent environmental protection through regulation of land use. The UGB system does a good job of giving cities a clear path to preserving urbanizable land for the future to create complete cities. The rules compel cities to provide an adequate amount of land in the UGB for housing, jobs, schools, and other facilities. There are several purposes served through future planning to have adequate land inside a UGB, including: preservation of farm & forest land outside a UGB; less congestion on area roadways and pollution created by commuters if adequate jobs are provided within the city; and distinct separation between urban and rural uses.

i. **Lack of existing industrial sites as a "disadvantage" –** We do have a few vacant industrial sites that are primarily considered as expansion or development sites for their current owners. Therefore, while those sites are vacant, they are not necessarily "available" for industrial development by other users. However, the sites have been included within the buildable land inventory as developable land. The fact that some employers are holding onto land for future expansion or development is not a disadvantage in itself, but is listed as one reason to help explain the disadvantage of Newberg lacking an adequate supply of suitable industrial land.

j. **Urban growth boundary amendment process –** UGB expansions are governed by state law: Oregon Administrative Rule (OAR) 660-024, Oregon Revised Statute (ORS) 197.298, and Statewide Planning Goal 14. The ORS governs the priority of land to be included within the UGB. Goal 14 and the OAR lay out the process for a UGB expansion. The overall process has two parts – first, jurisdictions must determine their land need, based on coordinated 20-year population forecasts; and second, jurisdictions must evaluate possible locations for expansion of the UGB. The UGB land need is based on 20-year population forecasts because the UGB is meant to "provide for needed housing, employment and other urban uses such as public facilities, streets and roads, schools, parks and open space over the 20-year planning period…" (OAR 660-024-0040(1)). Once the land need (in acres) is determined, the jurisdiction then moves to the land evaluation phase to determine where the boundary should be located. The boundary location analysis is conducted in accordance with the land priorities specified by the ORS and Goal 14.

The reason that the EOA should be completed before the UGB process can begin is because the EOA contains all the data that the UGB findings are based on. The EOA has the latest population and employment forecasts, land need and supply tables, site suitability characteristics, and other features that UGB findings rely upon.

k. **Inconsistencies in lists of targeted industries –** It was pointed out that Table 12-15: Newberg Targeted Industries lists "sports apparel/recreation-related products" as a targeted business type under general manufacturing but that then Table 12-16: Site Size Ranges by Targeted Industry Cluster and Sector lists "sports and recreational campus" and has it needing a 10-50 acre site. The reason for this difference is that "sports apparel/recreation-related products" is a manufacturing business type, while "sports and recreational campus" is a general manufacturing use. It may be assumed that several sports apparel/recreation related product manufacturers could be located on one sports and recreational campus, particularly according to the large lot or PUD rules in the new M-4 Industrial zoning district. As such, this is accurately shown in the large lot needs.

l. **Health care as a targeted industry –** The health care industry is one of our four targeted industry clusters that we refer to throughout the EOA. The reason that it was not discussed and displayed more throughout the industrial land needs and supply section is that it primarily does not use industrially zoned lands. Health care uses are typically found on lands that are zoned Institutional or Commercial (which allows for medical office type uses). Newberg's main health care employer, Providence Newberg Medical Center, has existing land for expansion near its current facility. The January 2010 version of the EOA has been updated to include tables with calculations for office space utilizing employment (Table 12-25, p. 51) and office land needs (Table 12-26, p. 52).

m. **Actual businesses looking for development sites –** Attachments 8 and 9 show snapshots of businesses that were actually looking for or purchased development sites in Oregon over the past three years. Much of this type of data is confidential; as such, these snapshots of the past three years are the best data we currently have. You can see that many of the businesses are looking for sites that meet the same site suitability criteria we have listed – proximity to transportation and services, compatibility (many list required zoning), and many are looking for larger lot sizes (an August 2009 purchase was 2+ acres, an October 2008 purchase was 12+ acres, and many of the prospective businesses were looking for large acreage sites). At this time, Newberg would largely be unable to attract these prospective businesses, due to our lack of suitable industrial land.

ATTACHMENTS:

Planning Commission Resolution 2009-275 with:

Exhibit A: Revised Economic Opportunities Analysis (January 2010)
Exhibit B: Comprehensive Plan Amendments (January 2010)
Exhibit C: Findings

1. Comparative Version of the EOA (November 2009 version to the January 2010 version)
2. Letter from Tom Fox, dated December 1, 2009
3. Comments from Steve Oulman, dated November 30, 2009
4. Public Comments, received prior to or at the December 10, 2009 Planning Commission hearing
5. Johnson-Gardner report: *City of Newberg – Demand for Commercial and Industrial Land*, 2004
6. Employment Projections by Industry and Occupation, 2008-2018, Region 3 (Marion, Polk, and Yamhill Counties), Oregon Employment Department
7. Portland Metro Labor Trends, December 2009, Oregon Employment Department
8. Snapshot of Statewide Recruitment, Retention & Expansion Projects (July 2006), OECDD
9. Coldwell Banker Commercial brochures (with recent transactions and current client needs), December 2007, October 2008, August 2009
10. Public Comments, received after the December 10, 2009 Planning Commission hearing
    (*Note: The Planning Commission will have to vote to reopen the public testimony to accept these new comments and other new testimony)*

Revised Economic Opportunities Analysis

PLANNING COMMISSION HEARING
RESOLUTION 2009-275
JANUARY 14, 2010

Staff Request

Pass Resolution 2009-275, recommending that the City Council adopt the revised Economic Opportunities Analysis and the accompanying Comprehensive Plan Amendments.

Background of the EOA

- Original EOA was adopted by City Council in 2006
- EOA is considered part of the Comprehensive Plan and implements the goals & policies in Section H (The Economy)
- Having an updated EOA ensures continued compliance with Statewide Planning Goal 9: Economic Development
- Testimony and concerns heard at 12/10/09 Planning Commission hearing prompted further revisions using newer data

Summary of EOA

- Demographic & economic statistics help us plan for future populations
- Targeted industries: manufacturing, health care, higher education, wine/tourism
- Assessment of community's economic development potential to retain & attract targeted industries
- Employment land inventories (industrial & commercial)

Summary of EOA Revisions

- Updated population, demographic, economic & employment statistics
- Economic trends analysis (national, state & regional)
- Assessment of community economic development potential
  - Employment projections
  - Comparative advantages & disadvantages
  - Special opportunities in the regional marketplace
- Economic development strategy
- Updated buildable land inventories & maps

New Revisions to EOA (January 2010 draft)

- Incorporated the November 2009 data from the Oregon Employment Department into employment projections
- New employment projections led to revised buildable land supply and need tables
- Clarified information in some tables

Issues Raised at the 12/10/09 Hearing

- "Small town quality of life"
- Proximity to Portland
- Travel time to I-5
- Employees per acre
- Industrial infill potential
- Employment projections
- South Industrial Area Master Plan – "special opportunity"
- Environmental protection
- Lack of existing industrial sites as a "disadvantage"
- Urban growth boundary amendment process
- Inconsistencies in lists of targeted industries
- Health care as a targeted industry
- Actual businesses looking for development sites

"Small Town Quality of Life"

- "Small" is relative
- Phrasing meant to communicate that Newberg embodies many of the values and qualities a small town might have:
  - Relatively affordable housing, attractive rural setting, attractive historic downtown, full service city separate from metro area, high level of community engagement.
  - Other things Newberg has: strong school system, availability of parks, less crime, shorter internal commute time.
- You may choose to call it something else ...?

Proximity to Portland

- Comparative advantage for locating a business:
  - 35-45 minutes to Newberg from Portland during morning rush hour
  - 45-65 minutes to get to Portland from Newberg during evening rush hour
- Proximity makes it possible for Newberg businesses to have relatively easy access to the Port of Portland
- Proximity allows Newberg to be involved in regional economic development efforts

Travel Time to I-5

- Newberg has good proximity to I-5 relative to other communities in the region
  - 15-30 minute drive to I-5 (Donald/Aurora interchange) via McKay Road
- Donald/Aurora interchange is not ideal, but does still have capacity and a better option than reaching I-5 through Tualatin-Sherwood Road
- A comparative advantage to have easy, uncongested access to I-5
- City will continue to work with ODOT in the future regarding capacity & improvements

Employees per Acre

- Newberg's method is not based on emp/acre:
  - Determine the land needs of prospective employers based on our target industries
  - Calculate the **number of sites** needed for each category of firm size
  - This recognizes that an industry may initially purchase a larger site than needed for current needs, but will infill over time
  - Multiply: number of sites needed x average site size by firm = total acreage needed
- An average number of employees per acre may be calculated, but this factor is not used to determine acreage needs
  - 2010-2030 average employee per acre = ~10
  - 2031-2040 average employee per acre = 11 (estimated because site size needs are not yet known)
  - These averages are typical for businesses in Newberg

Industrial Infill Potential

- Revised table (for clarity):

Site size distribution by firm employment - 2010-2030

Employees per Firm	Percent of Employment	Number of Employees	Number of Firms	Sites Needed	Size Range (Acres)	Average Site Size (Acres)	Average ROW Need (Acres)	Gross Buildable Acres Needed
0-9	15%	246	41	21	<2	1	0.15	24
				20	*infill & redevelopment*			0
10 to 74	40%	657	19	13	2 - 10	5	0.75	75
				6	*infill & redevelopment*			0
75 to 150	15%	246	2	2	10 - 30	20	1.00	42
150+	30%	493	1	1	30 - 50	40	2.00	42
Total	100%	1,642	63	63				183

- Some land and job needs will be made up through infill
- It's possible that some employees will be sited on infill/redevelopment of existing large sites

Employment Projections - Regional

- Using updated data from OR Employment Dept
- Combined employment data from Regions 2, 3, 15

Industry	2008	2018	% Change
Construction	57,410	58,600	2.07%
Manufacturing	121,270	119,200	-1.71%
Wholesale Trade	55,840	61,100	9.42%
Retail Trade	108,630	117,700	8.35%
Transportation, Warehousing & Utilities	36,480	38,300	4.99%
Information	23,500	24,200	2.98%
Financial Activities	68,970	72,300	4.83%
Professional & Business Services	81,720	88,700	8.54%
Education & Health Services	94,490	107,500	13.77%
Leisure & Hospitality	79,610	86,200	8.28%
Other Services	61,890	65,000	5.03%
Government	114,640	120,300	4.94%
Total	**904,450**	**959,100**	**6.04%**

Employment Projections - Newberg

- Using updated data from OR Emp Dept for 2008-2018
- Beyond 2018: emp growth at a rate equal to projected pop growth

Industry	2008	2009	2018	2020	2025	2030	2035	2040
Construction	642	390	656	700	798	892	1,005	1,125
Manufacturing	2,557	2,201	2,514	2,685	3,057	3,417	3,851	4,312
Wholesale Trade	97	73	106	113	129	144	162	181
Retail Trade	930	841	1,124	1,201	1,367	1,529	1,723	1,929
Transportation, Warehousing & Utilities	181	181	191	204	232	259	292	327
Information	54	45	56	60	68	76	86	96
Financial Activities	270	241	283	303	345	385	434	486
Professional & Business Services	437	321	474	507	577	645	727	814
Education & Health Services	2,766	3,285	3,147	3,361	3,827	4,278	4,821	5,398
Leisure & Hospitality	1,002	1,018	1,361	1,454	1,655	1,850	2,085	2,335
Other Services	413	409	434	463	528	590	665	744
Government	183	175	192	205	233	261	294	329
Total	**9,533**	**9,180**	**10,536**	**11,255**	**12,815**	**14,325**	**16,145**	**18,077**
Cumulative from 2009		-	1,357	2,075	3,636	5,145	6,965	8,897

SIAMP as a "Special Opportunity"

- SIAMP is a good first start to analysis and future planning that will enable the City to meet Goal 9 requirements:

  "...provide for at least an adequate supply of sites of suitable sizes, types, locations, and service levels for a variety of industrial and commercial uses..."

- South Industrial Area is *an* area that has the characteristics that employers will need
- City will undergo further review of all potential industrial areas as part of an industrial UGB amendment (to determine if it is *the* area)

Environmental Protection

- Statewide planning goals do inherent environmental protection through land use regulations
- UGB system preserves urbanizable land for the future – compels cities to provide adequate land for future uses
- UGB also:
  - Preserves farm & forest land outside UGB
  - Less congestion & pollution by commuters if adequate land for jobs provided by cities
  - Creates distinct separation between urban & rural uses

Lack of Existing Industrial Sites as a "Disadvantage"

- Newberg lacks an adequate supply of suitable industrial land – this is a disadvantage for existing businesses to expand & new businesses to locate here

- There are existing vacant industrial sites that are primarily considered as expansion or development sites for their current owners – this is not a disadvantage, however, it does contribute to Newberg's lack of "available" land

"Inconsistencies" in Targeted Industries

- Some industries listed as business types – i.e. "sports apparel/recreation-related products" in one table (12-15: Newberg Targeted Industries)
- Similar names used for manufacturing uses – i.e. "sports and recreational campus" – by site size range (12-16: Site Size Ranges...)
- Several business types may be located under one manufacturing use – several sports product manufacturers could be located on one "sports campus", particularly according to M-4 rules

Health Care as a Targeted Industry

- Health care is one of Newberg's four targeted industries
- Health care is not more discussed throughout EOA because it primarily does not use industrially zoned land
- Health care uses are typically found on institutional or commercially zoned land (such as along Providence Drive)
- January 2010 EOA has been updated to include tables with office land data

Actual Businesses Looking for Development Sites

- Snapshots of businesses show they are looking for similar site characteristics as we have listed:
  - Proximity to transportation and public services
  - Compatibility with adjacent uses
  - Larger lot sizes
- Much of data confidential
- Hard to say what "would have been"
- An August 2009 purchase was 2+ acres, an October 2008 purchase was 12+ acres, and many of the prospective businesses looking for larger acreage sites
- Newberg would be largely unable to accommodate these requests with our current land supply

Urban Growth Boundary Amendment Process

- First, determine land need (based on coordinated 20-year population forecasts)
- Second, evaluate possible locations for expansion of the UGB
  - Based on land priorities specified by ORS and Goal 14
- UGB findings rely on the data within the EOA – including population and employment forecasts, land need and supply tables, and site suitability characteristics for land types

Report Timeline – 20 to 30 Years

- A lot of planning is to be prepared for the future – so we can shape what our community looks & feels like
- Not all going to happen tomorrow, or even soon
- To give some perspective…In 1990 (20 years ago):
  - The Simpsons began airing
  - The first web page was published
  - Operation "Desert Shield" began in Kuwait
  - Hubble telescope sent into space
  - Popular music: Vanilla Ice, Whitney Houston, Garth Brooks
  - Popular films: Home Alone, Ghost, Die Hard 2
  - President: George H.W. Bush
  - U.S. enters a major recession
  - Newberg population: 13,086

Comprehensive Plan Amendments

- Necessary as the Comprehensive Plan coordinates information with the EOA
- Updated population information & land need and supply information
- Add five new policies to Section H (The Economy):
  - Three policies regarding collaboration for the best utility, telecommunications, and transportation infrastructure possible (m, n, o)
  - p. The City shall strive to develop and promote a high quality of life in the community in order to attract and retain a diverse and highly skilled workforce.
  - q. The City shall foster an environment of business innovation so that the community may remain economically competitive.

Questions?

Any questions about the revised EOA or the Comprehensive Plan amendments?

Attachment 1

Note that this version is a comparative version between November 2009 and January 2010. Deletions are shown as ~~strikethrough~~ and insertions are shown as underline.

Economic Opportunities Analysis

Section 12 of Newberg Inventory of Natural and Cultural Resources

Originally Adopted by Newberg City Council January 3, 2006
by Ordinance No. 2006-2635
Proposed Revisions Draft ~~November 2009~~January 2010

City of Newberg
Economic Opportunities Analysis

Table of Contents

Table of Tables iii
Table of Figures iv
I. Introduction 1
II. Economic Trends Analysis 3
National, State and Regional Trends 3
Regional Economic Development Industry Clusters and Target Industries 9
Yamhill County Agri-Business 10
Regional Industrial Land Availability 13
Newberg Population Profile 14
Historic and Future Growth Trends 14
Age characteristics 15
Educational Attainment and Income 15
Commuting Patterns 18
Newberg Employment Characteristics 19
Historic Economy 19
Current Economy 20
Retail Conditions 24
III. Assessment of Community Economic Development Potential 25
Regional Employment Projections 25
Newberg Employment Projections 26
Newberg's Comparative Advantages and Disadvantages 27
Comparative Advantages 27
Comparative Disadvantages 29
Special Opportunities 31
Dental Equipment Cluster 31
Alternative Energies 31
South Industrial Area 31
Aviation Related Industry 33
Nursery and other Agricultural Products 33
Wine/Tourism Industry 34
Retail 35
IV. Newberg's Economic Development Strategy 36
Capitalizing on Comparative Advantages & Addressing Comparative Disadvantages 36
Regional Focus 37
Locally Targeted Economic Development Industry Clusters (Target Industries) 39
Comprehensive Plan Policies and Recommended Supportive Economic Development Actions 40
V. Industrial and Commercial Land Needs and Supply 42
Industrial Land Need 42
Industrial Employment Projections 42

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Field Code Changed
Field Code Changed
Field Code Changed
Formatted: TOC 2
Formatted: TOC 3
Formatted: TOC 3, Tab stops: 5.87", Right,Leader: ...
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Formatted: TOC 2, Tab stops: 5.87", Right,Leader: ... + Not at 0.33"
Formatted: TOC 1, Tab stops: Not at 5.87"
Formatted: TOC 2

Industrial Site Requirements 43
Industrial Land and Sites 49
2030 Industrial Site Need vs. Supply 52
Commercial Land Need 52
Commercial Land Need 52
Commercial Site Requirements 56
Commercial Land and Sites 57
2030 Commercial Site Need and Supply 58
VI. Conclusion 60

Formatted: TOC 3

Table of Tables

Table 12- 1: Yamhill County Value of Agricultural Production, 2007 11
Table 12- 2: Newberg Census Populations 14
Table 12- 3: Population Forecasts - Newberg Urban Area 15
Table 12- 4: Comparative Age Characteristics 15
Table 12- 5: Comparative Educational Attainment 16
Table 12- 6: Comparative Household Income 17
Table 12- 7: Comparative Median Household Income and Median Wages 17
Table 12- 8: Place of Work for Workers Living in Newberg 19
Table 12- 9: 2007 City of Newberg Annual Average Employment by Industry 21
Table 12- 10: Estimated Newberg Employment by Industry 2007-2009 22
Table 12- 11: Newberg Top Employers 2009 23
Table 12- ~~11~~12: Population and Retail Sales 24
~~Table 12- 12: Industrial Employment Projections ..... 25~~
Table 12- 13: Combined Employment Projection for Regions 2, 3, and 15, 2008-2018 25
Table 12- 14: Projected Newberg Employment through 2040 27
Table 12- 15: Strategies to Capitalize on Comparative Advantages 36
Table 12- ~~14~~16: Strategies to Address Comparative Disadvantages 37
Table 12- ~~15~~17: Newberg Targeted Industries 40
~~Table 12- 16:~~ Table 12- 18: Industrial Space Utilizing Employment Projection through 2040 43
Table 12- 19: Site Size Ranges by Targeted Industrial Cluster and Sector 45
Table 12- ~~17~~20: Targeted Industry Clusters and Sectors by Site Size Ranges and Existing Newberg Industrial Firm Examples 46
Table 12- ~~18~~21: Site Size Distribution by Firm Employment (2010-2030) 47
Table 12- ~~19~~22: Required Industrial Site Suitability Characteristics 48
Table 12- ~~20~~23: Buildable Industrial Land in Newberg UGB (2009) 50
Table 12- ~~21~~24: 2010-2030 Industrial Land Supply and Need 52
~~Table 12- 22: Commercial~~Table 12- 25: Office Space Utilizing Employment through 2040 53
Table 12- 26: Office Land ~~Need~~Needs through 2040 54
Table 12- 27: Retail Land Needs through 2040 55
Table 12- 28: Commercial Land Needs, 2010-2040 55
Table 12- ~~23~~29: Required Commercial Site Suitability Characteristics 57

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Table 12- ~~24~~30: Buildable Commercial Land in Newberg UGB (2009)..... 57
Table 12- ~~25~~31: Commercial Land Supply and Need 58

Field Code Changed

Field Code Changed

Table of Figures

~~Figure 12- 1: Comparative Median Household Income and Median Wage ..... 18~~
~~Figure 12- 2: Employed Workers over 16 by Industry ..... 20~~
~~Figure 12- 3: Projected Cumulative Employment Growth, 2005-2040..... 39~~
~~Figure 12- 4: Buildable Industrial Land, Newberg UGB 2009 ..... 47~~
~~Figure 12- 5: Commercial Areas and Buildable Commercial Land, Newberg UGB 2009 ..... 52~~

Figure 12- 1: Comparative Median Household Income and Median Wage 18
Figure 12- 2: Employed Workers over 16 by Industry 20
Figure 12- 3: Buildable Industrial Land, Newberg UGB 2009 51
Figure 12- 4: Commercial Areas and Buildable Commercial Land, Newberg UGB 2009 59

I. Introduction

Newberg's economy traditionally has been rural in nature. As the city with the second largest population in Yamhill County, Newberg serves as the commerce center for the eastern portion of the county's primarily agricultural economy. However, over the past couple of decades, Newberg has been making a slow transition to a city of more urban characteristics. Newberg's economic base has become more diversified, including some of its home-grown industries that have evolved into national and international leaders in their respective fields.

This trend toward urbanization is likely to continue as the growth of the Portland metropolitan area increasingly influences the character of Newberg. However, our city is one steeped in history, and is a community that possesses a strong sense of place. The citizens of Newberg highly value these characteristics and wish to maintain its unique identity. To do so, Newberg must strengthen its economic base. Newberg must support its existing businesses while nurturing new enterprises.

Newberg has identified four business clusters that are the foundation of its economy: manufacturing, health care, higher education, and the wine/tourism industry. Ensuring the vitality of these business clusters is key to the economic health of our community

Like most communities, Newberg's economic development efforts focus on two principal strategies:

1. Retention and Expansion of Existing Businesses. Newberg has been extremely fortunate in having strong commercial and industrial sectors. Newberg has an unwavering commitment to its existing businesses and industries. This commitment is underscored by the positive attitude of appointed and elected officials to meeting the needs of the business community – in terms of providing public facilities and services necessary for businesses to grow and prosper, and in listening to the business community in its long-range planning processes and regulatory review.

2. Recruitment of New Businesses. A substantial portion of Newberg's Economic Opportunities Analysis is devoted to attracting new traded-sector industrial and service-based industries that will bring new wealth to the community. To ensure that Newberg's economic development efforts are successful, we have carefully assessed economic trends and our comparative economic advantages and disadvantages, as required by Statewide Planning Goal 9 (Economy of the State).

   The City has worked closely with the Portland-Vancouver Regional Partners Council for Economic Development, the Oregon Business Development Department (OBDD), and the Department of Land Conservation and Development (DLCD) in defining the types of industry clusters that can be reasonably attracted to our community. Newberg also has determined the size and characteristics of sites required for Newberg to be competitive -- from a regional perspective -- in attracting our targeted businesses to the community.

Critical to Newberg's economic development efforts is the availability of developable land for

businesses, as redevelopment opportunities are limited. The City closely monitors the supply of these types of lands to ensure that opportunities for economic growth can be capitalized upon as they arise.

As for Newberg's targeted industrial clusters, most of these businesses require relatively flat sites, with a minimum of conflicting land uses (e.g., agricultural or residential areas), and close access to a major highway without travel through land with conflicting uses. Most will benefit tremendously by the construction of the Newberg-Dundee Bypass and its connection to Highway 219, which is planned in the Oregon Highway Plan.

The City also has considered the site characteristics required to attract targeted industrial clusters when considering Newberg relative to other Northwest communities. Newberg has identified four types of industrial development to focus on:

- Large site light industrial (individual sites reserved for single users);
- Airport light industrial (within the Sportsman Airpark Land Use Master Plan);
- Infill light industrial that takes advantage of remaining industrial sites within the existing UGB; and
- Master planned light industrial parks that provide a range of medium to small sites in a master planned setting.

The Oregon Business Development Department has made it very clear that providing large industrial sites for traded-sector employment opportunities in a master planned park setting with close access to Interstate 5 will put Newberg at a distinct advantage when compared with other Northwest communities.

Newberg has relatively little industrial land left within its UGB – and most of this land does not meet the site requirements of companies looking to expand and/or relocate to Newberg. After considering a range of alternatives both in and outside of the existing UGB, Newberg has concluded that the South Industrial Area best meets the site requirements of targeted industrial clusters. This area:

- Has large, flat "suitable" sites (i.e., meeting identified site requirements) with close access to Highway 219. The area has access within about 10 minutes to I-5, with no intervening urban areas. It has close access to the Highway 99W corridor, which will be further enhanced with construction of the Newberg-Dundee Bypass;
- Has natural buffers from adjacent agricultural and rural residential land that enhances the attractiveness of the area for traded-sector industrial use;
- Has immediate access to electrical, natural gas, sewer and water services;
- Is a natural extension of Newberg's existing light industrial and airport-related industrial areas.

Newberg's other primary existing business clusters (health care, higher education, wine/tourism) also must have opportunities for expansion if they are to remain vital. These businesses are usually located on lands zoned for commercial and/or institutional development.

Higher education institutions include George Fox University and Portland Community College. While the University currently owns sufficient land to satisfy its physical needs for the foreseeable future, much of that land is expected to be redeveloped to satisfy their programmatic needs. Portland Community College plans to build a branch campus in Newberg as a result of a bond measure that was passed in 2008. The College is nearing purchase of a site after an extended search yielded few opportunities for suitable sites.

The foundation of the local healthcare industry is Providence Newberg Medical Center, which is located at the east end of Newberg directly on Highway 99W. The hospital is located on land that will accommodate its expansion plans for the foreseeable future. Land to accommodate development of ancillary private medical services that would benefit from close proximity to the hospital is available.

The wine/tourism industry in Newberg is principally involved in the retail and service business sectors. Growing of the wine grapes and processing them into wine is done outside of Newberg's city limits. Further development of this industry will likely be accommodated through two mechanisms. First, Newberg's historical downtown buildings/land will continue to be reused and redeveloped for businesses of this industry, including direct sales of wine, restaurants, antiques, arts and crafts stores, etc. Second, the Springbrook Master Plan has a commercial node: one that is expected to include businesses that will cater to the needs of wine tourists. Moreover, this commercial node will be located next to the newly constructed Allison Inn and Spa, a high-end resort that targets wine tourists. Additional opportunities for manufacturing, processing, and storing wine could be made available if Newberg had adequate industrial land.

Finally, a community's economic development strategy must consist of more than ensuring the availability of an adequate land supply for future growth. The community also must commit to comprehensive set of actions that support local businesses. Included in this analysis is a list of recommended economic development actions that are intended to help Newberg assist its local economic partners.

II. Economic Trends Analysis

The EOA addresses local and regional trends (660-009-0015 (1)) on the following pages, concluding that Newberg's future employment growth will be dependent on regional economic clusters. The trends analysis results in identification of future industrial uses – the "Targeted Industrial Clusters" for Newberg.

National, State and Regional Trends

Economic development in Newberg over the next 20 years will occur in the context of long-run national trends.[1] The most important of these trends include:

- The aging of the baby boom generation, accompanied by increases in life expectancy. The number of people age 65 and older will more than double by 2050, while the number of

[1] National trends courtesy of ECONorthwest.

people under age 65 with grow only 22 percent. The economic effects of this demographic change include a slowing of the growth of the labor force, an increase in the demand for healthcare services, and an increase in the percent of the federal budget dedicated to Social Security and Medicare.[2]

Baby boomers are expecting to work longer than previous generations. An increasing proportion of people in their early to mid-50s expect to work full-time after age 65. In 2004, about 40% of these workers expect to work full-time after age 65, compared with about 30% in 1992.[3] This trend can be seen in Oregon, where the share of workers 65 years and older grew from 2% of the workforce in 1992 to 3% of the workforce in 2002, an increase of 64%. Over the same ten-year period, workers 45 to 64 years increased by 70%.[4]

- Tightening labor force. Growth in the labor force is projected to slow over the 2006-2016 period due to the aging and retirement of the baby boomer generation and because women's participation in the labor force has peaked. Job growth is expected to outpace population growth, with a 10% increase in employment (15.6 million jobs) compared to a 9% increase in civilian non-institutional population 16 years and older (22 million people).[5]
- Need for replacement workers. The need for workers to replace retiring baby boomers will outpace job growth. According to the Bureau of Labor Statistics, net replacement needs will be 33.4 million job openings over the 2006-2016 period, more than twice the growth in employment (15.6 million jobs). Management occupations and teachers will have the greatest need for replacement workers because these occupations have an older-than-average workforce.[6]
- Increases in labor productivity. Productivity, as measured by output per hour, increased over the 1995 to 2005 period. The largest increases in productivity occurred over the 1995 to 2000 period, led by industries that produced, sold, or intensively used information technology products. Productivity increased over the 2000 to 2005 period but at a slower rate than during the latter half of the 1990s. The sectors that experienced the largest productivity increases over the 2000 to 2005 period were: information, manufacturing, retail trade, and wholesale trade. Productivity in mining decreased over the five-year period. [7]
- Continued trend towards domestic outsourcing. Businesses continue to outsource work to less expensive markets. Outsourcing generally falls into two categories: (1) moving jobs from relatively expensive areas to less expensive areas within the U.S. and (2) moving jobs

[2] The Board of Trustees, Federal Old-Age and Survivors Insurance and Federal Disability Insurance Trust Funds, 2008, *The 2008 Annual Report of the Board of Trustees of the Federal Old-Age and Survivors Insurance and Federal Disability Insurance Trust Funds*, April 10, 2008.

[3] "The Health and Retirement Study," 2007, National Institute of Aging, National Institutes of Health, U.S. Department of Health and Human Services.

[4] "Growing Numbers of Older Workers in Oregon," Oregon Employment Department.

[5] Arlene Dohm and Lyn Shniper, "Occupational Employment Projections to 2016," *Monthly Labor Review*, November 2007, pp. 86-125.

[6] Arlene Dohm and Lyn Shniper, "Occupational Employment Projections to 2016," *Monthly Labor Review*, November 2007, pp. 86-125.

[7] Corey Holman, Bobbie Joyeaux, and Christopher Kask, "Labor Productivity trends since 2000, by sector and industry," Bureau of Labor Statistics *Monthly Labor Review*, February 2008.

outside of the U.S. to countries with lower labor costs. About three-quarters of layoffs in the U.S. between 1995 and 2004 were the result of domestic relocation, involving movement of work within the same company. The industries with the largest amounts of domestic outsourcing were: manufacturing, retail trade, and information.[8]

- Continued growth in global trade and the globalization of business activity. With increased global trade, both exports and imports rise. Faced with increasing domestic and international competition, firms will seek to reduce costs through implementing quality- and productivity-enhancing technologies, such as robotics or factory automation. In addition, production processes will continue to be outsourced offshore.[9]
- Continued shift of employment from manufacturing and resource-intensive industries to the service-oriented sectors of the economy. Increased worker productivity and the international outsourcing of routine tasks lead to declines in employment in the major goods-producing industries. Projections from the Bureau of Labor Statistics indicate that U.S. employment growth will continue to be strongest in healthcare and social assistance, professional and business services, and other service industries. Construction employment will also grow but manufacturing employment will decline.[10]
- The importance of high-quality natural resources. The relationship between natural resources and local economies has changed as the economy has shifted away from resource extraction. Increases in population and household income, combined with changes in tastes and preferences, have dramatically increased demands for outdoor recreation, scenic vistas, clean water, and other resource-related amenities. Such amenities contribute to a region's quality of life and play an important role in attracting both households and firms.[11]
- Continued westward and southward migration of the U.S. population. Although there are some exceptions at the state level, a 2006 U.S. Census report documents an ongoing pattern of interstate population movement from the Northeast and Midwest to the South and West.[12]
- The growing importance of education as a determinant of wages and household income. Level of education largely determines employment, which largely determines income level. Completion of a four-year college degree paves the way for a professional or managerial occupation in the information-based economy, which on average yields higher incomes than service jobs or menial labor. According to the Bureau of Labor Statistics, the majority of the

[8] Sharon P. Brown and Lewis B. Siegel, "Mass Layoff Data Indicate Outsourcing and Offshoring Work," *Monthly Labor Review*, August 2005, pp. 3-10.

[9] Eric B. Figueroa and Rose A. Woods, 2007, "Industry Output and Employment Projections to 2016," *Monthly Labor Review*, November 2007, pp. 53-85.

[10] Eric B. Figueroa and Rose A. Woods, 2007, "Industry Output and Employment Projections to 2016," *Monthly Labor Review*, November 2007, pp. 53-85.; Arlene Dohm and Lyn Shniper, "Occupational Employment Projections to 2016," *Monthly Labor Review*, November 2007, pp. 86-125.

[11] For a more thorough discussion of relevant research, *see*, for example, Power, T.M. and R.N. Barrett. 2001. *Post-Cowboy Economics: Pay and Prosperity in the New American West.* Island Press, and Kim, K.-K., D.W. Marcouiller, and S.C. Deller. 2005. "Natural Amenities and Rural Development: Understanding Spatial and Distributional Attributes." *Growth and Change* 36 (2): 273-297.

[12] Marc J. Perry, 2006, *Domestic Net Migration in the United States: 2000 to 2004*, Washington, DC, Current Population Reports, P25-1135, U.S. Census Bureau.

fastest growing occupations over the next decade will require an academic degree: computer software application engineers, elementary school teachers, and accountants and auditors. Service jobs, (e.g., retail sales person, food preparation workers, and home care aides) will account for about half of all jobs by 2016.[13]

- Continued increase in demand for energy. Despite short-term fluctuations, energy prices are forecast to remain at relatively high levels, as seen in the 2006 to 2008 period, likely increasing further over the 20-year planning period. Although energy sources are expected to diversify and the energy efficiency of automobiles, appliances, and production processes are projected to increase, energy demand is expected to increase over the 2008 to 2030 period due to increases in population and economic activity. [14]
- Impact of rising energy prices on commuting patterns. Energy prices may continue to be high (relative to historic energy prices) or continue to rise over the planning period[15] which may impact willingness to commute long distances. There is some indication that increases in fuel prices have resulted in decreased suburban housing demand which has resulted in decreased prices, especially in large urban areas (e.g., Los Angeles or Chicago) and suburbs far from the center city. If this pattern continues, the area in Oregon most likely to be most impacted is Portland, which has the largest area of urban and suburban development in the state.[16]
- Possible effect of rising transportation and fuel prices on globalization. Increases in globalization are related to the cost of transportation: When transportation is less expensive, companies move production to areas with lower labor costs. Oregon has benefited from this trend, with domestic outsourcing of call centers and other back office functions. In other cases, businesses in Oregon (and the nation) have "off-shored" employment to other countries, most frequently manufacturing jobs.

  Likewise, increases in either transportation or labor costs may impact globalization. When the wage gap between two areas is larger than the additional costs of transporting goods, companies are likely to shift operations to an area with lower labor costs. Conversely, when transportation costs increase, companies may have incentive to relocate to be closer to suppliers or consumers.
  This effect occurs incrementally over time and it is difficult to measure the impact in the short-term. If fuel prices and transportation costs decrease over the 20-year planning period, businesses may not make the decision to relocate (based on transportation costs) because the benefits of being closer to suppliers and markets may not exceed the costs of relocation.

[13] In 2006, the national median income was about $32,000. Workers with some college education earned slightly less than median, while workers with a bachelor's degree earned $45,000. Workers who only had a high school diploma earned $26,000 a year, while workers without a high school degree only earned $19,000 a year. Workers in Oregon experience the same patterns as the nation, however, notably, pay is generally lower in Oregon than the national average. (Source: "Growing Number of Older Workers in Oregon," Oregon Employment Department and American Community Survey, U.S. Census, 2006.)

[14] Energy Information Administration, 2008, *Annual Energy Outlook 2008 with Projections to 2030*, U.S. Department of Energy, DOE/EIA-0383(2008), April.

[15] Energy Information Administration, 2008, *Annual Energy Outlook 2008 with Projections to 2030*, U.S. Department of Energy, DOE/EIA-0383(2008), April

[16] Cortright, Joe. "Driven to the Brink: How the Gas Price Spike Popped the Housing Bubble and devalued the Suburbs," May 2008.

- Growing opportunities for "green" businesses. Businesses are increasingly concerned with "green" business opportunities and practices. These business practices are concerned with "the design, commercialization, and use of processes and products that are feasible and economical while reducing the generation of pollution at the source and minimizing the risk to human health and the environment."[17]

  Green business opportunities historically have been at the mercy of feasibility and economics; if a firm ignores feasibility and economics while trying to be green, the firm may not be able to afford to operate long enough to learn how to make green businesses feasible. However, growing popularity in "eco-friendly" products and green development has caused the green market to become cost-competitive with the conventional market. The three types of green business opportunities are products, processes, and education.

  - *Producing green products.* In general, green products consume fewer resources, and create less pollution, which in turn, is beneficial to human health. For example, hybrid vehicles (which use a mixture of power or fuel sources), use less gasoline to operate and add fewer pollutants to the air, while still providing the same transportation services as a traditional vehicle. Another example is bamboo fencing and lumber, which is considered a "rapidly renewable" material.[18] Unlike traditional building materials, rapidly renewable materials, by virtue of a more consistent harvesting cycle, may sustain a community over a longer period of time than the steady and eventual depletion of finite resources or the degradation of a productive ecosystem.[19]
  - *Providing education about green practices or products.* Green education is often closely related to producing green products and is often done by consultants or nonprofit organizations. One example of a company involved in green education is the U.S. Green Building Council, a 501(c)(3) non-profit, which provides third-party verification that a building or community was designed and built using strategies aimed at improving environmental performance (LEED certification), provides numerous education resources and commissions studies geared to advance the green building movement. Another example is a consulting firm that writes a green plan for a city or business.
  - *Using green business practices.* Green business practices are alternative methods of doing business that promote resource conservation, prevent or reduce pollution, or have other beneficial environmental effects. Examples of green business processes include: buying products locally to reduce shipping distance, recycling waste products (where possible), or maximizing the use of natural lighting to reduce use of electricity and light bulbs.

- Potential impacts of global climate change. There is growing support for but not a consensus about whether global climate change is occurring as a result of greenhouse gas emissions. There is a lot of uncertainty surrounding global climate change, including the pace of climate change and the ecological and economic impacts of climate changes. In the Pacific

[17] Urban Green Partnership at urbangreenpartnership.org

[18] Rapidly renewable materials are considered to be an agricultural product, both fiber and animal that takes 10 years or less to grow or raise, and to harvest in an ongoing and sustainable fashion. Bamboo is the fastest-growing plant on Earth.

[19] New Construction and Major Renovation LEED Reference Guide, Version 2.2, U.S. Green Building Council (September 2006).

Northwest, climate change may result in the following changes: (1) increase in average temperatures, (2) shift in the type of precipitation, with more winter precipitation falling as rain, (3) decrease in mountain snow-pack and earlier spring thaw and (4) increases in carbon dioxide in the air.[20] Assuming that global climate change is occurring and will continue to occur over the next 20 years, a few broad, potential economic impacts for the nation and Pacific Northwest include:[21]

- *Potential impact on agriculture and forestry*. Climate change may impact Oregon's agriculture through changes in: growing season, temperature ranges, and water availability.[22] Climate change may impact Oregon's forestry through increase in wildfires, decrease in the rate of tree growth, change in mix of tree species, and increases in disease and pests that damage trees.[23]
- *Potential impact on tourism and recreation*. Impacts on tourism and recreation may range from: (1) decreases in snow-based recreation if snow-pack in the Cascades decreases, (2) negative impacts to tourism along the Oregon Coast as a result of damage and beach erosion from rising sea levels,[24] (3) negative impacts on availability of water summer river recreation (e.g., river rafting or sports fishing) as a result of lower summer river flows, and (4) negative impacts on the availability of water for domestic and business uses.
- *Potential changes in government policies*. There is currently no substantial national public policy response to global climate change. States and regional associations of states are in the process of formulating policy responses to address climate change including: increasing renewable energy generation, selling agricultural carbon sequestration credits, and encouraging energy efficiency.[25] Without clear indications of future government policy, it is impossible to assess the impact of government policies on the environment and subsequently, the economy.

However, the impending issue of global climate change will also offer economic *opportunities*. The search for alternative energy sources may result in increased investment and employment in "green" energy sources, such as wind, solar, and bio-fuels. Firms in the Northwest are well positioned to lead efforts on climate change mitigation, which may result in export products, such as renewable technologies or green manufacturing. [26]

[20] "Economic Impacts of Climate Change on Forest Resources in Oregon: A Preliminary Analysis," Climate Leadership Initiative, Institute for Sustainable Environment, University of Oregon, May 2007.

[21] The issue of global climate change is complex and there is a substantial amount of uncertainty about climate change. This discussion is not intended to describe all potential impacts of climate change but to present a few ways that climate change may impact the economy of cities in Oregon and the Pacific Northwest.

[22] "The Economic Impacts of Climate Change in Oregon: A preliminary Assessment," Climate Leadership Initiative, Institute for Sustainable Environment, University of Oregon, October 2005.

[23] "Economic Impacts of Climate Change on Forest Resources in Oregon: A Preliminary Analysis," Climate Leadership Initiative, Institute for Sustainable Environment, University of Oregon, May 2007.

[24] "The Economic Impacts of Climate Change in Oregon: A preliminary Assessment," Climate Leadership Initiative, Institute for Sustainable Environment, University of Oregon, October 2005.

[25] Pew Center on Global Climate Change website: http://www.pewclimate.org/what_s_being_done/in_the_states/

[26] "The Economic Impacts of Climate Change in Oregon: A preliminary Assessment," Climate Leadership Initiative,

Short-term national trends will also affect economic growth in the region, but these trends are difficult to predict. At times these trends may run counter to the long-term trends described above. A recent example is the downturn in economic activity in 2007 following declines in the housing market and the mortgage banking crisis. The result of the economic downturn has been a decrease in employment related to the housing market, such as construction and real estate. Employment in these industries will recover as the housing market recovers and will continue to play a significant role in the national, state, and local economy over the long run. This report takes a long-run perspective on economic conditions (as the Goal 9 requirements intend) and does not attempt to predict the impacts of short-run national business cycles on employment or economic activity.

The national trends discussed above inform many of the emerging and targeted industry clusters identified in this EOA. They also underscore the importance of concentrating traded-sector industries in Newberg to reduce energy consumption and reliance on commuting. It's important to note that, despite national trends, Newberg has maintained a relatively high percentage of manufacturing jobs within the community and supports continuing to do so.

Regional Economic Development Industry Clusters and Target Industries

Industry clusters of a region are its principal economic drivers. The Portland Regional Business Plan identifies specific, traded-sector industry clusters that should be supported to enhance the economic base of the region. The Plan defines a cluster as follows:

> *A cluster is a group of firms that, though their interactions with each other and with their customers and suppliers, develop innovative, cutting-edge products and processes that distinguish them in the market place and from firms in the same industry found elsewhere. The competitiveness of an industry cluster is determined by the presence of highly specialized pools of skills, technology and infrastructure tailored to the needs of the cluster firms. The presence of sophisticated and demanding customers in a cluster pressures firms to innovate on a continuing basis....*
>
> *Those industry clusters that compete nationally and internationally are the core of this region's economy and what distinguishes it from other regions. The industry cluster that exist and that are emerging in the metropolitan area are built on the distinctive knowledge competencies of the region, and the strengths that currently enable the region to compete globally for economic activity and investment. Additionally, industries that sell their products and services nationally and internationally have greater long-term growth potential since their opportunities for growth are not constrained by the size of this region's market. For these reasons, focusing on industry clusters is both a more efficient and effective use of this region's efforts and resources.*

The Plan identifies the following industry clusters that the Portland region should focus on in their economic development efforts. Because of Newberg's proximity to the region, Newberg also has good likelihood of attracting these industries, and also should focus on attracting them.

Institute for Sustainable Environment, University of Oregon, October 2005.

These include:

1. Established
   a. High Tech (Semiconductors/Silicon, Imaging & Display Technology)
   b. Metals, Machinery, Transportation Equipment
   c. Nursery Products
   d. Specialty Foods and Food Processing
   e. Lumber and Wood Products

2. Emerging
   a. High Tech (Nano & Micro Technology, Cyber-Security, Health/Medical Information Technology)
   b. Creative Services (Advertising, Public Relations, Film and Video, Web/Internet Content and Design)
   c. Sports Apparel/Recreation-Related Products

3. Targeted (clusters desired to create and establish)
   a. Biotech/Bioscience (Medical Devices, Bioinfomatics, Pharmaceuticals, Genomics, Anti-Virals)
   b. Sustainable Industries (Renewable Energy, Resource Efficiency Technologies, Sustainable Building Materials, Green Chemistry)
   c. Professional Services (Architecture, Engineering, Legal and Financial Services, etc.)
   d. Distribution & Logistics

Newberg should provide opportunities for these industries to expand and locate within the Newberg UGB over the 20-year planning period. In addition, doing business in Newberg (e.g. real estate costs) can often be significantly lower than much of the Portland metro area. Our community offers a unique quality of life compared to others in the region, one that will attract those who believe their business will benefit from being located here. If Newberg provides suitable sites for these industry clusters, there is a reasonable likelihood that they will choose our community.

Yamhill County Agri-Business

In June 2009, Barney & Worth, Inc. prepared the *Yamhill County Agri-Business Economic and Community Development Plan: Summary Report* for Yamhill County. The plan assessed the existing state of agriculture and agri-tourism in the County, and assessed future opportunities for growth. According to the report, Nursery and Greenhouse Crops comprise 45.2% of the value of agricultural production in the county.

Table 12- 1: Yamhill County Value of Agricultural Production, 2007

Yamhill County Value of Agricultural Production, 2007	Value ($000)	Percent of Total
All Crops		
Nursery & Greenhouse Crops	$133,724	45.2%
Grass & Legume Seeds	$56,889	19.2%
Nuts & Tree Fruit	$24,684	8.3%
Small Woodlots and Christmas Trees	$13,204	4.5%
Grain & Hay	$9,600	3.2%
Vegetable & Truck Crops	$3,185	1.1%
Other Crops (Wine Grapes)	$13,387	4.5%
Sub total	$254,673	86.0%
All Livestock		
Dairy Products	$20,482	6.9%
Poultry	$9,780	3.3%
Cattle	$6,267	2.1%
Other Animal Products	$4,903	1.7%
Sub total	$41,432	14.0%
All Crops and Livestock	**$296,105**	

Source: Oregon Agricultural Information Network.

The report also recognizes great opportunities in the agri-tourism sectors. Key findings from the report include:

> *For 150 years and longer, Yamhill County has benefitted from its strong agricultural base. Even now, the agriculture sector produces $300 million in annual sales (not including food processing and wine). The great strength of Yamhill County agriculture is its diversity. Local agricultural production remains strong in many profitable sub-sectors, with fast growing horticulture accounting for nearly half of total sales. The future for Yamhill County agriculture looks bright.*
>
> *Alongside horticulture and traditional crops, the Yamhill County wine industry has emerged over the past 30 years to become headline news nationally and internationally. Yamhill's name – like Napa, Sonoma, Bordeaux and Burgundy – has become synonymous with its wine. With the wine sector continuing to flourish, new wineries opening each year, more acres planted with grapes, this trend will also be sustained in Yamhill County.*
>
> *Coupled with the area's scenic beauty (thanks in part to agriculture!), the wineries assure that Yamhill County will continue to host many visitors. Estimates already place that number at 1.5 million per year who visit local wineries. Half of those visitors come from the Portland area, and the other half are from the western states and all over the U.S. and world.*
>
> . . .

> *Yamhill County – with its solid agricultural base, wine destination status, proximity to the metro area, and stunning beauty – also appears to be on the verge of something great. With the opening of the Allison resort in Newberg, along with other new attractions, there's an opportunity just now to pick priorities and adopt strategies that move the community forward*[27].

The plan identifies a number of key ingredients to secure the future for Yamhill County's agriculture and tourism sectors:

> Shared vision for Yamhill County's future. *Yamhill County communities and citizens need to reach agreement on values and priorities for the future. Tourism is here to stay – now is the critical time to plan, safeguarding quality of life for local residents and maximizing the potential for community benefits.*
>
> More lodging facilities. *To capture the economic benefits of the estimated 1.5 million annual visitors to wine country, Yamhill County must have more high amenity overnight accommodations.*
>
> More attractions. *Wineries and hotels alone aren't enough to hold every visitor's attention and assure repeat visits. Wine tourism is seasonal and cyclical, and other destinations and attractions will be needed to complement Yamhill County wine country and fill out the tourism calendar: arts and culture, entertainment, historic sites, parks and trails, golf, outdoor adventures, shopping.*
>
> Rezoning to accommodate prototype development projects. *Analysis has revealed the types of representative projects needed to support agriculture and tourism lack adequate sites. Rezoning enables communities to place these projects where they "fit" and provide benefits to the community.*
>
> Site assembly. *Preparing land for development, from initial site selection through planning and marketing, is site assembly. To assure job growth and allow for new investment, communities will need to be proactive in identifying an adequate supply of properly sized, suitably zoned development sites and be active participants in the development process.*
>
> County-wide infrastructure strategy. *The most pressing problem for every community is infrastructure. Regional cooperation in Yamhill County to jointly plan for the future and secure adequate drinking water supplies can be a model for cost saving inter-agency arrangements for other services. Moving ahead with a reprisal solution for drinking water is critical for many Yamhill County communities.*

[27] *Yamhill County Agri-Business Economic and Community Development Plan: Summary Report* Prepared for: Yamhill County, Oregon, Barney & Worth, Inc., in association with Globalwise, Inc., E.D. Hovee & Company, LLC, and Spencer & Kupper, page 41.

> Coordinate opportunity sites / services. *The shortage of suitable development sites and scarcity of funds require strategic thinking. Which key sites and development opportunities must have adequate services available?*[28]

Regional Industrial Land Availability

In 2001, OTAK prepared the *Regional Industrial Land Study for the Portland – Vancouver Metropolitan Area.* This report inventoried the available industrial land in the area. That report concluded that the region would have a need for 6,900 acres of buildable industrial land for the period 2000-2025 [29]. The study found that, while the region had enough land, most of it suffered from development constraints and lack of services. The report found that the region had only 2,387 acres of ready-to-develop unconstrained land, only about 1/3 of the projected need.

Recognizing the severe shortage of industrial land in the region and the state, in 2003 Governor Kulongoski ordered the Community Solutions Team to help establish certified shovel ready industrial sites, and appointed the Industrial Lands Taskforce. In its report,

> *The Taskforce concluded that there is a significant lack of certain types of project ready industrial land in certain parts of the state. This conclusion is supported by the findings of the Portland-area Regional Industrial Lands Study (RILS), the HB3557 committee report, testimony received at Taskforce hearings, and the direct experience of Taskforce members. The Taskforce also concluded that the many jurisdictions lack a 20-year supply of industrial land.*[30]

In addition:

> *Although the committee selected the following five highly marketable sites, the industrial land supply in the METRO region remains critically low. Identifying these five sites is only a first step.* ***More industrial sites, especially those that could accommodate a large employer, are needed****.*[31] [Emphasis added]

The report also discussed the lack of large industrial sites in appropriate locations:

> *<u>Unavailable Land in Strategically Significant Employment Areas</u>*
> *Given the Portland metropolitan area's economic significance to the state, the committee expressed concern that the selection pool of 55 sites forwarded to them from OECDD's Regional Development Officers (RDOs) included very few large industrial sites along I–5, between the Washington border and Salem. This occurred because there is a lack of land available for industrial development in this area. Land located at existing freeway interchanges, such as the Stafford District at I–205 and Stafford Road, Langdon Farms*

[28] Barney & Worth, Inc., page 43.
[29] *Phase 3: Regional Industrial Land Study for the Portland – Vancouver Metropolitan Area* prepared by Otak, Inc., in association with ECONorthwest and Parametrix, October 31, 2001
[30] *Positioning Oregon for Prosperity,* Report to Governor Kulongoski, prepared by the Industrial Lands Taskforce, September 2003
[31] *Industrial Lands Advisory Committee Report,* December 15, 2003

at the I–5 and Charbonneau exit, and the I–5 Donald/Aurora exit are logical market driven locations for large scale industrial and employment intensive development. [32]

While some efforts in the region have been made since that time to address this significant lack of industrial land in the region, the shortfall remains high and the needs have grown.

Newberg Population Profile

Historic and Future Growth Trends

Newberg has grown steadily through the last few decades. Table 12-1 shows the population growth over time since 1960.

Table 12- 2: Newberg Census Populations

Year	Population
1960	4,204
1970	6,507
1980	10,394
1990	13,086
2000	18,064

Source: U.S. Census Bureau

Newberg's population as of July 1, 2009 was estimated to be 23,150[33]. As of July 1, 2009, the Urban Growth Boundary has an estimated population of 23,582[34].

Between 1990 and 2000, Newberg's growth rate was 38%. In comparison, Newberg's growth rate was greater than the Portland Metropolitan area's at 27%, the state of Oregon at 20%, and Yamhill County's at 30%[35]. It should be noted that Yamhill County, where Newberg is located, is part of the Portland Metropolitan Statistical Area (PMSA). While Oregon's population in general is not expected to grow in the foreseeable future as fast as in the 1990s, the Portland metropolitan area should grow faster than the state as a whole.

In 2004, the Newberg City Council appointed an ad hoc advisory committee to look at the community's future land needs. To accomplish this task, the Ad Hoc Committee for Newberg's Future needed to forecast the community's future population. A consultant working with the Committee developed three growth forecast scenarios for the Committee to consider: low, medium, and high. The Committee selected the medium growth scenario as the most likely to occur. These population projections have been adopted into the Comprehensive Plan[36], coordinated with Yamhill County as required by ORS 195.036, and acknowledged by the State. The following table shows the forecasted future growth for Newberg:

[32] *Industrial Lands Advisory Committee Report*, December 15, 2003
[33] Population Research Center, Portland State University
[34] Newberg Planning Division
[35] U.S. Census Bureau
[36] Adopted by Ordinance 2005-2626, November 21, 2005

Table 12- 3: Population Forecasts - Newberg Urban Area[37]

Year	2000	2005	2010	2025	2030	2040
Forecasted Population	18,438	21,132	24,497	38,352	42,870	54,097

Source: Newberg Comprehensive Plan

Through 2008, these projections have been remarkably accurate. The 2008 PSU estimates are within 11 persons of the population estimates made in the comprehensive plan. The 2009 estimates are still within about 200 people of the projections, thus the adopted population forecasts can still be considered reliable.

Age characteristics

Table 12- 4 below compares Newberg's population by age categories with the populations of Yamhill County, the Portland Metropolitan Statistical Area (PMSA), and the state of Oregon. The table also compares the median age for each geographical area.

Table 12- 4: Comparative Age Characteristics

Age Categories	Newberg	Yamhill County	PMSA	Oregon
Under 5 years	7.6%	6.4%	6.7%	6.3%
5 to 9 years	3.5%	5.4%	6.9%	6.4%
10 to 14 years	8.9%	8.0%	6.7%	6.4%
15 to 19 years	9.7%	7.9%	6.5%	6.7%
20 to 24 years	12.1%	8.4%	6.0%	6.6%
25 to 34 years	13.0%	13.9%	14.9%	13.9%
35 to 44 years	15.4%	13.4%	15.3%	13.9%
45 to 54 years	11.9%	14.4%	15.4%	15.1%
55 to 59 years	5.7%	6.4%	6.7%	6.9%
60 to 64 years	2.4%	3.9%	4.5%	4.9%
65 to 74 years	4.4%	5.6%	5.3%	6.5%
75 to 84 years	3.5%	4.2%	3.5%	4.5%
85 years and over	2.0%	1.9%	1.6%	1.9%
Median age (years)	30.6	34.9	36.3	37.6

Source: U.S. Census Bureau, 2005-2007 American Community Survey 3-Year Estimates

The data shows that Newberg's population is younger that the comparative populations, especially in the 20 to 24 year old category. This is likely due to the presence of students attending George Fox University. In general, our population over 45 years of age is somewhat lower than the comparative populations.

Educational Attainment and Income

Table 12- 5 below compares the educational attainment of the Newberg population over 25 years of age compared with Yamhill County, the PMSA, and the state of Oregon. Newberg has approximately the same amount of residents with high school diplomas as the comparative areas; however, there are fewer residents with a Bachelor's degree or higher when compared to the

[37] Population forecasts are for the Newberg Urban Growth Boundary.

PMSA and the state. This may indicate that, although Newberg has a strong workforce in many areas, it does not have as many of the highly skilled professional jobs available that would require a Bachelor's degree.

Table 12- 5: Comparative Educational Attainment

	Newberg	Yamhill County	PMSA	Oregon
Less than 9th grade	3.9%	7.0%	4.1%	4.6%
9th to 12th grade, no diploma	7.4%	8.2%	6.7%	7.9%
High school graduate (includes equivalency)	27.9%	31.8%	24.4%	26.9%
Some college, no degree	29.2%	24.3%	25.2%	25.3%
Associate's degree	7.2%	6.6%	7.7%	7.7%
Bachelor's degree	15.2%	13.8%	20.6%	17.6%
Graduate or Professional degree	9.1%	8.2%	11.3%	10.0%
Percent High School Graduate or Higher	89%	85%	89%	88%
Percent Bachelor's Degree or Higher	24%	22%	32%	28%

Source: U.S. Census Bureau, 2005-2007 American Community Survey 3-Year Estimates

Table 12- 6 compares the household income levels of the Newberg population over 25 years of age compared with the state of Oregon, Yamhill County and the PMSA. Newberg has a high percentage of households in both the $35,000 to $49,999 and the $50,000 to $74,999 income ranges. As seen below in Figure 12-2, Newberg has high employment in the areas of construction, retail, manufacturing, and educational services; industries whose pay would typically fall into these ranges.

Table 12- 6: Comparative Household Income

	Newberg		Yamhill County		PMSA		Oregon	
Household Income*	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than $10,000	483	7.1%	2,378	7.2%	52,888	6.5%	108,551	7.5%
$10,000 to $14,999	552	8.1%	2,142	6.5%	39,721	4.9%	87,317	6.0%
$15,000 to $24,999	513	7.5%	3,189	9.7%	79,348	9.7%	168,261	11.6%
$25,000 to $34,999	819	12.0%	3,748	11.4%	85,031	10.4%	169,167	11.7%
$35,000 to $49,999	1,469	21.5%	5,462	16.6%	119,523	14.6%	225,677	15.6%
$50,000 to $74,999	1,430	20.9%	6,668	20.3%	166,437	20.3%	287,225	19.8%
$75,000 to $99,999	1,087	15.9%	4,480	13.6%	108,932	13.3%	174,531	12.1%
$100,000 to $149,999	363	5.3%	3,257	9.9%	103,824	12.7%	145,655	10.1%
$150,000 to $199,999	101	1.5%	772	2.4%	32,632	4.0%	42,738	3.0%
$200,000 or more	20	0.3%	737	2.2%	29,570	3.6%	38,287	2.6%

* In 2007 Inflation Adjusted Dollars
Source: U.S. Census Bureau, 2005-2007 American Community Survey 3-Year Estimates

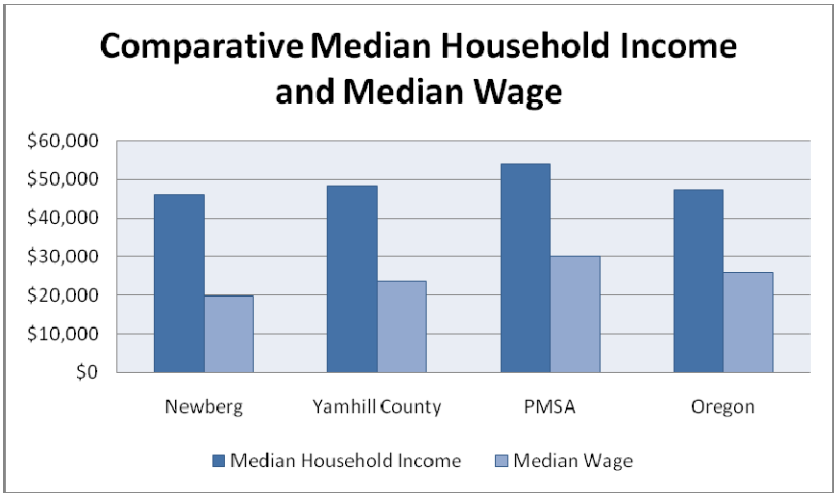
Table 12- 7 compares the median household income and median wages for Newberg, Yamhill County, the PMSA, and the state of Oregon. Figure 12- 1graphically shows that Newberg is behind Yamhill County and the PMSA in median household income and median wage.

Table 12- 7: Comparative Median Household Income and Median Wages

	Newberg	Yamhill County	PMSA	Oregon
Median Household Income	$46,066	$48,485	$53,935	$47,385
Median Wage	$19,821	$23,848	$30,094	$26,002
Male, Full-Time, Year-Round	$44,205	$41,148	$47,803	$42,676
Female, Full-Time, Year-Round	$29,063	$31,680	$36,563	$33,017

Source: U.S. Census Bureau, 2005-2007 American Community Survey 3-Year Estimates

Figure 12- 1: Comparative Median Household Income and Median Wage



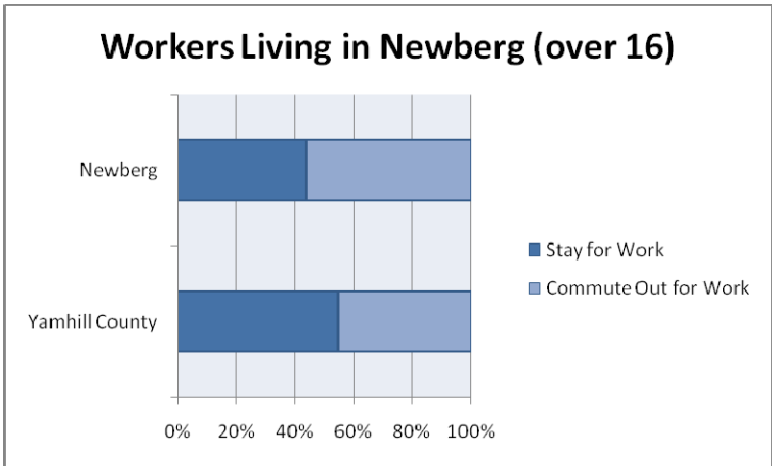
Source: U.S. Census Bureau, 2005-2007 American Community Survey 3-Year Estimates

Comparing the previous education and income tables reveals a very interesting profile of the Newberg community. The Newberg population has a smaller percentage of 4-year college and graduate degrees than the state or the PMSA; however, Newberg is also home to George Fox University. This indicates that George Fox University graduates are not remaining in Newberg, whether by choice or by other factors such as limited available job opportunities. Newberg also has a lower median household income and median wage than Yamhill County, the PMSA and the state. This may be related to the fact that Newberg has fewer citizens with higher education. As shown in Figure 12-2 on page 12-20, Newberg has a high percentage of workers in educational services and manufacturing jobs, both historically lower-paying professions (with the exception of highly skilled manufacturing jobs).

Commuting Patterns

The 2006-2008 American Community Survey 3-Year Estimates indicate that approximately 56% of workers over age 16 that live in Newberg travel outside of Newberg for work. Of those people that commute outside of Newberg for work, approximately 55% of workers stay in Yamhill County and approximately 45% of workers commute to other counties. The data indicates that the mean travel time for a worker leaving Newberg for work is 21 minutes. Given Newberg's relatively close proximity to the Portland metropolitan area, it is reasonable to assume that many of the workers leaving Newberg for work are going to one of the nearby Portland suburbs (which are located in Washington, Multnomah and Clackamas Counties). The following table shows this commuting pattern.

Table 12- 8: Place of Work for Workers Living in Newberg



Source: 2006-2008 American Community Survey 3-Year Estimates

The Oregon Employment Department has statistics regarding commuting patterns within Yamhill County. Of all the workers that live in Yamhill County, approximately 12% work in Newberg. Approximately 31% of all workers that live in Yamhill County commute to the nearby Portland metropolitan area counties (Washington, Multnomah and Clackamas Counties); a statistic that is similar to the number of Newberg workers commuting out to these counties. The Newberg number is likely higher due to its proximity to these neighboring counties relative to the rest of the Yamhill County population.

Reasons for these commuting patterns are likely to be manifold, and may include:

- Lower housing costs in Newberg compared to the Portland area.
- More employment opportunities in the Portland area.
- Desire to live in a community like Newberg with a high quality of life and sense of community, rather than a "same as everywhere else" type of Portland area suburb.

Newberg would like to provide more local employment opportunities, thus reducing travel time and distance for existing and future residents. In short, Newberg would like to reverse trends towards "bedroom community" status by providing a greater variety of local employment opportunities. To achieve this objective, Newberg must provide industrial sites with characteristics that capitalize on Newberg's comparative economic advantages.

Newberg Employment Characteristics

Historic Economy

Settlement of our region by people of European ancestry began a mostly agricultural economy for the area. As the region developed, Newberg slowly became the commercial center for the eastern end of Yamhill County and it remains so to this day. Evidence of this development is

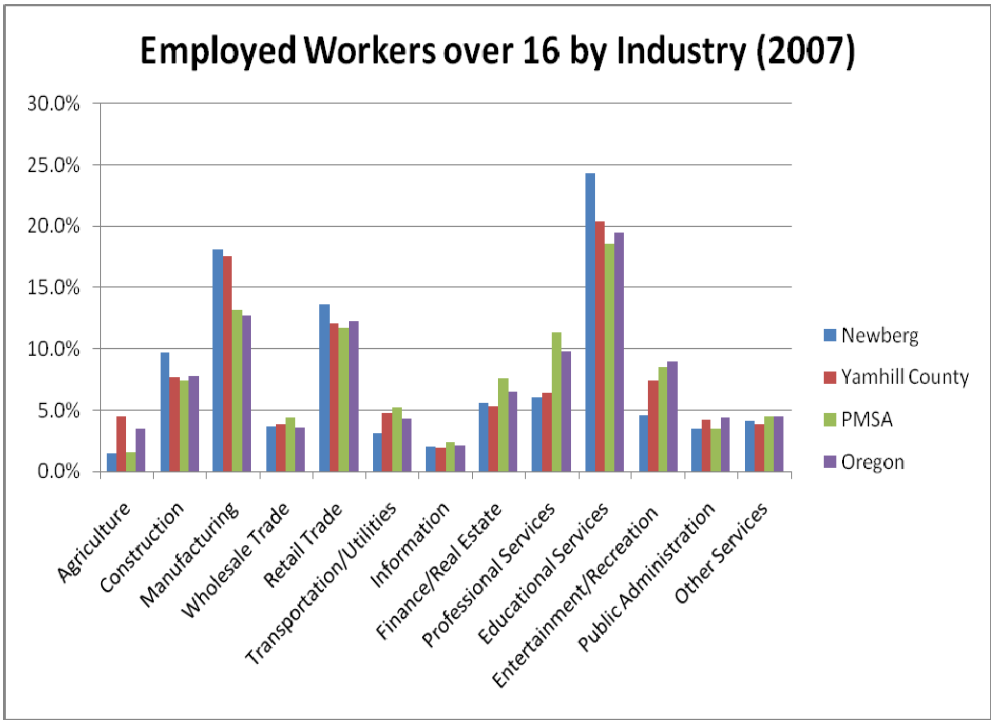
expressed through Newberg's Central Business District, which consists of many early twentieth century buildings constructed in a high-density pattern.

The advent of the car as a primary mode of transportation for people brought about commercial development pattern of a lower density. Most of this type of development is situated along Highway 99W in the eastern section of the city.

Current Economy

Newberg has a diverse economic base. This diversity, along with the types of businesses, has provided Newberg with a reasonably stable economy. Figure 12-2 shows how Newberg compares with Yamhill County, the PMSA and the state for percentage of workers by industry. As the chart shows, Newberg has a high percentage of workers in construction, manufacturing, retail trade, and educational services.

Figure 12- 2: Employed Workers over 16 by Industry



Source: U.S. Census Bureau, 2005-2007 American Community Survey 3-Year Estimates

Table 12-9 shows the actual employment by industry for Newberg in 2007, as reported by the Oregon Employment Department.

Table 12- 9: 2007 City of Newberg Annual Average Employment by Industry

Industry	Average Annual Employment	Total Payroll	Average Annual Wage
Agriculture, Forestry, Fishing and Hunting	142	$4,351,630	$30,645
Construction	773	$31,068,987	$40,193
Manufacturing	2,608	$135,015,712	$51,770
Wholesale Trade	103	$4,869,681	$47,278
Retail Trade	933	$25,761,682	$27,612
Transportation & Warehousing	167	$4,809,037	$28,797
Information	57	$2,148,418	$37,692
Finance & Insurance	169	$7,637,067	$45,190
Real Estate, Rental & Leasing	110	$2,693,296	$24,485
Professional, Scientific & Technical Services	199	$8,025,799	$40,331
Administrative Support, Waste Management, Remediation	207	$4,862,935	$23,492
Education Services	1,349	$45,973,472	$34,080
Health Care & Social Assistance	1,304	$45,422,729	$34,833
Arts, Entertainment & Recreation	148	$2,012,923	$13,601
Accommodation & Food Services	796	$10,227,414	$12,849
Other Services	397	$7,773,184	$19,580

Source: Oregon Employment Department

While employment data is readily available at the County level, specific employment data at the city level is less available, and has some limitations. The most recent data available for Newberg at the end of 2009 was 2007 data. Certain data is confidential and cannot be reported at the city level, including utility, management, and local government numbers. However, more recent data for Newberg can be derived by using certain data assumptions to estimate employment by industry through 2009[38]. Table 12- 10 below shows the estimated Newberg employment by industry for 2007-2009.

Table 12- 10: Estimated Newberg Employment by Industry 2007-2009

Industry	2007	2008	2009
Construction	773	642	390
Manufacturing	2,608	2,557	2,201
Wholesale Trade	103	97	73
Retail Trade	933	930	841
Transportation, Warehousing & Utilities	178	181	181
Information	57	54	45
Financial Activities	279	270	241
Professional & Business Services	430	407	299
Education & Health Services	2,653	2,766	3,285
Leisure & Hospitality	944	1,002	1,018
Other Services	397	413	409
Government	170	174	183
Total	**9,169**	**9,494**	**9,165**

Source: Oregon Employment Department, 2009, Newberg Planning Division

[38] The 2007-2009 employment data was derived using the following assumptions:

- Utility employment was derived as being 6.6% of the total "Transportation, Warehousing, & Utility" employment in Newberg. This is equal to the ratio in Region 15, the only region of the three surrounding regions (Region 2, Region 3, and Region 15) where data was available.
- Government employment was derived as the total FTE for the City of Newberg for that year, plus 5% for some County, State or other government jobs in Newberg.
- Management employment was derived as being 11.9% of the total Professional and Business Service employment in Newberg. This is equal to the ratio in Yamhill County, 2008.
- 2008 and 2009 employment estimates were derived by applying the same rate of change to each industry as in Yamhill County for those years.

The following is a list of the top employers located within the urban growth boundary of Newberg in 2009.

Table 12- 11: Newberg Top Employers 2009

Employer	Average Employment	Product Description	Industry Cluster
A-dec	978	Dental equipment	Manufacturing
George Fox University	560	Higher Education	Higher Education
Newberg Public Schools	560	K-12 Education	Education
SP Newsprint Company	324	Newsprint	Manufacturing
Providence Newberg Medical Center	255	Health Care	Health Care
Suntron[39]	220	Electronics (circuit boards, modular parts, cable assembly)	Manufacturing
Fred Meyer, Inc.	210	Groceries, retail	Retail
City of Newberg	181	Government	Government
The Allison Inn and Spa	165	Hotel and spa	Wine/Tourism
Friendsview Retirement Center	149	Continuing care retirement community	Health Care
~~FMC Food Tech~~PPM Technologies	109	Food processing machinery	Manufacturing
Hazelden Springbrook	100	Alcohol and drug treatment	Health Care
Climax Portable Machine Tools	95	Portable machine tools	Manufacturing
Safeway	80	Groceries, pharmacy	Retail
Harris Thermal Transfer Products	73	Heat exchanger manufacturing	Manufacturing
Chehalem Youth & Family Services	73	Child and family services	Health Care
Dental Components, Inc.	60	Dental equipment	Manufacturing
Ushio Oregon, Inc.	53	High intensity lamps	Manufacturing
A.R.E. Manufacturing	51	Dental equipment and boat parts	Manufacturing

Source: Chehalem Valley Chamber of Commerce; Reuters

Newberg has a higher than average manufacturing employment base. The list of companies in the table above shows that many of the community's businesses are industrial in nature. Education (e.g. George Fox University) and health care (e.g. Providence Newberg Hospital) are also big components of Newberg's economic structure. With the addition of the Allison Inn & Spa, the wine industry is beginning to make a larger impact, along with the associated tourism

[39] Suntron announced plans to close Newberg operations in 2010.

industry: bed and breakfasts, restaurants, art shops, wine-tasting rooms.

Retail Conditions

Newberg's close proximity to the Portland metro area and relatively low retail opportunities results in retail dollar "leakage" from the community. This means that fewer retail dollars stay in the community and continue to circulate within the local population. Support for this assertion of retail dollar leakage can be demonstrated through some simple calculations. By taking the total annual retail sales numbers of area, divided by the area's population, one gets a total annual retail spending per capita in that community. Using this formula, the following is a list of the annual retail sales per capita in population centers within Oregon.

Table 12- 12: Population and Retail Sales

Population Center	Annual retail sales per capita
Newberg	$9,462
McMinnville	$11,798
Ashland	$7,495
Medford	$21,470
Washington County	$12,386
Salem	$13,807
Bend	$22,933
Pendleton	$12,515
Eugene/Springfield	$14,132
Oregon	$10,542

Source: U.S. Census Bureau, 2000

Newberg's local retail spending is the below the state average. McMinnville's retail spending is higher than Newberg, but also has more shopping opportunities. Ashland and Medford's relationship is much like Newberg with the Portland metro area, with many Ashland retail dollars likely to be going to Medford businesses. Many other commercial centers around Oregon, like Salem, Bend, Pendleton and Eugene/Springfield also appear to attract more retail dollars per capita that the state average.

It is acknowledged that this calculation is simplistic. Many other variables would affect a more thorough analysis, such as total income, disposable income, geographic boundaries and population dispersion. However, it is probable that the biggest factor in retail dollar leakage remains the fact that small towns with limited shopping opportunities will always lose retail dollars to nearby urban centers.

Outside of Newberg, agriculture is still an important industry to the area's economy. The wine/tourism industry has an especially large impact upon Newberg. Many new businesses, such as restaurants, bed & breakfasts, art galleries, and gift shops, have been established with recognition that tourists would be a principal customer. The Yamhill Valley (consisting of portions of Yamhill and Polk County) is the heart of Oregon's $576 million wine industry, with

about 200 vineyards and 85 of Oregon's 200 wineries[40]. The wine industry in Yamhill County has grown exponentially over the last few decades.

III. Assessment of Community Economic Development Potential

Regional Employment Projections

In ~~2004, Johnson-Gardner prepared future industrial employment projections based on long-range employment forecasts by~~November 2009, the Oregon Employment Department~~. Employment~~ issued employment projections for 2008-2018. These projections ~~are shown~~considered the recession in the late 2000's, and projected a slow recovery over the coming decade. Table 12- 13~~ below. In general, employment is forecasted to rise in each employment sector through 2040~~ shows the combined employment projections for Region 2 (Multnomah and Washington Counties), Region 3 (Marion, Yamhill, and Polk Counties), and Region 15 (Clackamas County). The combined projection was used because Newberg is almost centrally located within this six county region.

Table 12- 13: ~~Industrial Employment Projections~~ Combined Employment Projection for Regions 2, 3, and 15, 2008-2018 (Multnomah, Washington, Marion, Polk, Yamhill, & Clackamas Counties)

~~Employment Sector~~	~~Industrial Space-Utilizing Employment~~							
~~Year~~	~~2005~~	~~2010~~	~~2015~~	~~2020~~	~~2025~~	~~2030*~~	~~2035~~	~~2040*~~
~~Construction~~	~~158~~	~~177~~	~~202~~	~~233~~	~~272~~	~~293~~	~~322~~	~~350~~
~~Manufacturing~~	~~2,091~~	~~2,271~~	~~2,487~~	~~2,744~~	~~3,052~~	~~3,248~~	~~3,487~~	~~3,727~~
~~Wholesale Trade~~	~~80~~	~~84~~	~~87~~	~~90~~	~~93~~	~~97~~	~~100~~	~~103~~
~~Transportation, Warehousing & Utilities~~	~~119~~	~~130~~	~~142~~	~~157~~	~~173~~	~~185~~	~~199~~	~~212~~
~~Information~~	~~38~~	~~43~~	~~49~~	~~55~~	~~62~~	~~68~~	~~74~~	~~80~~
~~Professional & Business Services~~	~~74~~	~~84~~	~~94~~	~~107~~	~~120~~	~~130~~	~~142~~	~~154~~
~~Other Services~~	~~294~~	~~332~~	~~375~~	~~423~~	~~478~~	~~518~~	~~564~~	~~610~~
~~Government~~	~~49~~	~~54~~	~~60~~	~~68~~	~~77~~	~~82~~	~~89~~	~~96~~
~~Total~~	~~2,903~~	~~3,175~~	~~3,496~~	~~3,877~~	~~4,327~~	~~4,621~~	~~4,976~~	~~5,331~~
~~**Cumulative Growth from 2005**~~	~~**-**~~	~~**272**~~	~~**594**~~	~~**974**~~	~~**1,424**~~	~~**1,718**~~	~~**2,073**~~	~~**2,428**~~

Source: ~~Johnson-Gardner. *~~

Industry	2008	2018	% Change
Construction	57,410	58,600	2.07%
Manufacturing	121,270	119,200	-1.71%
Wholesale Trade	55,840	61,100	9.42%
Retail Trade	108,630	117,700	8.35%

[40] *News-Register*

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Transportation, Warehousing & Utilities	36,480	38,300	4.99%
Information	23,500	24,200	2.98%
Financial Activities	68,970	72,300	4.83%
Professional & Business Services	81,720	88,700	8.54%
Education & Health Services	94,490	107,500	13.77%
Leisure & Hospitality	79,610	86,200	8.28%
Other Services	61,890	65,000	5.03%
Government	114,640	120,300	4.94%
Total	**904,450**	**959,100**	**106.04%**

Oregon Employment Department.

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Newberg Employment Projections

Newberg employment projections ~~extrapolated~~ for 2010-2040 were made consistent with the "safe harbor" methodology described in OAR 660-024-0040(9)[41]. This methodology allows a local government to estimate that the current number of jobs in the urban area will grow either at a rate equal to the Oregon Employment Department regional job forecast rates, or at a rate equal to the population growth rate for the urban area. Future employment projections for the Newberg urban area were made using a combination of these ~~years~~allowed methodologies.

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Retail trade and leisure & hospitality employment was projected to grow according to Newberg population growth. This was done because the need for retail services typically grows along with population, and also because of Newberg's strong potential for leisure & hospitality employment growth in its targeted industry cluster of wine/tourism.

For other industries, employment was projected to grow for the 2008-2018 period at the same rate as the projected six-county change shown in Table 12- 13 above. For employment projections beyond 2018, employment was projected to grow at the same rate as the projected population growth. This rate is in accordance with the safe harbor provision stated above, and allows Newberg to plan adequately for the 20-year planning horizon to 2030. This is essential for Newberg to maintain its desired jobs-housing balance into the future and to avoid becoming solely a bedroom community.

[41] OAR 660-024-0040 (9) states: *The following safe harbors may be applied by a local government to determine its employment needs for purposes of a UGB amendment under this rule, Goal 9, OAR chapter 660, division 9, Goal 14 and, if applicable, ORS 197.296.*
(a) A local government may estimate that the current number of jobs in the urban area will grow during the 20-year planning period at a rate equal to either:
(A) The county or regional job growth rate provided in the most recent forecast published by the Oregon Employment Department; or
(B) The population growth rate for the urban area in the adopted 20-year coordinated population forecast specified in OAR 660-024-0030.
Note that the employment projections made are for a longer period than the 20-year period. Thus, employment projections beyond this 20-year period are not currently a "safe harbor" suitable for UGB amendments, though they could become a "safe harbor" for future UGB amendments.

Table 12- 14: Projected Newberg Employment through 2040

Industry	2009	2018	2020	2025	2030	2035	2040
Construction	390	656	700	798	892	1,005	1,125
Manufacturing	2,201	2,514	2,685	3,057	3,417	3,851	4,312
Wholesale Trade	73	106	113	129	144	162	181
Retail Trade	841	1,008	1,077	1,226	1,370	1,544	1,729
Transportation, Warehousing & Utilities	181	191	204	232	259	292	327
Information	45	56	60	68	76	86	96
Financial Activities	241	283	303	345	385	434	486
Professional & Business Services	321	474	507	577	645	727	814
Education & Health Services	3,285	3,147	3,361	3,827	4,278	4,821	5,398
Leisure & Hospitality	1,018	1,085	1,159	1,320	1,476	1,663	1,862
Other Services	409	434	463	528	590	665	744
Government	175	192	205	233	261	294	329
Total	**9,180**	**10,144**	**10,836**	**12,339**	**13,792**	**15,544**	**17,404**
Cumulative from 2009	-	965	1,657	3,159	4,612	6,364	8,224

Newberg's Comparative Advantages and Disadvantages

This section, Assessment of Community Economic Development Potential (660-009-0015-4), determines the types and amounts of industrial and other employment uses likely to occur in the planning area, relating to the results of the Trends Analysis and Inventory, and considers the planning area's economic advantages and disadvantages.

Comparative Advantages

1. Small town quality of life
    a. Relatively affordable housing
    b. Attractive rural setting in heart of wine country
    c. Attractive historic downtown
    d. Full service city separate from Portland metropolitan area with deep sense of community and history.
    e. High level of ~~"social capital"~~ community engagement

2. Access to quality education and skills training
    a. George Fox University is very highly regarded. George Fox is listed among the top 100 colleges in the United States in *Forbes'* 2009-10 ranking of "America's best colleges." *U.S. News and World Report* named the University on its list of "Best National Universities," and was the only Christian college in the Pacific Northwest to make this list. The *Report* also cited an academic reputation survey of high school counselors that ranked George Fox University among the top 100

national universities. Moreover, it reported that more Portland-area valedictorians and straight-A seniors enroll at George Fox University than at any other private college in Oregon. *The Princeton Review* lists George Fox as a "Best in the West" selection.

b. Portland Community College recently passed a bond measure that will fund the construction of a branch campus in Newberg. The College will offer classes in the community in the fall of 2010. The College is expected to offer a wide range of academic and technical skills training that will serve the needs of local citizens and businesses alike.

c. The Newberg School District has a higher percentage of Newberg students that meet or exceed state standards in reading, mathematics, writing and science than state averages. Average student SAT scores are 1567 compared to Oregon average of 1550 and national average of 1511.

3. Established and growing industry clusters
   a. The percentage of employment in the manufacturing sector in Newberg is higher than state average. Average wage is high in this sector.
   b. Dental equipment manufacturing cluster is very strong, including a world leader in this industry.
   c. The new $68.5 million Providence regional medical center has created hundreds of highly-skilled, well-paying job and solidified health care as one of Newberg's target industries. The hospital has also spurred development of retirement and health care facilities for seniors.
   d. The wine/tourism industry in Yamhill County is world-renowned. Given Newberg's strategic location as the eastern gateway to the area's wine country from the Portland metropolitan region, this industry is expected to experience continued strong growth. Total direct spending for tourism in Yamhill County has gone from $29.1 million in 1991 to $60.7 million in 2003 [42]. Businesses such as restaurants, bed and breakfasts, wine shops, and art galleries are benefiting from this rising industry and are actively pursuing these customers. In particular, Newberg's historic downtown has experience significant revitalization in recent years, much of it due to the increasing impacts of this industry. In 2009, the Allison, a large luxury inn and spa targeting wine tourists, was opened. This development was a significant investment in this local industry and a very demonstrative statement in its future.

4. Strong local support for business and employment opportunities
   a. Newberg commits staff resources to retain existing business and recruit new businesses .
   b. Newberg is commitment to planning "shovel ready" industrial sites.
      i. Sportsman Airpark Master Plan preserves the functional aspects of this airport. It also reserves developable industrial land for businesses that would benefit from having close access to airport services.

[42] Dean Runyan Associates

ii. South Industrial Area Master Plan provides for the development of new industrial sites of various sizes that have good transportation access, especially to Interstate 5.

c. The Chehalem Valley Chamber of Commerce has high membership and very active in supporting members, business, and industry.
d. Coordination with County ensures that land outside city limits is reserved for intended employment uses and not converted to residential or commercial uses

5. Proximity to Portland metropolitan region
   a. Newberg has access to large market area, including the Portland-Vancouver area. This also provides access to other regions, including the Seattle, the Bay area and even Asian markets.
   b. Newberg has access to major state highways: Highway 99W and 219, and ~~10 to~~ as little as 15 minute access to I-5.
   c. Newberg has access to national/international transportation facilities, including air and water transportation facilities at the Port of Portland.
   d. Newberg has strong relationships with other economic development organizations in the region.

6. Future Newberg-Dundee Bypass
   a. The Newberg-Dundee Bypass is included in Oregon's Highway Plan. The location EIS has been approved. Plans are currently underway to construct a first segment of the bypass within 5-10 years.
   b. The Bypass will provide improved transportation facilities that will benefit existing industrial users (airport, Highway 219) in south Newberg by allowing traffic from those areas to access Highway 99W and SW Portland area markets without routing truck traffic through downtown.
   c. The Bypass will provide improved access to Newberg and the Portland region from I-5 (via Highway 219).
   d. The Bypass will reduce traffic in downtown Newberg and facilitate the objective of having a pedestrian-oriented city and retail and service center.
   e. The Bypass will provide improved transportation facilities near flat serviceable land in south Newberg.

7. Oregon's Statewide Planning Goals. Economic development in Oregon is strongly influenced by many of these goals. In particular, Goal 9 requires cities to identify comparative advantages, targeted employment opportunities and site requirements and to reserve land for long-term industrial uses. Compared to national and international competitors, this required planning work can help ensure that Newberg's efforts in the retention and recruitment of businesses is targeted, efficient and effective.

Comparative Disadvantages

The global economy provides strong competition for local, regional and national manufacturers. Many other countries, such as China and India, are attracting manufacturing facilities through a growing, trained workforce with lower, average wages than this region. Some of Newberg's disadvantages in competing in a regional and national marketplace include:

1) Transportation and access issues:
    a. Congestion on Highway 99W and travel times to Metro area markets slows shipments of goods and material, employees, and customers.
    b. Truck traffic on Highway 99W prevents Newberg's historic downtown from achieving its full potential by creating an environment that is less-than pedestrian friendly.
    c. Although Newberg has easy access to I-5 via Highway 219 and McKay Road, the Donald/Aurora Interchange at I-5 has access and capacity issues that will likely require a reconfiguration or some other interchange redesign to handle increased traffic capacity from future development in the region.
    d. The Newberg-Dundee Bypass is a significant future advantage to Newberg. However, ODOT may want to limit development near the Bypass interchange with Highway 219 in the future to ensure that adequate volume and capacity standards are met. Development limitations may require trip caps or a restriction on certain high-traffic generating uses.

2) In 2009, Newberg lacks suitable industrial sites to meet needs of targeted employment opportunities:
    a. Many existing industrially zoned parcels are constrained by size, topography, or height restrictions.
    b. Some formerly viable sites have been lost due to needs for Bypass right-of-way acquisition.
    c. Some existing sites are being reserved for future expansion of adjoining industrial users.
    d. Cost of infrastructure to serve sites can be prohibitive.
    e. Newberg lacks master planned industrial and business parks that allow for immediate development when industrial firms consider location in Newberg area

3) Highly parcelized land outside the UGB limits alternatives for meeting identified site requirements. Prior to the full implementation of Goal 3 and 4 measures to protect agricultural land outside of the Newberg UGB, considerable rural residential development was permitted outside the Newberg city limits. As such, the small parcel sizes and rural homes and businesses outside of the Newberg UGB limit the availability of suitable employment sites in rural residential exception areas.

4) Newberg's commercial sector has been under considerable stress as retail paradigms have changed over the last few decades. Regional malls and the more recent development of "big-box" stores are strong competitors to Newberg businesses. While the volume sales model of these types of stores bring lower costs to consumers for goods, this pattern has had a negative impact on the relatively smaller retailers of the local economy. In addition, the ease of shopping through internet sales is being utilized by growing number of customers. Many locally-owned businesses find it difficult to compete under this new paradigm, a situation that has forced many of them to go out of business.

5) In addition, Newberg's close proximity to the Portland metro area and relatively low

retail opportunities results in retail dollar "leakage" from the community. This means that fewer retail dollars stay in the community and continue to circulate within the local population.

6) Despite major investments in the last few years, SP Newsprint is experiencing financial pressures due to changing market conditions. The financial pressures on SP Newsprint are mostly on the macroeconomic scale, significantly reducing Newberg's ability to positively impact this situation.

7) Oregon's Statewide Planning Goals. Economic development in Oregon is strongly influenced by many of these goals. Balancing of these goals often creates a planning process for local economic development that is long, expensive, and uncertain: a process that is frequently incompatible with needs of an ever-increasingly fast-paced business world. It can prevent including suitable industrial and employment sites when needed.

Special Opportunities

Beyond the regional economic markets, Newberg has several special opportunities to capitalize on its unique niche geographically and in the market place. These are discussed below.

Dental Equipment Cluster

Newberg is the home of A-dec, one of the largest dental equipment manufacturers in the world. This also has spurred other dental equipment companies, such as DCI International and Beaverstate Dental, and several other industries that supply machined parts, electrical supplies, or other equipment. The dental industry is an expanding market, especially in Asian markets where dental care is increasing. There are over 30 billion teeth in China: if Newberg suppliers can capitalize on even a small part of this market, they could expand substantially.

Alternative Energies

As concerns of peak oil, global warming, and carbon emissions rise, so do opportunities for the alternative energy industry. Several Newberg firms already have begun to capitalize on this industry. Harris Thermal constructs heat exchange equipment that is used in the manufacture of biofuels. Climax Portable Machine Tools constructs equipment that is used in the maintenance of wind power turbines. Local companies such as Voltair are manufacturing wind turbines for private sale. The Newberg area has an expanding wind energy cluster of suppliers, manufacturers, and technicians. Newberg has excellent opportunities to capitalize on this market.

South Industrial Area

As noted in the discussion of regional industrial land availability on page 13, the region has a significant lack of suitable industrial sites. In particular, the region lacks large, flat industrial

sites with good transportation access and available utilities. In addition, the state's Industrial Lands Advisory Committee found,

> *Land located at existing freeway interchanges, such as the Stafford District at I–205 and Stafford Road, Langdon Farms at the I–5 and Charbonneau exit, and the I–5 Donald/Aurora exit are logical market driven locations for large scale industrial and employment intensive development.* [43]

However, they also found:

> ***Donald-Aurora I–5 Interchange****—The Donald-Aurora interchange on I–5 is approximately 20 miles south of Portland. Although this is a prime location for industrial development when viewed from a market perspective, the land surrounding the interchange is zoned Exclusive Farm Use (EFU) and is in not within any jurisdiction's UGB. Given current land use laws these are substantial obstacles to development.* [44]

Newberg's South Industrial area is along Wynooski Road and Highway 219. Newberg recently prepared the *South Industrial Area Master Plan*, which envisions utilizing the area along Highway 219 south of Wynooski Road by including several large, flat parcels for future industrial use. The South Industrial Area is uniquely posed to accommodate industrial users in the region:

- It contains large, level sites. The area can accommodate employers needing sites of 10 acres up to 100 acres.
- The area is adjacent to Newberg's existing industrial areas, and is a logical extension of that area.
- It has excellent access. The area is about a 10-15 minute drive to I-5 without traveling through any intervening urban areas. The future Newberg-Dundee bypass will travel east to the Portland metro area through no traffic lights until the Portland UGB. It will allow travel west to the Oregon Coast through only one stop light, and to the Mid-Willamette Valley with few stops.
- Newberg has the utility capacity to serve the area with relatively short extensions.
- The area has excellent riparian buffers consisting of two stream corridors between the proposed future industrial area and conflicting uses. No travel would be required through residential or commercial areas.

Were the area included in the Newberg Urban Growth Boundary, it certainly would attract the target industries Newberg is seeking.

[43] *Industrial Lands Advisory Committee Report*, December 15, 2003
[44] *Industrial Lands Advisory Committee Report*, December 15, 2003

Aviation Related Industry

Newberg is home to the Sportsman Airpark. This is a private/public use airport in the Urban Growth Boundary. The Sportsman Airpark Industrial District is situated next to the landing strip. The Sportsman Airpark District has three important advantages over other airport related industrial areas:

- Industrial land can be owned by individual users. In most industrially zoned districts near airports, land can only be leased to users, and "through the fence" use of adjacent industrial land is not allowed.
- All adjacent land is within the UGB.
- The airpark is adjacent to the Airpark Residential Zone, which allows business owners and entrepreneurs to live in close proximity to their planes.

With these advantages, the airpark presents excellent opportunities for small to medium industrial users. It can accommodate aircraft related industries, such as manufacture of airplane parts or aircraft maintenance. It can also attract entrepreneurial businesses that need to use a plane for business travel, visiting clients, or delivering goods. A good example of this is a new company in town, Voltair, which is constructing a new facility in the Airpark Industrial area. Voltair is a manufacturer of wind turbines and their location in the Airpark Industrial area will allow for quick access for maintenance crews to fly to eastern Oregon to service turbine installations.

Nursery and other Agricultural Products

As noted in the section *Yamhill County Agri-Business* on page 10, Yamhill County has developed the *Yamhill County Agri-Business Economic and Community Development Plan*. Of particular note in the plan is the predominance of the nursery and greenhouse crop industry in Yamhill County, following by the grass seed and fruit and nut products. All of these are present in the Newberg area. The plan identified needs for processing facilities in the County for these and other agricultural products. The plan includes several strategies to promote the agricultural industrial. Of particular relevance to Newberg are the following recommended strategies:

> Rezoning to accommodate prototype development projects. *Analysis has revealed the types of representative projects needed to support agriculture and tourism lack adequate sites. Rezoning enables communities to place these projects where they "fit" and provide benefits to the community.*
>
> Site assembly. *Preparing land for development, from initial site selection through planning and marketing, is site assembly. To assure job growth and allow for new investment, communities will need to be proactive in identifying an adequate supply of properly sized, suitably zoned development sites and be active participants in the development process.*

> County-wide infrastructure strategy. *The most pressing problem for every community is infrastructure. Regional cooperation in Yamhill County to jointly plan for the future and secure adequate drinking water supplies can be a model for cost saving inter-agency arrangements for other services. Moving ahead with a reprisal solution for drinking water is critical for many Yamhill County communities.*[45]

Newberg has the infrastructure capable to support such processing facilities. The South Industrial area provides adequate sized sites that would accommodate small and large processing facilities.

Of course converting agricultural land to other uses should not be taken lightly, as that land is important to the agricultural industry. Newberg can assist in this respect by maintaining an urban growth boundary and providing adequate land within that boundary to meet urban land needs at relatively dense development levels. Agricultural land only should be included in the urban area where there is a demonstrated need.

Wine/Tourism Industry

The Chehalem Valley Chamber of Commerce recently branded the area as "the Gateway to Oregon Wine Country." Vineyards and wine productions is a booming business in the Chehalem Valley. This is attracting a great number of tourists, most with money to spend. This has spurred a number of associated economic opportunities, including:

- Accommodation and Hospitality services. Newberg is home to Oregon wine country's premiere facility: The Allison Inn and Spa. It also is home to several bed and breakfast inns and other hotels.
- Restaurant and wine tasting. Newberg features several opportunities for fine dining, including the Painted Lady and the Jory at the Allison. Downtown Newberg features several wine bars. There are many opportunities to expand fine and casual dining and wine tasting.
- Arts and Culture. Newberg's downtown has a strong and growing arts community. The Chehalem Cultural Center is set to open soon and will allow art creation and exhibits. This is a strongly growing sector with a lot of opportunity.
- Golf and Recreation. Newberg is home to the Chehalem Glenn Golf Course, one of Oregon's best. This publicly owned course attracts tourists from around the region. A third nine holes is planned, which will further promote the tourism in the area. Additional recreation opportunities, such as for bowling or a family fun center, are desired in the community.
- Riverfront commercial. Newberg has an adopted Riverfront Master Plan for areas along the Willamette River. This future development area will allow views of the Willamette while one shops, dines, or stays. The riverfront area provides access to Roger's Landing, one of the best and most used accesses to the Willamette River.

[45] Barney & Worth, Inc., page 43.

Retail

Newberg's retail objectives, beyond promoting the wine and tourism industries, focus on providing opportunities for local residents and businesses to obtain the goods the need without travel outside the community. Newberg does have strong retail areas, but sales of certain retail goods are either missing or undersupplied. In many cases the goods are available regionally, but Newberg residents must drive to other areas, such as Washington Square, Wilsonville, Sherwood, or McMinnville. As of 2009, the following retail services are either missing or undersupplied in Newberg: office supplies; electronics; clothing and footwear; sewing supplies; sporting goods; appliances; whole and natural foods. Additional retail services in these areas would be welcome.

IV. Newberg's Economic Development Strategy

Capitalizing on Comparative Advantages & Addressing Comparative Disadvantages

Table 12- 15: Strategies to Capitalize on Comparative Advantages

Advantage	Strategy / Action
1. Small Town Quality of Life	• Continue to provide relatively affordable housing opportunities. • Minimize adverse impacts on existing and planned residential neighborhoods from conflicting employment opportunities. • Continue revitalization efforts of historic downtown. • Support organizations that foster "social capital". • Work to improve the pedestrian/bicycle network in Newberg. *(Applicable Comprehensive Plan policies: 1.p., 1.q., 3.a.)*
2. Access to Quality Education and Skills Training	• Continue to support the Newberg School District, George Fox University, and Portland Community College in their efforts to train and motivate the kind of workforce required by existing and future employers in Newberg. *(Applicable Comprehensive Plan policies: 1.f., 1.q.)*
3. Strong Established and Growing Industry Clusters	• Provide sufficient land near existing industrial areas to allow for expansion. • Provide suitable sites with characteristics required by such industries to take advantage of industrial clusters in Newberg. • Encourage the reuse/redevelopment of properties in zones allowing business. *(Applicable Comprehensive Plan policies: 1.b., 2.e., 2.g.)*
4. Strong Local Support for Business and Employment Opportunities	• Continue to plan for future employment opportunities by providing suitable sites for industrial (export) and commercial uses. • Continue to work collaboratively with the State, Yamhill County, and local businesses to fund infrastructure and planning necessary to maintain and attract desired employment. • Continue to work with and support the Chehalem Valley Chamber of Commerce. *(Applicable Comprehensive Plan policies: 1.m., 1.n., 1.o., 3.b.)*
5. Proximity to Portland Metropolitan Region	• Continue to work with Metropolitan area partners in promoting the economic advantages of the region. • Provide opportunities for identified regional employment clusters in Newberg. • Continue to advocate for improved access to regional markets, via Highways 99W and 219 and the Interstate. • Continue to maintain rail and air access opportunities. *(Applicable Comprehensive Plan policies: 1.f., 1.o., 2.g.)*
6. Future Newberg-Dundee Bypass	• Continue to work with the Oregon Legislature and State agencies to build political support and ensure funding for the Bypass. • Encourage support, funding and construction of the full Bypass project. *(Applicable Comprehensive Plan policies: 1.o.)*
7. Oregon's Statewide Planning Goals	• Newberg has taken advantage of Oregon's Economic Development Program (Goal 9) by identifying comparative advantages (and disadvantages), targeting export-based employment clusters, identifying and providing for the site requirements necessary to maintain and attract such clusters in Newberg, and coordinating with Yamhill County and affected state agencies to retain and provide services to suitable employment sites. Newberg will continue to coordinate with these agencies. *(Applicable Comprehensive Plan policies: 1.f.)*

Table 12- 16: Strategies to Address Comparative Disadvantages

Disadvantage	Strategy / Action
1. Transportation and Access Issues	• Continue to work with the Oregon Legislature and State agencies to ensure funding for the Newberg-Dundee Bypass. • Continue to advocate for Highway 99W improvements to reduce congestion and maintain regional connectivity. • Continue to work with ODOT for review of all development proposals in areas that may impact a state highway facility. *(Applicable Comprehensive Plan policies: 1.o.*)
2. Lack of Suitable Employment Sites	• Newberg has considered local, regional, state and national economic trends and identified industry clusters that the City has a reasonable likelihood of attracting to the community. • Newberg has also researched and identified the site characteristics demanded by firms within these industry clusters. Newberg is actively planning for a future industrial area that will meet both the industrial site characteristics and the land needs of the city's population over the next 30 years. *(Applicable Comprehensive Plan policies: 2.h., 2.g.)*
3. Limited Suitable Land Supply Outside UGB	• After considering the potential for rural residential exception areas to meet identified site requirements, the City has selected sites on agricultural land that will be reserved for identified employment needs. *(Applicable Comprehensive Plan policies: 2.e., 2.g.)*
4. and 5. Stressed Commercial Sector and Retail Dollar Leakage	• Recruit businesses that can fulfill commercial needs that are currently being unmet locally. • Support small businesses that are adjusting these new retail realities by either focusing on high quality customer service and/or gearing their business plans toward niche markets. • Encourage local retail businesses to improve their online presence. *(Applicable Comprehensive Plan policies: 1.c., 1.i).*
6. Market Pressures on SP Newsprint	• Newberg will continually look for opportunities to work with SP Newsprint to help reduce their operational costs. *(Applicable Comprehensive Plan policies: 2.d.)*
7. Oregon's Statewide Planning Goals	• Newberg will continue to pursue Urban Growth Boundary amendments and Urban Reserve expansions to provide adequate land for future uses. *(Applicable Comprehensive Plan policies: 1.f.)*

Regional Focus

Newberg has recognized the importance of being part of a shared, regional economic vision. *Beyond the Vision: A Strategic Plan for the Chehalem Valley* is a document that was created cooperatively between five governmental entities located within the Chehalem Valley. This document was adopted by the Newberg City Council in January 2005. One section of this document, called *Economy and Employment*, describes the economic future of the area as follows:

> *A diversified economy provides balanced economic opportunities for the residents of the Chehalem Valley. Agriculture and agribusinesses are an important component of the local economy. The natural beauty of the area encourages*

> *tourism and the wine industry. A carefully targeted retail recapture strategy has encouraged more local shopping and minimized buying outside of the area. Downtown areas are vibrant commercial areas that support the local economy.*
>
> *Clean industries have been developed using a "campus" design. Plenty of family wage jobs are available for citizens of the area. Tourism is a major economic force, its strengths based on the premise that the Chehalem Valley is 1) the gateway to the wine country; 2) characterized by a clean and comfortable environment; and, 3) offers the historical experience of a friendly, small town and village America in the earlier period of the 20th century. As a destination location for visitors, the community of Dundee now has two small exclusive hotels and bed and breakfast inns. The service industry has expanded, with the health industry and health research being a major provider of employment in this sector of the economy.*[46]

Key strategic steps laid out for the *Economy and Employment* section of the plan are as follows:

- Hold a broad community forum on economic development to build consensus.
- Invigorate the Chamber of Commerce Economic Development Committee.
- Seek financial aid in the form of grants.
- Develop community college training programs tailored to the labor force needs of prospective employers.

The regional economic development paradigm is expected to continue in the foreseeable future. Newberg has worked extensively with the Mid-Willamette Valley Council of Governments and the Oregon Business Development Department for many years. With an understanding that Newberg's economic future is likely to be strongly linked with fortunes of the Portland region, the City has recently developed relationships with economic development organizations in the metropolitan area. In the summer of 2004, the City of Newberg joined the Association of Regional Economic Development Partners, Inc. (now the Portland-Vancouver Regional Partners Council for Economic Development.). The Partners is "a public-private partnership that focuses on shared economic priorities and works to implement business retention, expansion, and recruitment as well as marketing strategies and recommendations for policy development. The members are public and private sector economic development professionals in the region who have worked collaboratively for more than 10 years to retain and recruit businesses, and promote the metropolitan region as a vital economic center."

On January 3, 2005, the Newberg City Council passed Resolution No. 2005-2554, which stated the city's support for the framework of the Portland Regional Business Plan of the Regional Economic Development Partners.

[46] *Beyond the Vision: A Strategic Plan for the Chehalem Valley*

Locally Targeted Economic Development Industry Clusters (Target Industries)

The majority of Newberg's economic development efforts should continue to be focused upon supporting existing local businesses. In the economic development profession, there is a general principle call the "80/20 rule", which means that 80 percent of an area's economic development efforts should be dedicated towards the retention and expansion of existing local businesses. In addition, it is often said that "Your good businesses are your competitor's best recruitment prospects!" Therefore, a community should ensure, as much as possible, that their local businesses are content and prosperous, or else they may look elsewhere to do business. In summary, it is far easier, effective and efficient to try to maintain and expand your economy through one's local industries than to attract new ones.

As important as Newberg's retention efforts are for its economic health, recruiting specific new businesses to Newberg such as those listed in the Portland-Vancouver Regional Business Plan and the Newberg EOA is a critical aspect of Newberg's economic development strategy. Some of these businesses can be recruited to strengthen existing clusters within the community. Others are new types of businesses that can be attracted based on combination of three factors: a business' cluster strength in the Portland region; Newberg's close proximity to the metro area, and Newberg's unique high quality of life compared to other communities in the region. The City's business recruitment efforts should be focused on identified strong, traded-sector clusters. These types of businesses will bring new wealth to the community and diversify the local economy, thereby creating an economic base that is stronger and more stable. Table 12- 17 on page 40 lists industries on which Newberg should focus its economic development efforts.

Table 12- 17: Newberg Targeted Industries

Business Cluster	Targeted business types
Manufacturing and Industry	
High Tech Manufacturing	Semiconductors/silicon, imaging & display technology
	Nano & micro technology, cyber-security, health/medical information technology
	Biotech/bioscience (medical devices, bioinfomatics, pharmaceuticals, genomics, anti-virals)
General Manufacturing	Dental equipment
	Metals, machinery, transportation equipment
	Lumber and wood products (value added)
	Sustainable industries (renewable energy, resource efficiency technologies, sustainable building materials, green chemistry)
	Distribution & logistics
	Sports apparel/recreation-related products
Aviation related	Specialty aircraft equipment, aircraft repair, machine shops, small entrepreneur business
Agriculture	Wineries
	Specialty foods and food processing
	Nursery and agricultural products (value added)
Services	Professional services architecture, engineering, legal and financial services, etc.
	Creative services (advertising, public relations, film and video, web/internet content and design)
Health Care	
	Providence Medical Center Expansion, medical offices, senior services
Higher Education	
	Portland Community College campus, George Fox University expansion, high school vocational training and college preparedness, private post-secondary training
Wine/Tourism	
	Wineries and tasting rooms, restaurants, art studios, theater and entertainment, recreation (golf, bowling), conference facilities, specialty retail

Source: Newberg Planning Division

Comprehensive Plan Policies and Recommended Supportive Economic Development Actions

Newberg has developed a vision for the community's economic future. The City of Newberg's adopted Comprehensive Plan includes a list of goals and policies that help shape Newberg's future economy (Section H. The Economy). The following is a list of Newberg's recommended economic development actions and the applicable Comprehensive Plan policies they support. All of the Comprehensive Plan policies are from Section H (The Economy) and support the larger goal "To develop a diverse and stable economic base".

1. Work with the State to "certify" industrial sites to shorten the development time of projects and provide certainty to a business that regulatory and permitting issues will not delay the project's timeline.
   Applicable Comprehensive Plan policies: 1.f., 2.g.

2. Identify and implement cost and time saving measures that improve the development permitting process.
   Applicable Comprehensive Plan policies: 2.d.

3. Develop a financial incentives "toolbox" to recruit new businesses and encourage existing business expansions. The incentives should be applied only after a proposed project has been reviewed by a rigorous analysis that demonstrates a clear benefit to the City.
   Applicable Comprehensive Plan policies: 1.b., 1.g.

4. Maintain a useful economic development website that is easy to navigate and contains substantive content that meets the needs of business.
   Applicable Comprehensive Plan policies: 1.a., 1.g.

5. Work with local, regional and state educational and training resources (private and public) to assist with the workforce training needs of businesses and provide opportunities for workers to voluntarily upgrade their skills. The available workforce pool in the Newberg region is approximately 223,000. The regional workforce is estimated by using the assumption that a 23 minute mean commute time (2000 Census) draws workers from an approximately 15 mile radius from the center of Newberg Oregon is recognized for having an educated workforce, one with good basic work skill sets that allows them to be relatively easily trained.
   Applicable Comprehensive Plan policies: 1.c., 1.f.

6. Gauge the health of local businesses regularly and identify how the City can help resolve issues, when feasible. Focus should be on businesses of the traded-sector and local clusters. Anticipate local problem areas by keeping abreast of regional, national, and international business trends.
   Applicable Comprehensive Plan policies: 1.p.

7. Develop closer ties to organizations/businesses located within the Portland area with a similar interest in regional economic development (e.g. Regional Economic Development Partners, future Portland Economic Development District, etc). However, joining METRO will not be considered. Reevaluate current relationship with Mid-Willamette Valley Community Development Partnership.
   Applicable Comprehensive Plan policies: 1.f.

8. Develop a Downtown Revitalization Master Plan prior to the construction of the Newberg-Dundee Bypass. Identify funding sources necessary to implement the plan.
   Applicable Comprehensive Plan policies: 3.a.

V. Industrial and Commercial Land Needs and Supply

To encourage and accommodate future commercial and industrial growth, Newberg must have developable land readily available with characteristics necessary to be competitive in the regional economic development market. Newberg's Ad Hoc Committee on Newberg's Future recently completed an analysis of the community's future land use needs. That analysis is described in the *Report to Newberg City Council; Recommendations for Newberg's Future*, which was accepted by the Newberg City Council on July 21, 2005. On August 1, 2005, the City Council initiated the amendment process for the comprehensive plan changes recommended in the Report. The following are the Committee's recommendations for commercial and industrial land needs for Newberg's future. These also include updates made in 2009 to reflect development since the time of the report.

Industrial Land Need

Industrial Employment Projections

~~In 2004, Johnson-Gardner prepared future industrial employment projections based on long-range employment forecasts by the Oregon Employment Department. Employment projections by industry are shown in~~ Table 12- 18 ~~on page 24. In general,~~ below projects the future industrial space utilizing employment ~~projections show growth~~ in ~~all of Newberg's industrial sectors~~Newberg through 2040. -The table uses the total employment projected in Table 12- 14 ~~below shows the projected cumulative employment growth through the year 2040.~~

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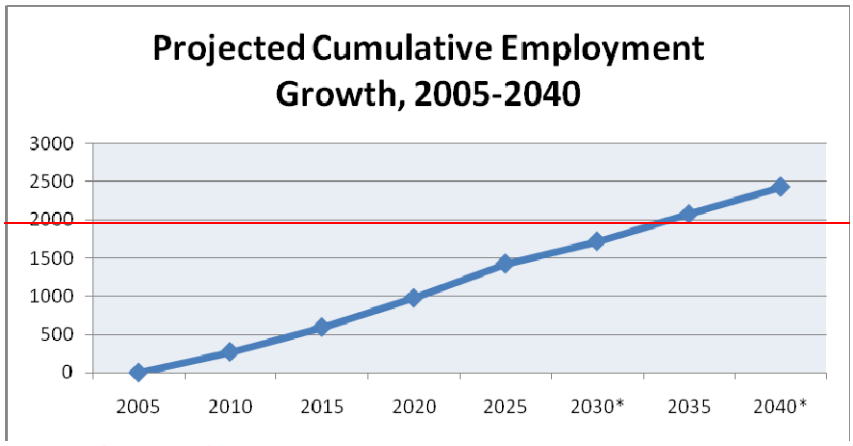
~~**Figure 12-3: Projected Cumulative Employment Growth, 2005-2040**~~



~~Source: Johnson-Gardner~~

on page 27. The table then calculates the percent of that employment that will utilize industrial space using the same percentages from Johnson-Gardner's 2004 *City of Newberg – Demand for Commercial and Industrial Land* report.

Table 12- 18: Industrial Space Utilizing Employment Projection through 2040

Industry	% Industrial Space Utilizing	2009	2018	2020	2025	2030	2035	2040
Construction	*30%*	117	197	210	239	267	301	337
Manufacturing	*91%*	2,003	2,287	2,443	2,782	3,110	3,505	3,924
Wholesale Trade	*82%*	60	87	93	105	118	133	149
Retail Trade	*0%*	-	-	-	-	-	-	-
Transportation, Warehousing & Utilities	*93%*	169	177	189	216	241	272	304
Information	*88%*	39	49	53	60	67	76	85
Financial Activities	*0%*	-	-	-	-	-	-	-
Professional & Business Services	*18%*	58	85	91	104	116	131	146
Education & Health Services	*0%*	-	-	-	-	-	-	-
Leisure & Hospitality	*0%*	-	-	-	-	-	-	-
Other Services	*93%*	380	403	431	491	549	618	692
Government	*0%*[47]	-	-	-	-	-	-	-
Total		2,825	3,286	3,510	3,997	4,468	5,035	5,638
Cumulative from 2009		-	461	685	1,172	1,642	2,210	2,812

Industrial Site Requirements

A variety of parcel sizes, building types, and land use designations are required to provide suitable sites to attract targeted industry clusters. In 2005, the *Report to Newberg City Council; Recommendations for Newberg's Future* documented that there was a general lack of suitable large (20+ acre) industrial sites with access to a state highway and physical separation or transitional buffering from residential neighborhoods. The report documented an additional need for 4-5 large (20+ acre) industrial sites for the period 2005-2025. Industrial land needs for the 2005-2025 period totaled about 216 acres, with an additional 6 sites needed for the period 2026-2040. The assumption was that approximately 50 percent of future industrial employment will take place on large parcels.

In 2009, the Department of Land Conservation and Development (DLCD) encouraged the City to refine its target industries analysis and site needs requirements to determine whether a UGB amendment could be justified. The City has since worked closely with OBDD to refine its industrial site requirements.

This section includes four tables:

1. Table 12- 19 describes average site sizes for targeted industry sectors and clusters;
2. Table 12- 20 arranges targeted industry sectors and clusters into site size ranges and provides examples of existing Newberg industries in those clusters and ranges; and

[47] Johnson-Gardner estimated 35% of government employment would be industrial space utilizing. The amount of government related industrial land is accounted in the "Public/Quasi-Public" category, thus is not included here.

3. Table 12- 21 associates projected employee growth with site sizes, including redevelopment assumptions, to project a number of needed sites within each site size category.
4. Table 12- 22 describes the site suitability characteristics required for light industrial and Airport-related developments.

Table 12- 19 links targeted industry clusters discussed in this EOA with uses identified in the 2005 *Report to Newberg City Council*. These clusters and uses were allocated site size ranges based on ECONW and a meeting with Oregon Business Development Department (OBDD) representative Tom Fox on September 10, 2009. Site size ranges were verified against OBDD data relating to real firms seeking sites in Oregon, in the targeted industry clusters. Industry clusters containing firms that could potentially require large sites – 10-30 acres or 30-50 acres in size – are identified by the Potential Large Site Category columns. Thirteen industry clusters include firms that could potentially require 10-30 acre sites, and nine include firms that could potentially require 30-50 acre sites.

OBDD reviewed the site size ranges by targeted industry cluster in Table 12- 19 and supports the estimated site sizes and ranges as viable and marketable for Newberg's targeted industries.

Table 12- 19: Site Size Ranges by Targeted Industrial Cluster and Sector

Industry Cluster	Uses	ECO/WB* (Acres)	OBDD** (Acres)	Newberg Examples (Acres)	Potential Large Site Categories	
					10 - 30	30 - 50
High Tech Manufacturing	Electronics, Other	10 - 30	10 - 60	6 - 55	X	X
	Health, Nano/Micro Tech, Cyber Security	5 - 20		6 - 55	X	X
	Bio-Tech/Bioscience/ Pharmaceuticals, Health Services	5 - 40	2 - 60		X	X
General Manufacturing	Dental Equipment	5 - 40		2 - 55	X	X
	Fabricated Metals, Plastics	10 - 20	10 - 20	3 - 7	X	
	Transportation Equipment	10 - 30	10	1	X	
	Industrial Machinery	10 - 20	10 - 20	3 - 6	X	
	Lumber and Wood Products (Value Added)	1 - 10	10	243	X	X
	Sustainable Industries	5 - 25	25 - 200	1 - 7	X	X
	Distribution and Logistics	5 - 60	30 - 60		X	X
	Sports and Recreational Campus	10 - 50			X	X
Airport Related Industrial	Specialty Aircraft Equipment, Aircraft Repair, Machine Shops, Small Entrepreneur Business	1 - 70	70	1 - 3		
Agriculture	Winery			3 - 5		
	Specialty Foods and Food Processing	1 - 10	10 - 150	5	X	X
	Nursery and Ag Products (Value Added)	1 - 10		2 - 13	X	
Services	Professional Services	1 - 5		1 - 2		
	Creative Services, Printing, Publishing	1 - 10		1 - 2		

*ECO/WB: EcoNorthwest and Winterbrook Planning
**Outside Investment Prospects, OECDD (OBDD), Oct 2008

Table 12- 20 below arranges the identified target industry clusters and sectors by potential site sizes, and associates those sizes with existing Newberg industries. As shown in Table 12- 19, some industry clusters and sectors appear in multiple site size categories due to wide potential ranges. Of note, Newberg's existing large industrial sites (A-Dec and SP Newsprint) are over 50 acres in size.

Newberg has an excellent example of a high tech traded-sector manufacturing cluster – three large firms in the dental industry. A-Dec, A.R.E. Manufacturing, and Dental Components Inc. employ slightly over 1,000 people on 67 acres of industrial land. It is not unreasonable for Newberg to assume similar success with another targeted-industry cluster. As such, 10-30 and 30-50 acre sites should be included to provide the City with this opportunity.

Table 12- 20: Targeted Industry Clusters and Sectors by Site Size Ranges and Existing Newberg Industrial Firm Examples

Site Size Range	Industry Clusters/Uses	Newberg Industry Examples
<10 Acres	• Health, Nano/Micro Tech, Cyber Security • Bio-Tech/Bioscience/Pharmaceuticals • Dental Equipment • Fabricated Metals, Plastics • Lumber and Wood Products (Value Added) • Sustainable Industries • Distribution and Logistics • Airport Related Industrial • Winery • Specialty Foods and Food Processing • Nursery and Ag Products (Value Added) • Professional Services • Creative Services	• Climax Portable Machine Tools • PPM Technologies • A.R.E. Manufacturing • Dental Components Inc. • Ushio Oregon • Harris Thermal Transfer Products • Airpark Business Complex
10 – 30 Acres	• Electronics • Health, Nano/Micro Tech, Cyber Security • Bio-Tech/Bioscience/Pharmaceuticals • Dental Equipment • Fabricated Metals, Plastics • Transportation Equipment • Industrial Machinery • Lumber and Wood Products (Value Added) • Sustainable Industries • Distribution and Logistics • Sports and Recreational Equipment Campus • Specialty Foods and Food Processing • Nursery and Ag Products	• Suntron Corporation[48]
>30 Acres	• Electronics • Health, Nano/Micro Tech, Cyber Security • Bio-Tech/Bioscience/Pharmaceuticals • Dental Equipment • Lumber and Wood Products (Value Added) • Sustainable Industries • Distribution and Logistics • Sports and Recreational Equipment Campus • Specialty Foods and Food Processing	• SP Newsprint Company • A-dec, Inc.

[48] Suntron announced plans to close operation in Newberg in 2010.

Table 12- 21 links projected 2030 industrial employment[49]- from Table 12- 18 on page 43with potential site size ranges. While examples can be found of large sites with few employees, and small sites with many employees, larger employers generally require larger sites. This table is one way to address that dynamic while relating projected industrial site needs to adopted employment projections.

The data is based on the assumption that most sites under 10 acres will be located in industrial parks, which will require dedication of an average of 15% right-of-way for streets and utilities. For sites over 10 acres, the table assumes 5% of the area for streets and utilities. The table also includes assumptions that most (55%) of Newberg's future industrial employment will be located on sites 10 acres or less, and that one-third of those future new industrial firms under 10 acres in size, and one-half of firms under 2 acres in size, will find a site through infill redevelopment or intensification of existing employment land uses.

Table 12- 21 shows the 2030 need for approximately ~~21~~24 acres of very small (under 2 acre) sites, ~~63~~75 acres of small (2- to 10-acre) sites,[50] two sites in the 10-30 acre range, and one site in the 30- to 50-acre range, for a total industrial site need of ~~168~~183 gross buildable acres by 2030. These needs for small and medium sites are consistent with recent demand for industrial land in Newberg. From 2005 to 2009, there were 24 acres of industrial land developed. A number of industrial employers expanded or constructed new facilities over that time, including Action Equipment, Climax Portable Machine Tools, Harris Thermal, A-dec, and Freeman Manufacturing. The total land needs equate to approximately ~~9.5~~10 employees per developed acre, which reflects the reality that many firms look for sites that allow for future expansion, and is consistent with the site size per employee ratio of many of Newberg's largest industrial employers.[51]

Table 12- 21: Site Size Distribution by Firm Employment (2010-2030)

Employees per Firm	Percent of Employment	Number of Employees	Number of Firms	Sites Needed	Size Range (Acres)	Average Site Size (Acres)	Average ROW Need (Acres)	Gross Buildable Acres Needed
0-9	15%	217	36	18	<2	1	0.15	21
10 to 74	40%	578	17	11	2 - 10	5	0.75	63
75 to 150	15%	217	2	2	10 - 30	20	1.00	42
150+	30%	434	1	1	30 - 50	40	2.00	42
Total	100%	1,446	56	32				168

[49] ~~Employment projections extrapolated from Johnson Gardner employment projections adopted into the Newberg Comprehensive Plan in 2005.~~

[50] Much of this site size need can be most efficiently accommodated by master planned business parks.

[51] Review of site sizes for existing industrial firms with over 50 employees in Newberg determined an average of 4.75 employees per acre. A fully developed site for an employee-rich industrial firm like A-Dec is able to achieve about 16 employees per acre. Firms like A.R.E. Manufacturing, Dental Components Inc., Ushio Oregon Inc., and Harris Thermal Transfer Products come in around 7-11 employees per acre.

	Percent of Employment	Number of Employees	Number of Firms	Sites Needed	Size Range (Acres)	Average Site Size (Acres)	Average ROW Need (Acres)	Gross Buildable Acres Needed
0-9	15%	246	41	21	<2	1	0.15	24
				20	*infill & redevelopment*			0
10 to 74	40%	657	19	13	2 - 10	5	0.75	75
				6	*infill & redevelopment*			0
75 to 150	15%	246	2	2	10 - 30	20	1.00	42
150+	30%	493	1	1	30 - 50	40	2.00	42
Total	100%	1,642	63	63	-	-	-	183

Source: Winterbrook Planning 2009, Newberg Planning Division

In addition, ~~Johnson Gardner~~there is a projected ~~710 additional~~need for 1,170 industrial employees for the period 2031-2040. At an average of ~~9.5~~11 employees/acre, which ~~is similar to the employee~~represents a 10% increase in future industrial density ~~of firms currently in Newberg~~as a further efficiency measure, plus 10% of the land area for right-of-way (based on an a mix of small and large sites), this will generate an additional need for ~~83~~117 gross buildable acres of land for the period 2031-2040.

Table 12- 22 shows the site suitability characteristics needed for these targeted industries.

Table 12- 22: Required Industrial Site Suitability Characteristics

Required Site Characteristic	Description	Statutory, Rule or Plan Basis
Site Size	• Minimum parcel size 5 vacant acres (or vacant with less than ½ acre occupied by permanent structures) • Group of at least 20 suitable acres as defined below • May include parcels with less than 5 vacant acres if site is currently an industrial use or is vacant and adjacent to industrial use or group of 20 suitable acres • Inventory to include sufficient large sites (10-30 acre and 30-50 acre categories)	ORS 197.712; Goal 14; OAR 660-009-0025; OAR 660-024-0060; Revised Newberg EOA
Topography	Exclude: • Slopes of 10% or greater • Inventoried and protected riparian corridors / wetlands • Areas within the designated Stream Corridor Overlay (which include the 100-year floodplain) • Remaining suitable area contiguous and generally rectangular in shape for efficient development	ORS 197.712; Goal 14; OAR 660-009-0025; OAR 660-024-0060; Revised Newberg EOA
Proximity to Transportation and Services	Include parcels (or group of parcels): • Within, or contiguous to existing UGB to allow for efficient extension of urban services, or as part of group of parcels that could immediately be added to UGB • Adjacent to or within 1/8 mile of a major arterial or state highway access without travel through non-industrial	ORS 197.712; Goal 14; OAR 660-009-0025; OAR 660-024-0060; Revised Newberg

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Required Site Characteristic	Description	Statutory, Rule or Plan Basis
	properties. • Provides connection to I-5 via Highway 219 • Site adjacent to Sportsman Airpark necessary for airport-related industrial uses • Adjacent to existing industrial areas, or agglomeration of at least 100 new acres to facilitate agglomeration economies and minimize adverse impacts	EOA
Compatibility (residential, downtown and resource land)	Exclude sites that: • Abut residential neighborhood on more than 25% of the site perimeter unless effective topographical or road buffers present or planned • Abut large contiguous tracts of agricultural land unless effective topographic or road buffers are present or planned • Result in truck traffic through downtown	ORS 197.712; Goal 14; OAR 660-009-0025; OAR 660-024-0060; Revised Newberg EOA; Goal 14 Locational Factors

Industrial Land and Sites

The comprehensive plan inventory of buildable industrial land was updated in 2009, consistent with the requirement in OAR 660-009-0015 (3) for an inventory of industrial and other employment land. The term "buildable industrial land" as used in this plan is consistent with the terms defined in OAR 660-009-0005 as "total supply" of "vacant" or "developed" industrial land that is "suitable" and "serviceable." Buildable land:

1. Includes lots that have any "Industrial" comprehensive plan designation. This includes land in the "Employment" Springbrook District, specific plan industrial districts, and land in the MIX comprehensive plan district zoned industrial. It excludes publicly owned properties intended for city facilities such as the wastewater treatment plant expansion, which are counted in the "public/quasi-public" category.
2. Includes lots that are:
    a. equal to or larger than one half-acre not currently containing permanent buildings or improvements; or
    b. between one-half and five acres that are likely to be redeveloped during the planning period.
    c. equal to or larger than five acres where less than one half-acre is occupied by permanent buildings or improvements.
3. Excludes portions of lots within stream corridors, with slopes over 10 percent, or currently occupied by buildings or industrial uses, or contained within the Newberg-Dundee bypass "build design alternatives options" published August 2008.

Table 12- 23 shows the existing buildable industrial land in the UGB as of 2009. Figure 12- 3 is a map of the buildable industrial land in the UGB in 2009.

Table 12- 23: Buildable Industrial Land in Newberg UGB (2009)

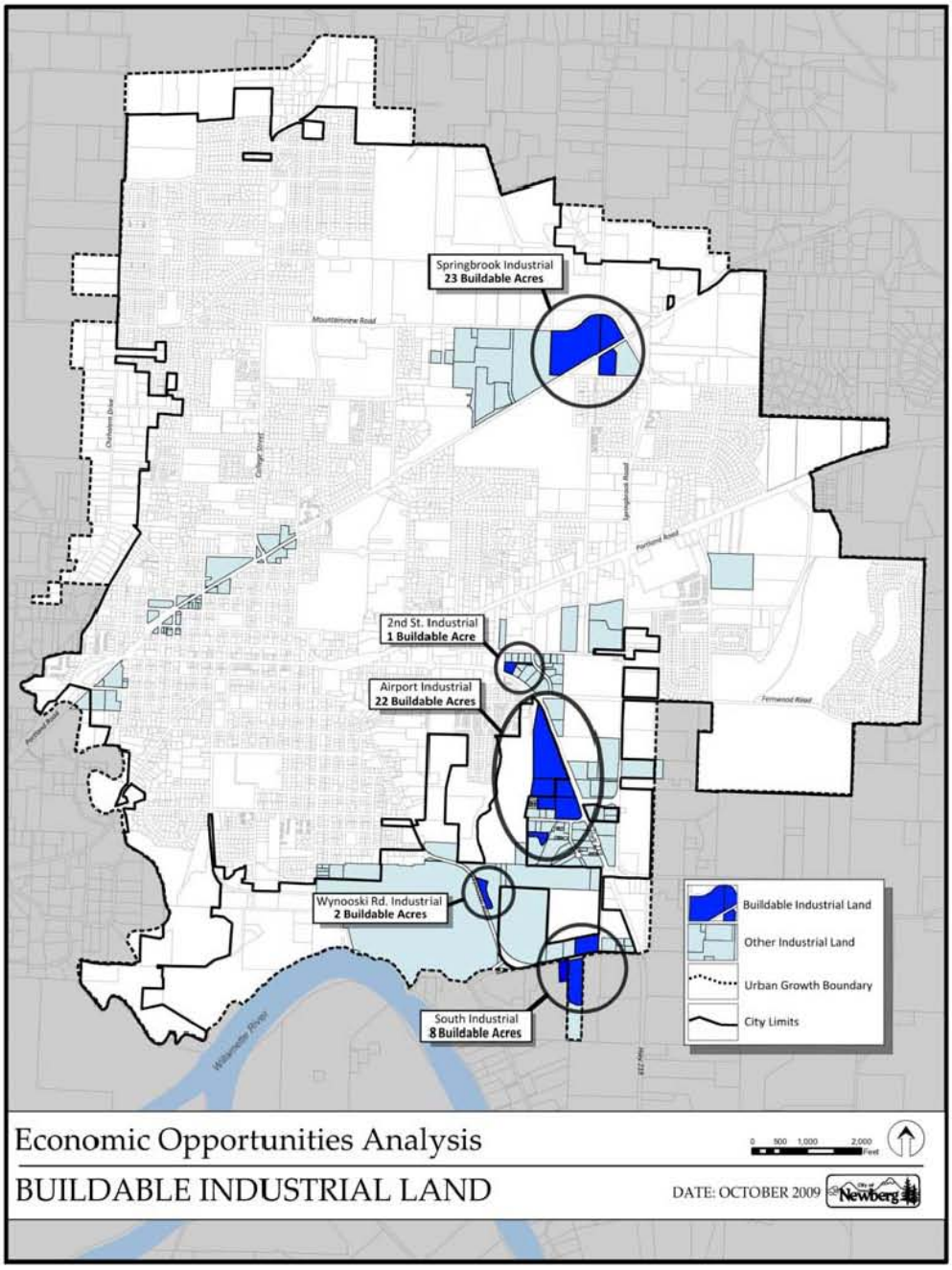
Location	Potential Uses	Buildable Acres	Site Sizes				
			< 2 ac.	2-10 ac.	10-30 ac.	30-50 ac.	Total
Springbrook Employment	Light Manufacturing or Industrial Office	23		1	1		2
Sportsman Airpark[52]	Airport Industrial	22	2	4			6
Wynooski Industrial	Light Industrial	~~9~~10	1	2			3
Elliot Road Industrial	Light Manufacturing or Industrial Office	1	1				1
Total		~~55~~56	4	7	1		12

Source: Newberg Planning Division

The current UGB has approximately ~~55~~56 buildable industrial acres. Newberg's existing industrial land supply is mostly contained within two industrial/employment park areas: approximately 23 buildable acres zoned SD/E (Springbrook District Employment) in the Springbrook area and approximately 22 vacant acres near the Sportsman Airpark. There are also about 10 acres of buildable industrial land scattered throughout the City on individual lots.

[52] The Sportsman Airpark contains one large 55-acre property that contains the existing airport, plus approximately 10.8 acres of buildable industrial land. The approved Sportsman Airpark Master Plan includes a plan for developing the buildable industrial land into an industrial park with aviation related uses. This site was counted in the 2-10 acre category, even though it contains slightly over 10 acres of buildable land, because the approved master plan envisions further division, and the aviation related uses are more likely to be separate smaller firms rather than one large firm.

Figure 12- 3: Buildable Industrial Land, Newberg UGB 2009



2030 Industrial Site Need vs. Supply

As shown in Table 12- 24, Newberg has an unmet need for one 30- to 50-acre site, two 10- to 30-acre sites, ~~33~~45 acres of 2- to 10-acre sites, and ~~16~~18 acres of sites under 2 acres in size.

Table 12- 24: 2010-2030 Industrial Land Supply and Need

Size Range (Acres)	Number of Sites - 2009 UGB	Buildable Acres - 2009 UGB	2010-2030 Needed Sites	2010-2030 Needed Gross Buildable Acres	2010-2030 Deficit # of Sites	2010-2030 Deficit Gross Buildable Acres
<2	5	6	~~18~~21	~~21~~24	(~~14~~)16)	(~~15~~)18)
2 to 10	7	30	~~11~~13	~~63~~75	(~~4~~)6)	(~~33~~)45)
10 to 30	1	20	2	42	(1)	(22)
30 to 50	0	0	1	42	(1)	(42)
Total	**13**	**56**	~~32~~**37**	~~168~~**183**	**(**~~20~~**)24)**	**(**~~112~~**)127)**

Source: Winterbrook Planning, City of Newberg

This means that Newberg's UGB should be expanded by approximately ~~112~~127 buildable industrial acres to include:

1) A 30- to 50-acre site;
2) A 10- to 30-acre site; and
3) Industrial park sites totaling approximately ~~48~~63 buildable acres.

In addition, for the period 2031-2040, Newberg will need an additional ~~83~~117 gross acres of buildable industrial land. This need has not been divided by site size, but is likely to be similar to the site needs distribution for the 2010-2030 period. The best approach would be to reserve sufficient land in the urban reserve to meet this acreage need, then include suitable land in the UGB as needs arise.

Commercial Land Need

Commercial Land Need

As Newberg's population grows, so will its needs for commercial land. Additional population will bring additional retail, office, and other commercial opportunities. In 2004, Johnson-Gardner prepared a preliminary forecast for the need for office and retail commercial land. The office land need is a function of employment growth based on long-range forecasts by the Oregon Employment Department. The retail land need is a function of household growth and typical household spending patterns. In November 2009, the Oregon Employment Department issued new employment growth forecasts for the 2008-2018 period. The Newberg Planning Division then updated the commercial land need projections for the 2010-2040 period based on this new data, as detailed below.

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Office Land Need

Table 12- 25 ~~below updates adopted commercial land needs for the~~ projects office space utilizing employment for 2010-2040 ~~timeframe~~. The table ~~subtracts actual commercial development~~uses the total employment projections from ~~2005-2009 from the land needs projected by Johnson Gardner, and~~ Table 12- 14 on page 27. The table then ~~redistributes the needs for the 2010-2030 and 2031-2040 time frames. In addition~~determines the percentage of that employment that will utilize office space using estimates from the 2004 Johnson-Gardner *City of Newberg – Demand for Commercial and Industrial Land* report.

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Table 12- 25: Office Space Utilizing Employment through 2040

Industry	% Office Space Utilizing	2009	2018	2020	2025	2030	2035	2040
Construction	*2%*	8	13	14	16	18	20	22
Manufacturing	*5%*	110	126	134	153	171	193	216
Wholesale Trade	*5%*	4	5	6	6	7	8	9
Retail Trade	*5%*	42	56	60	68	76	86	96
Transportation, Warehousing & Utilities	*30%*	54	57	61	70	78	88	98
Information	*90%*	40	50	54	61	69	77	87
Financial Activities	*90%*	217	255	273	310	347	391	438
Professional & Business Services	*90%*	289	427	456	519	580	654	732
Education & Health Services	*40%*	1,314	1,259	1,344	1,531	1,711	1,929	2,159
Leisure & Hospitality	*40%*	407	544	582	662	740	834	934
Other Services	*40%*	164	174	185	211	236	266	298
Government	*35%*	61	67	72	82	91	103	115
Total	*28%*	2,710	3,033	3,240	3,689	4,124	4,648	5,204
Cumulative from 2009		-	323	530	979	1,414	1,938	2,494

Table 12- 26 converts the office employment projections to land needs. The table uses the assumptions from the 2004 Johnson-Gardner report for office area per employee and floor-to-area ratio (FAR). The table also included a 15% allowance for right-of-way, utilities, and other unbuildable areas.

Table 12- 26: Office Land Needs through 2040

Industry	Office Sq. Ft. per Emp.	FAR	ROW	2009	2018	2020	2025	2030	2035	2040
Construction	*225*	*40%*	*15%*	0.1	0.2	0.2	0.2	0.3	0.3	0.3
Manufacturing	*200*	*40%*	*15%*	1.5	1.7	1.8	2.1	2.3	2.6	2.9
Wholesale Trade	*200*	*40%*	*15%*	0.0	0.1	0.1	0.1	0.1	0.1	0.1
Retail Trade	*200*	*40%*	*15%*	0.6	0.8	0.8	0.9	1.0	1.2	1.3
Transportation, Warehousing & Utilities	*225*	*40%*	*15%*	0.8	0.9	0.9	1.1	1.2	1.3	1.5
Information	*200*	*40%*	*15%*	0.5	0.7	0.7	0.8	0.9	1.0	1.2
Financial Activities	*200*	*40%*	*15%*	2.9	3.4	3.7	4.2	4.7	5.3	5.9
Professional & Business Services	*200*	*40%*	*15%*	3.9	5.8	6.2	7.0	7.8	8.8	9.9
Education & Health Services	*200*	*40%*	*15%*	17.7	17.0	18.2	20.7	23.1	26.0	29.2
Leisure & Hospitality	*200*	*40%*	*15%*	5.5	7.4	7.9	8.9	10.0	11.3	12.6
Other Services	*200*	*40%*	*15%*	2.2	2.3	2.5	2.9	3.2	3.6	4.0
Government	*200*	*40%*	*15%*	0.8	0.9	1.0	1.1	1.2	1.4	1.6
Total (Gross Buildable Acres)	*201*	*40%*	*15%*	36.7	41.1	43.9	50.0	55.9	62.9	70.5
Cumulative from 2009					4	7	13	19	26	34

Retail Land Needs

Table 12- 27 projects the need for retail land in Newberg for the 2010-2040 period. The table uses the methodology outlined in the 2004 Johnson-Gardner *Demand for Commercial & Industrial Land Report*. That report uses a five step process to determine commercial land needs:

1. Project future household growth.
2. Estimate Newberg per-household spending in a number of retail categories.
3. Project Newberg retail sales per retail category.
4. Project demand for retail space based on projected sales in each retail category.
5. Convert retail space demands into acreage needs for retail land.

The result of the report's calculations is that for every 1,000 new households, there will be a need for 14.8 net buildable acres of retail land. Thus, using this simple factor, we can project future retail land needs based on the projected household growth. Household growth was updated using the 2009 population estimates for the Newberg urban area as a base.

The table also made three other adjustments to the retail land needs. First, the table includes a 15% allowance for right-of-way, utilities, and similar unbuildable land. Second, as an efficiency measure ~~and in support of efforts to promote and redevelop downtown, total commercial land needs have been reduced by 5 acres, assuming~~, the table assumes that 5% of retail land needs will be met through infill ~~and~~ or redevelopment ~~will occur in the downtown core~~of existing commercial land, such as in downtown Newberg. Third, the table includes an allowance for one acre of commercial land inside the UGB estimated to be displaced by construction of the Newberg-Dundee Bypass.

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Table 12- 27: Retail Land Needs through 2040

Category	2009	2015	2020	2025	2030	2035	2040
Population	23,582	28,559	33,683	38,352	42,870	48,316	54,097
Households[53]	7,799	9,445	11,140	12,684	14,178	15,980	17,892
New Households (from previous column)	-	1,646	1,695	1,544	1,494	1,801	1,912
Net Buildable Acres per 1,000 households	-	14.8	14.8	14.8	14.8	14.8	14.8
Right-of-Way	-	15%	15%	15%	15%	15%	15%
Infill/Redevelopment	-	(5%)	(5%)	(5%)	(5%)	(5%)	(5%)
Displaced by Bypass	-	-	-	1	-	-	-
Total Gross Buildable Acres Needed	-	27	28	25	25	30	31
Cumulative from 2009	-	27	55	80	105	135	166

Total Commercial Land ~~Need~~Needs

Table 12- 28 below sums the office land needs projected in Table 12- 26 on page 54 and the retail land need projected in Table 12- 27 on page 55 to yield total commercial land needs. These land needs are categorized by the 2010-2030 timeframe, and by the 2031-2040 timeframe.

Table 12- 28: Commercial Land Needs, 2010-2040

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Type	2010-2030	2031-2040
Office	~~20~~19 ac	~~17~~15 ac
Retail	~~101~~105 ac	~~51~~61 ac
Total	~~121~~124 ac	~~68~~76 ac

~~Source: Johnson Gardner, *Industrial & Office Land Need Methodology*, Newberg Planning~~

[53] Projected population was converted to projected households using a conversion factor of 3.024 population per household. This factor was determined using the 2007 Census population estimate for Newberg city of 22,541, and dividing it by the 2006-2008 American Community Survey estimate of 7,455 households. Note that this factor is different than the 2006-2008 ACS estimated population per household of 2.7, because total population includes non-households.

~~Division information on development 2005-2009. Numbers include 1 acre of commercial displaced by future Bypass construction.~~Note: All acreages are gross buildable acres.

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Commercial Site Requirements

In 2004-05, Newberg prepared the *Report to Newberg City Council; Recommendations for Newberg's Future*, which documented the development form necessary to accommodate identified commercial land needs. As can be seen, most of the commercial growth is expected to occur within Newberg's existing commercial areas. Newberg has many commercial opportunities in its downtown core. The Newberg Downtown Revitalization Committee is actively working on projects to revitalize the downtown commercial core, including the addition of a new downtown gateway sign, a downtown demonstration block, and efforts to publicize available public parking areas. There is currently approximately 1 buildable acre in the downtown core; however, it can be assumed that redevelopment, infill, and intensification of uses in the downtown core and other commercial areas will contribute an additional 5~~ total acres~~% of buildable land supply through 2040.

In addition, Newberg will need to provide large parcels for shopping centers. The Urban Land Institute has identified three types of shopping centers that potentially could be developed in communities such as Newberg: neighborhood centers, community centers and regional centers. A large regional shopping center is not consistent with Newberg's desire to maintain a small town feeling and have a complete community rather than a bedroom suburb; therefore, smaller neighborhood and community shopping centers are preferred.

Newberg needs to ensure that there is an adequate supply of sites with appropriate characteristics for smaller neighborhood and community shopping centers in terms of size, access, and location. Under this approach, future land needs will include needs for 2-3 community centers (10-15 acres each) and 2-3 smaller neighborhood centers (3-5 acres) through 2040. The smaller neighborhood commercial centers should be scattered throughout the community to provide goods and services near where people live and reduce the need to drive into the central area for basic needs.

Table 12- 29: Required Commercial Site Suitability Characteristics

Required Site Characteristic	Description
Site Size	• For neighborhood centers – 3 acres minimum • For community centers – 10 acre minimum No more than two separate ownerships
Topography	Exclude: • Slopes of 10% or greater • Inventoried and protected riparian corridors / wetlands • Areas within the designated Stream Corridor Overlay (which include the 100-year floodplain) • Remaining suitable area contiguous and generally rectangular in shape to enable efficient development
Proximity to Transportation and Services	• For neighborhood centers – access to major collector or minor arterial street at a minimum. • For community centers – access to minor or major arterial.
Compatibility	Exclude sites that: • For community centers, abut residential neighborhood on more than 50% of the site perimeter unless effective topographical or road buffers present or planned

Commercial Land and Sites

The commercial buildable land inventory inside the 2009 Newberg UGB has approximately 120 buildable acres. Newberg has seven main commercial areas. These are shown on Figure 12- 4 on page 59. Table 12- 30 shows the location and amount of buildable land in each area.

Table 12- 30: Buildable Commercial Land in Newberg UGB (2009)

Location	Potential Uses	Buildable Acres	Parcels over 5 Acres Buildable
Downtown	Infill Retail and Office Uses	1	0
College/Mountainview Neighborhood Center	Neighborhood or Community Commercial Center	12	1
Springbrook Hospitality and Village	Tourist Retail and Hospitality	25	2
East Portland Road	Community Commercial Center	28	2
Portland Road	Retail and Office	19	1
Riverfront	Tourist Retail and Hospitality	10	0
Providence Drive	Medical Offices	25	2
Total		**120**	**8**

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2030 Commercial Site Need and Supply

Overall, Newberg has nearly an adequate supply of commercial land to meet needs through 2030. The overall land supply is weighted toward medical office land (Providence Drive) and tourist commercial land (Springbrook and Riverfront), and less toward general retail land. There is land for two community commercial centers. There is an overall deficit of ~~6~~10 acres of retail commercial land.

Table 12- 31: Commercial Land Supply and Need

Type	Buildable Acres Needed 2010-2030	~~Land~~Buildable Acres in 2009 UGB	Surplus or (Deficit)	Buildable Acres Needed 2031-2040
Office	~~20~~19	25	~~5~~6	~~17~~15
Retail	~~101~~105	95	(~~6~~)10)	~~51~~61
Total	~~121~~124	120	(~~1~~)4)	~~68~~76

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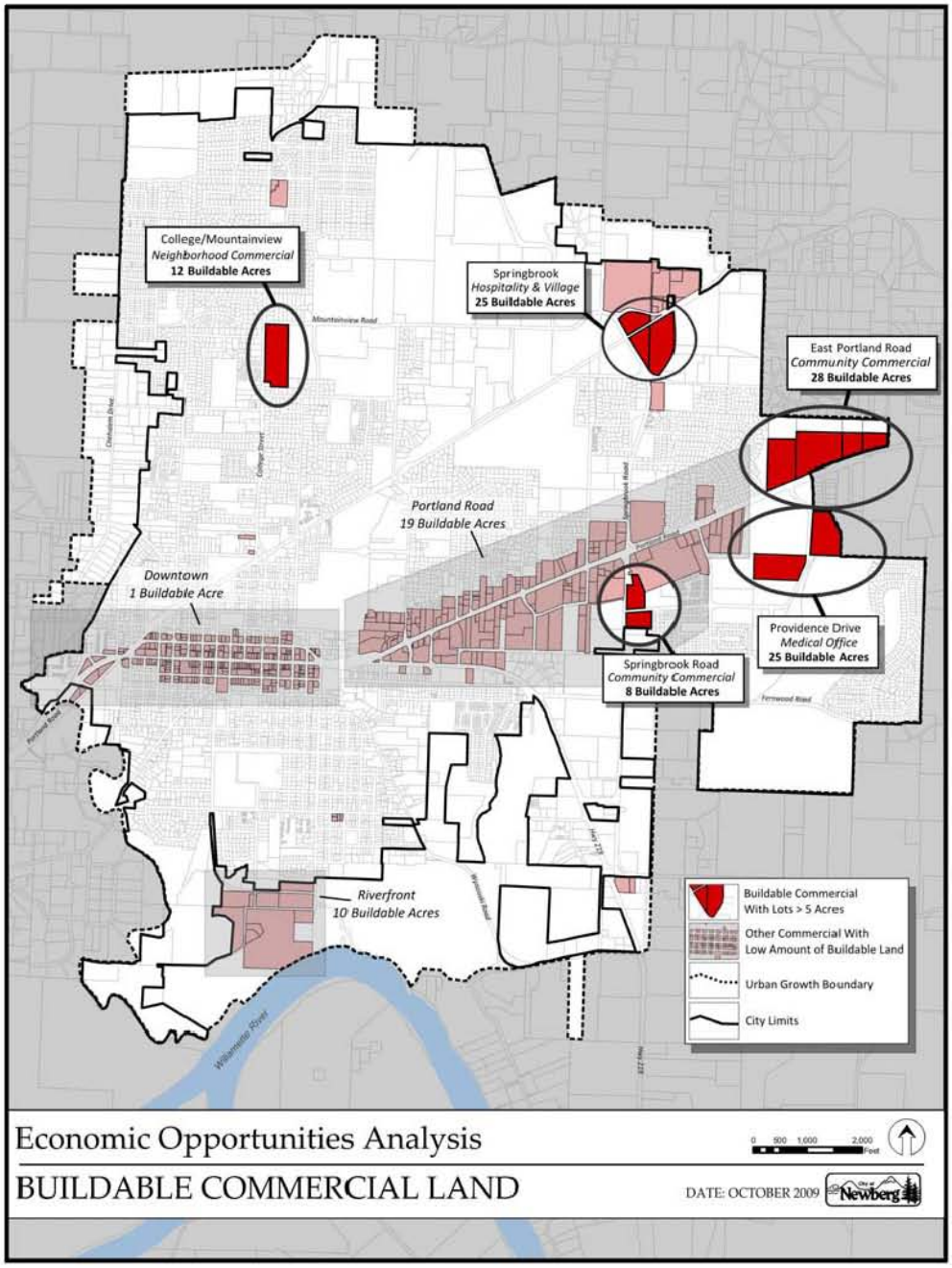
~~Source: Newberg's Ad Hoc Committee on Newberg's Future, Newberg Planning Division~~

Note: All figures are gross buildable acres.

There is a need for ~~68~~76 buildable acres for the time period from 2031-2040. There is a built in assumption that approximately 5 ~~acres~~percent of the commercial land need will be made up by downtown redevelopment and infill. The remainder of the future commercial land supply should include an additional community commercial center and 2-3 neighborhood commercial centers.

Figure 12- 4: Commercial Areas and Buildable Commercial Land, Newberg UGB 2009



VI. Conclusion

Newberg's economic base has diversified over time and several of its home-grown industries have become national and international leaders in their respective fields. The City is slowly transitioning into more of an urban center for east Yamhill County as the population grows. However, Newberg citizens have made it clear that they value the "live here, work here, shop here" values and way of life. To keep up the City's commitment to the values of its residents, Newberg must strengthen its economic base and provide adequate industrial and commercial land for current and future populations.

The industrial and commercial buildable land supply tables in this report indicate a shortage of both types of land within the current Newberg Urban Growth Boundary. It is critical for economic development efforts to have adequate buildable land available that meets the identified site suitability requirements for both industrial and commercial areas. The City cannot help provide enough jobs for current and future residents without adequate land to locate new businesses on, and without adequate land for existing businesses to expand onto.

Fortunately, Newberg has many advantages that make it stand out in the regional marketplace, including the following:

- Small town quality of life
- Access to quality education and skills training
- Strong established and growing industry clusters
- Strong local support for business and employment opportunities
- Proximity to the Portland Metropolitan Region
- Future Newberg-Dundee Bypass
- Compliance with Oregon's statewide planning goals

In addition, Newberg has easy access to Interstate 5 on its south side for easy access to industrial locations. One of the most important advantages on the list is that Newberg has strong existing and growing industry clusters in the areas of manufacturing, health care, higher education, and wine tourism. Providing additional adequate land for industrial and commercial businesses that are in these same sectors and other compatible sectors will help strengthen Newberg's economic base for the future.

By following the recommended actions in the plan, Newberg can maintain and build a strong economic base to benefit all its citizens.

JOHNSON GARDNER

INDUSTRIAL & OFFICE LAND NEED METHODOLOGY

Demand for industrial and office land is a direct function of employment growth in industrial sectors that occupy these type of space. As a result, our projections of industrial and office demand are based on forecasted employment growth by industrial sector within the City of Newberg. Methodology for forecasting need for industrial and office land follow a standard, multi-step process, summarized below.

STEP 1: EMPLOYMENT GROWTH FORECAST

Johnson Gardner forecast employment growth by industry for the City of Newberg through 2025 and 2040 based on Newberg data provided to Johnson Gardner by the State of Oregon Employment Department and Yamhill County employment data generally available from the Oregon Employment Department. Three employment growth scenarios were estimated for the City of Newberg for sensitivity analysis purposes: Medium Growth, Low Growth and High Growth.

- Medium Growth Scenario: Assumes employment growth rates for Yamhill County industries estimated by Oregon Employment Department converted to NAICS by Johnson Gardner, LLC.
- High Growth Scenario: Assumes employment growth rates for Yamhill County industries estimated in the Regional Industrial Land Study Phase II (Otak, Inc., et al, 1999) report converted to NAICS by Johnson Gardner.
- Low Growth Scenario: Assumes employment growth rates for Yamhill County 20% slower than those in the Medium Growth Scenario.

Over a longer time span, Newberg's economy can be expected to experience changes in its industry composition. To model the likelihood of these changes, Johnson Gardner further assumed Newberg's share by industry of Yamhill County employment would change at similar rates exhibited between 1990 and 2000 as measured by Oregon Employment Department.

STEP 2A: DEMAND FOR INDUSTRIAL BUILDING SPACE

Newberg sectoral employment growth for each of the three economic scenarios is converted into growth in industrial employment based on typical percentages of employment by sector that will be located in industrial space. Employment is then further stratified by type of space, including warehouse/distribution, general industrial and high-tech/flex space. Finally, employment density ratios, calculated as average square feet of space necessary per industrial job, were utilized to calculate total space demand by industrial space type given projected employment growth. These ratios and densities are based on industry standards from the aforementioned *Regional Industrial Land Study*.

STEP 2B: DEMAND FOR INDUSTRIAL LAND

Demand for industrial land is a conversion of demand for space by floor area ratios (FARs) by industrial development type and the addition of non-industrial use demand for industrial land typical of business park space. Projections utilize the following FARs from the *Regional Industrial Lands Study*:

- *Warehouse/Distribution:* 0.31
- *General Industrial:* 0.30; and
- *High-Tech/Flex:* 0.26.

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Second, a 20% non-industrial use demand for land was assumed for industrial land projections as implemented in the Regional Industrial Lands Study.

STEP 3A: DEMAND FOR OFFICE BUILDING SPACE

Sector employment growth for each of the three economic scenarios (Step 1) is converted into growth in office employment based on typical percentages of jobs, or capture factors, by sector that will be located in office development rather than industrial development. Employment density ratios, the average space in square feet necessary per office job, were utilized to calculate total office space demand given projected employment growth. Ratios and densities utilized are from the Urban Land Institute.

STEP 3B: DEMAND FOR OFFICE LAND

Like industrial land need, demand for office land is a conversion of demand for space by an office floor area ratio (FAR). For projections under each of the three Newberg economic scenarios, Johnson Gardner assumed the industry-standard 0.40 FAR.

RETAIL COMMERCIAL LAND NEED METHODOLOGY

Unlike industrial and office land need, retail land need is a direct function of household moving into Newberg and typical spending patterns by those households. Methodology for forecasting retail commercial land need is summarized below.

STEP 1: HOUSEHOLD GROWTH PROJECTIONS

For modeling growth in retail commercial land need, Johnson Gardner simply utilized household growth projections found in the Residential Land Needs forecasts. Medium, high and low growth scenarios, and resulting household population forecasts through 2040, were used accordingly.

STEP 2: ESTIMATE NEWBERG PER-HOUSEHOLD RETAIL SPENDING

JOHNSON GARDNER estimated per-household annual spending by retail category utilizing data from Claritas, Incorporated, the national industry-leading retail statistics data provider. Categories are as detailed in the following table by the North American Industry Classification System (NAICS).

NAICS	Category	Per Household Expenditures
4413	Automotive Parts, Accessories and Tire Stores	$5,501
442	Furniture and Home Furnishings Stores	$861
443	Electronics and Appliance Stores	$2,181
444	Building Materials and Garden Equipment	$875
445	Food and Beverage Stores	$6,910
446	Health and Personal Care Stores	$1,897
448	Clothing and Clothing Accessories Stores	$3,756
451	Sporting Goods, Hobby, Book and Music Stores	$1,904
452	General Merchandise Stores	$1,160
453	Miscellaneous Store Retailers	$715
722	Foodservices and Drinking Places	$3,458
	Totals/Weighted Averages	**$29,218**

STEP 3: ESTIMATE FUTURE NEWBERG RETAIL SALES

Future retail sales in Newberg were simply calculated as the product of future Newberg household counts under the medium, high, and low growth scenarios through 2040 and annual average retail sales by category estimated in Step 2.

STEP 4: DEMAND FOR RETAIL BUILDING SPACE

Future retail sales are converted into need for developed retail space by calculating the product of future Newberg retail sales by category to a category-specific Sales Support Factor. The Sales Support Factor is the national average retail sales per square foot of space for each category of retail. Sales support factors are from the Urban Land Institute publication *Dollars & Cents*. Sales Support Factors are summarized below.

NAICS	Category	Sales Support Factor
4413	Automotive Parts, Accessories and Tire Stores	$139
442	Furniture and Home Furnishings Stores	$173
443	Electronics and Appliance Stores	$200
444	Building Materials and Garden Equipment	$128
445	Food and Beverage Stores	$312
446	Health and Personal Care Stores	$230
448	Clothing and Clothing Accessories Stores	$217
451	Sporting Goods, Hobby, Book and Music Stores	$195
452	General Merchandise Stores	$139
453	Miscellaneous Store Retailers	$192
722	Foodservices and Drinking Places	$236
	Totals/Weighted Averages	

STEP 5: DEMAND FOR RETAIL COMMERCIAL LAND

Demand estimates for developed retail space at different time points was then converted into demand for retail commercial land by applying the industry-standard retail Floor Area Ratio (FAR) of 0.25. The FAR assumes standard suburban retail space requiring one parking space per 1,000 square feet of retail floor area.

SUMMARY OF INDUSTRIAL AND COMMERCIAL LAND NEED FINDINGS

Resulting calculations for the methodologies described above are summarized in the following table. Projections of net new demand in Newberg for commercial and industrial land between 2004 and 2025, as well as longer-term demand from 2004 to 2040 are detailed.

Through 2025, net new demand for industrial and commercial land is estimated to range from 117.5 acres to 273.5 acres depending upon whether Newberg realizes low economic growth or high economic growth. The baseline "Medium Growth Scenario" indicates that Newberg will see demand for industrial and commercial land reach nearly 146 acres through 2025.

Through 2040, net new demand for commercial and industrial land is estimated to reach anywhere from 209.3 acres to 509.9 acres under the "Low Growth" and "High Growth" scenarios, respectively.

Again, the "High Growth Scenario" is best summarized as greater strength in Newberg's manufacturing core, thus much greater overall demand for industrial and office space as a result. The baseline "Medium Growth Scenario" exhibits likely industrial and commercial land need in the neighborhood o f 269 acres through 2040.

NET NEW DEMAND FOR COMMERCIAL AND INDUSTRIAL LAND
NEWBERG, OREGON
2004-2025 & 2004-2040
MEDIUM, HIGH AND LOW GROWTH SCENARIOS

	Net New Demand for Land (acres) By Scenario From 2004 Through:					
	Medium Growth		High Growth		Low Growth	
Use	2025	2040	2025	2040	2025	2040
Office	14.8	27.1	20.5	37.8	13.7	24.8
Industrial	34.7	63.8	85.6	161.4	27.0	49.3
Retail	96.2	178.3	167.4	310.7	76.8	135.2
Total	**145.7**	**269.2**	**273.5**	**509.9**	**117.5**	**209.3**

SOURCE: Johnson Gardner LLC

Need for retail drives the vast majority of commercial land demand under all three scenarios. Under the "Medium Growth Scenario," retail drives the largest share (66%) followed closely under the "Low Growth Scenario" at 65% of need. Retail, though still the majority of demand, accounts for 61% of commercial and industrial land in the future with the "High Growth" assumption due to the significantly greater expected growth of manufacturing jobs under that scenario.

It is important to note that the above forecasts for industrial and commercial land need are net acreage required only for building and impervious surface space requirements. Roads, right-of-ways, parks and public facilities, among other things, necessary to serve projected land development has not been included. A gross-up factor of 25% is commonly utilized by jurisdictions for planning purposes to estimate gross land need, though that would be at the discretion of The City of Newberg given its specific planning requirements.

EXHIBIT 6.01

PROJECTIONS OF OFFICE SPACE-UTILIZING EMPLOYMENT BY INDUSTRY SECTOR
NEWBERG, OREGON
2004-2024

Medium Growth Scenario	Total Employment 1/					*Industrial*	Industrial Space-Utilizing Employment					
Employment Sector	2004	2009	2014	2019	2024	*Share 2/*	2004	2009	2014	2019	2024	'04-'24
Construction	531	586	656	743	849	*2%*	11	12	13	15	17	6
Manufacturing	2,283	2,310	2,339	2,373	2,411	*5%*	114	115	117	119	121	6
Wholesale Trade	98	103	108	112	115	*5%*	5	5	5	6	6	1
Retail Trade	916	1,002	1,097	1,201	1,315	*5%*	46	50	55	60	66	20
Transportation, Warehousing & Utilities	129	141	155	170	189	*30%*	39	42	46	51	57	18
Information	44	49	55	61	68	*90%*	40	44	49	55	61	22
Financial Activities	214	230	248	267	287	*90%*	193	207	223	240	258	66
Professional & Business Services	416	464	518	577	643	*90%*	375	418	466	519	579	204
Education & Health Services	2,309	2,574	2,870	3,200	3,567	*40%*	923	1,030	1,148	1,280	1,427	504
Leisure & Hospitality	866	965	1,076	1,200	1,338	*40%*	346	386	430	480	535	189
Other Services	320	357	398	443	494	*40%*	128	143	159	177	198	70
Government	141	149	158	169	181	*35%*	49	52	55	59	63	14
Total	**8,266**	**8,930**	**9,677**	**10,516**	**11,459**	*29%*	**2,268**	**2,504**	**2,768**	**3,061**	**3,388**	**1,120**

High Growth Scenario	Total Employment 1/					*Industrial*	Industrial Space-Utilizing Employment					
Employment Sector	2004	2009	2014	2019	2024	*Share 2/*	2004	2009	2014	2019	2024	'04-'24
Construction	525	589	671	774	901	*2%*	10	12	13	15	18	8
Manufacturing	2,283	2,479	2,715	2,996	3,332	*5%*	114	124	136	150	167	52
Wholesale Trade	98	103	107	111	114	*5%*	5	5	5	6	6	1
Retail Trade	916	978	1,045	1,116	1,192	*5%*	46	49	52	56	60	14
Transportation, Warehousing & Utilities	129	141	154	170	188	*30%*	39	42	46	51	56	18
Information	44	50	56	64	72	*90%*	40	45	51	57	65	25
Financial Activities	214	225	237	250	263	*90%*	193	203	214	225	237	44
Professional & Business Services	416	470	531	600	678	*90%*	375	423	478	540	610	235
Education & Health Services	2,309	2,607	2,945	3,326	3,757	*40%*	923	1,043	1,178	1,331	1,503	579
Leisure & Hospitality	866	978	1,104	1,247	1,409	*40%*	346	391	442	499	563	217
Other Services	320	361	408	461	521	*40%*	128	145	163	184	208	80
Government	141	155	172	193	219	*35%*	49	54	60	68	77	27
Total	**8,259**	**9,137**	**10,146**	**11,308**	**12,646**	*28%*	**2,268**	**2,536**	**2,839**	**3,181**	**3,569**	**1,301**

Slow Growth Scenario	Total Employment 1/					*Industrial*	Industrial Space-Utilizing Employment					
Employment Sector	2004	2009	2014	2019	2024	*Share 2/*	2004	2009	2014	2019	2024	'04-'24
Construction	534	578	633	701	781	*2%*	11	12	13	14	16	5
Manufacturing	2,278	2,299	2,323	2,349	2,379	*5%*	114	115	116	117	119	5
Wholesale Trade	98	102	106	109	112	*5%*	5	5	5	5	6	1
Retail Trade	923	992	1,066	1,147	1,233	*5%*	46	50	53	57	62	16
Transportation, Warehousing & Utilities	130	139	150	162	176	*30%*	39	42	45	49	53	14
Information	45	49	53	58	63	*90%*	40	44	48	52	57	17
Financial Activities	215	228	242	257	272	*90%*	194	205	218	231	245	52
Professional & Business Services	420	459	501	546	596	*90%*	378	413	450	492	536	158
Education & Health Services	2,331	2,543	2,775	3,028	3,304	*40%*	932	1,017	1,110	1,211	1,322	389
Leisure & Hospitality	874	954	1,041	1,135	1,239	*40%*	350	381	416	454	496	146
Other Services	323	353	385	420	458	*40%*	129	141	154	168	183	54
Government	141	147	154	163	173	*35%*	49	52	54	57	61	11
Total	**8,311**	**8,843**	**9,429**	**10,075**	**10,788**	*28%*	**2,287**	**2,476**	**2,683**	**2,908**	**3,154**	**867**

Medium Growth Scenario: Assumes employment growth rates for Yamhill County industries estimated by Oregon Employment Department converted to NAICS by Johnson Gardner, LLC.
High Growth Scenario: Assumes employment growth rates for Yamhill County industries estimated in the Regional Industrial Land Study Phase II (Otak, Inc., et al, 1999) report converted to NAICS by Johnson Garder, LLC
Low Growth Scenario: Assumes employment growth rates for Yamhill County 20% slower than those in the Medium Growth Scenario.
1/ Newberg payroll employment growth for each sector is based on projected Yamhill County growth assuming a City capture rate for each industry. Capture rates adjust annually based on changes in local payroll employment capture recorded from 1994 to 2002.
2/ Share of industry employment that utilizes office space. From the Urban Land Institute converted to NAICS by Johnson Gardner, LLC.

EXHIBIT 6.02

DEMAND PROJECTIONS FOR COMMERCIAL OFFICE SPACE BY INDUSTRY SECTOR
NEWBERG, OREGON
2004-2024

Medium Growth Scenario	Newberg Jobs in Office Space 1/						Avg. Space	Projected Office Space Need 3/					
Employment Sector	2004	2009	2014	2019	2024	'04-'24	Per Job 2/	2004	2009	2014	2019	2024	'04-'24
Construction	11	12	13	15	17	6	225	2,627	2,902	3,249	3,678	4,200	1,573
Manufacturing	114	115	117	119	121	6	200	25,112	25,405	25,734	26,105	26,522	1,410
Wholesale Trade	5	5	5	6	6	1	200	1,073	1,132	1,183	1,228	1,268	195
Retail Trade	46	50	55	60	66	20	200	10,080	11,027	12,068	13,212	14,468	4,388
Transportation, Warehousing & Utilities	39	42	46	51	57	18	225	9,551	10,451	11,481	12,657	14,002	4,451
Information	40	44	49	55	61	22	200	8,732	9,735	10,855	12,102	13,493	4,762
Financial Activities	193	207	223	240	258	66	200	42,350	45,605	49,097	52,844	56,863	14,513
Professional & Business Services	375	418	466	519	579	204	200	82,444	91,921	102,487	114,268	127,402	44,958
Education & Health Services	923	1,030	1,148	1,280	1,427	504	200	203,154	226,507	252,543	281,572	313,938	110,784
Leisure & Hospitality	346	386	430	480	535	189	200	76,172	84,927	94,690	105,574	117,709	41,538
Other Services	128	143	159	177	198	70	200	28,158	31,395	35,004	39,027	43,513	15,355
Government	49	52	55	59	63	14	200	10,843	11,436	12,140	12,975	13,966	3,123
Total	**2,268**	**2,504**	**2,768**	**3,061**	**3,388**	**1,120**	**201**	**500,297**	**552,443**	**610,529**	**675,242**	**747,348**	**247,051**

High Growth Scenario	Newberg Jobs in Office Space 1/						Avg. Space	Projected Office Space Need 3/					
Employment Sector	2004	2009	2014	2019	2024	'04-'24	Per Job 2/	2004	2009	2014	2019	2024	04-'24
Construction	10	12	13	15	18	8	225	2,597	2,915	3,323	3,832	4,460	1,863
Manufacturing	114	124	136	150	167	52	200	25,112	27,274	29,861	32,955	36,655	11,543
Wholesale Trade	5	5	5	6	6	1	200	1,073	1,128	1,176	1,218	1,254	181
Retail Trade	46	49	52	56	60	14	200	10,080	10,761	11,491	12,274	13,114	3,034
Transportation, Warehousing & Utilities	39	42	46	51	56	18	225	9,551	10,441	11,458	12,619	13,945	4,394
Information	40	45	51	57	65	25	200	8,732	9,862	11,139	12,582	14,211	5,479
Financial Activities	193	203	214	225	237	44	200	42,350	44,620	47,002	49,503	52,128	9,777
Professional & Business Services	375	423	478	540	610	235	200	82,444	93,119	105,176	118,794	134,175	51,731
Education & Health Services	923	1,043	1,178	1,331	1,503	579	200	203,154	229,459	259,169	292,726	330,628	127,473
Leisure & Hospitality	346	391	442	499	563	217	200	76,172	86,034	97,174	109,756	123,967	47,795
Other Services	128	145	163	184	208	80	200	28,158	31,804	35,922	40,573	45,827	17,668
Government	49	54	60	68	77	27	200	10,843	11,918	13,240	14,865	16,862	6,019
Total	**2,268**	**2,536**	**2,839**	**3,181**	**3,569**	**1,301**	**201**	**500,267**	**559,337**	**626,131**	**701,696**	**787,226**	**286,959**

Slow Growth Scenario	Newberg Jobs in Office Space 1/						Avg. Space	Projected Office Space Need 3/					
Employment Sector	2004	2009	2014	2019	2024	'04-'24	Per Job 2/	2004	2009	2014	2019	2024	'04-'24
Construction	11	12	13	14	16	5	225	2,643	2,862	3,136	3,469	3,867	1,225
Manufacturing	114	115	116	117	119	5	200	25,053	25,286	25,549	25,843	26,174	1,121
Wholesale Trade	5	5	5	5	6	1	200	1,078	1,125	1,166	1,201	1,231	153
Retail Trade	46	50	53	57	62	16	200	10,154	10,911	11,729	12,613	13,566	3,412
Transportation, Warehousing & Utilities	39	42	45	49	53	14	225	9,616	10,336	11,145	12,055	13,078	3,463
Information	40	44	48	52	57	17	200	8,816	9,620	10,497	11,454	12,498	3,681
Financial Activities	194	205	218	231	245	52	200	42,583	45,185	47,936	50,844	53,919	11,336
Professional & Business Services	378	413	450	492	536	158	200	83,243	90,830	99,110	108,144	118,001	34,759
Education & Health Services	932	1,017	1,110	1,211	1,322	389	200	205,122	223,819	244,221	266,483	290,773	85,651
Leisure & Hospitality	350	381	416	454	496	146	200	76,909	83,920	91,569	99,916	109,024	32,114
Other Services	129	141	154	168	183	54	200	28,431	31,023	33,850	36,936	40,303	11,872
Government	49	52	54	57	61	11	200	10,864	11,337	11,894	12,549	13,320	2,456
Total	**2,287**	**2,476**	**2,683**	**2,908**	**3,154**	**867**	**201**	**504,510**	**546,255**	**591,802**	**641,506**	**695,755**	**191,244**

1/ From EXHIBIT X.
2/ Average office employment density by industry sector from the Urban Land Institute converted to NAICS by Johnson Gardner, LLC.
3/ Assumes a market-clearing 10% office space vacancy rate.

EXHIBIT 6.03

DEMAND PROJECTIONS FOR COMMERCIAL OFFICE LAND BY INDUSTRY SECTOR
NEWBERG, OREGON
2004-2024

Medium Growth Scenario	Newberg Office Space Need 1/						*Floor to*	Predicted Land Need (acres)					
Employment Sector	2004	2009	2014	2019	2024	'04-'24	*Area Ratio*	2004	2009	2014	2019	2024	*'04-'24*
Construction	2,627	2,902	3,249	3,678	4,200	1,573	*0.40*	0.2	0.2	0.2	0.2	0.2	*0.1*
Manufacturing	25,112	25,405	25,734	26,105	26,522	1,410	*0.40*	1.4	1.5	1.5	1.5	1.5	*0.1*
Wholesale Trade	1,073	1,132	1,183	1,228	1,268	195	*0.40*	0.1	0.1	0.1	0.1	0.1	*0.0*
Retail Trade	10,080	11,027	12,068	13,212	14,468	4,388	*0.40*	0.6	0.6	0.7	0.8	0.8	*0.3*
Transportation, Warehousing & Utilitie	9,551	10,451	11,481	12,657	14,002	4,451	*0.40*	0.5	0.6	0.7	0.7	0.8	*0.3*
Information	8,732	9,735	10,855	12,102	13,493	4,762	*0.40*	0.5	0.6	0.6	0.7	0.8	*0.3*
Financial Activities	42,350	45,605	49,097	52,844	56,863	14,513	*0.40*	2.4	2.6	2.8	3.0	3.3	*0.8*
Professional & Business Services	82,444	91,921	102,487	114,268	127,402	44,958	*0.40*	4.7	5.3	5.9	6.6	7.3	*2.6*
Education & Health Services	203,154	226,507	252,543	281,572	313,938	110,784	*0.40*	11.7	13.0	14.5	16.2	18.0	*6.4*
Leisure & Hospitality	76,172	84,927	94,690	105,574	117,709	41,538	*0.40*	4.4	4.9	5.4	6.1	6.8	*2.4*
Other Services	28,158	31,395	35,004	39,027	43,513	15,355	*0.40*	1.6	1.8	2.0	2.2	2.5	*0.9*
Total/Weighted Average	**489,454**	**541,007**	**598,390**	**662,267**	**733,382**	**243,928**	*0.40*	**28.1**	**31.0**	**34.3**	**38.0**	**42.1**	*14.0*

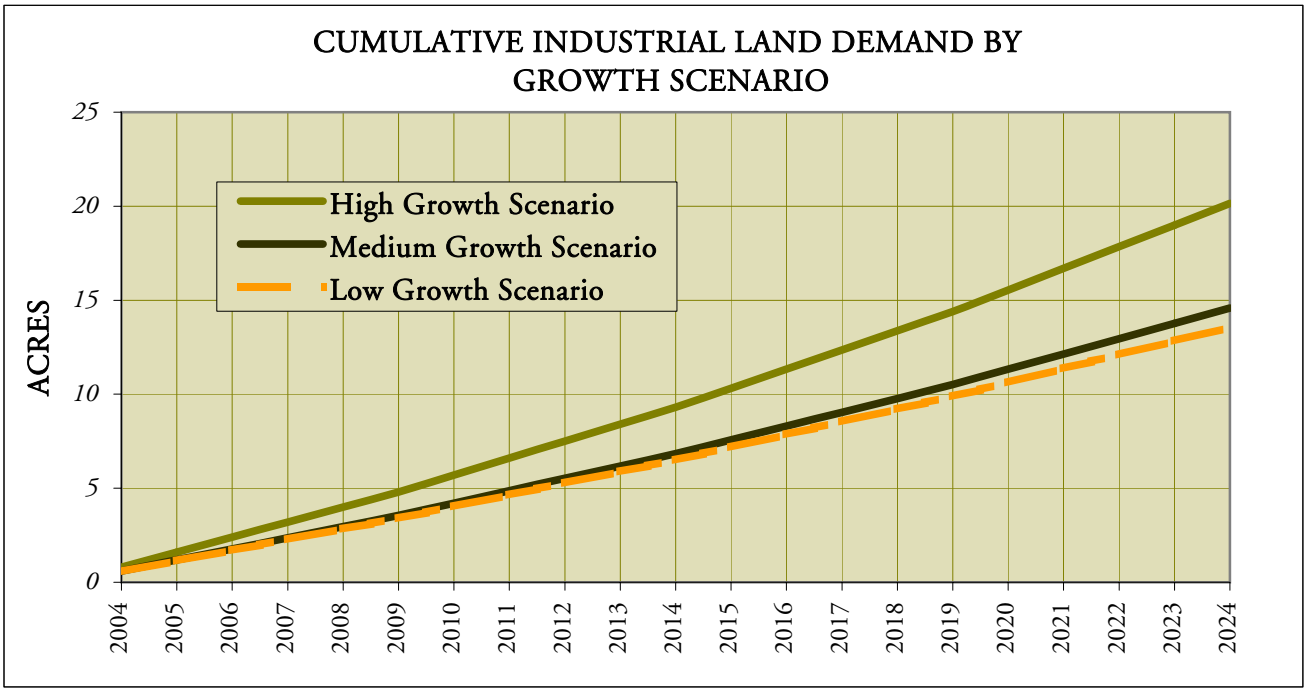
High Growth Scenario	Newberg Office Space Need 1/						*Floor to*	Predicted Land Need (acres)					
Employment Sector	2004	2009	2014	2019	2024	'04-'24	*Area Ratio*	2004	2009	2014	2019	2024	*'04-'24*
Construction	2,597	2,915	3,323	3,832	4,460	1,863	*0.40*	0.2	0.2	0.2	0.3	0.3	*0.1*
Manufacturing	25,112	27,274	29,861	32,955	36,655	11,543	*0.40*	1.7	1.9	2.1	2.3	2.5	*0.8*
Wholesale Trade	1,073	1,128	1,176	1,218	1,254	181	*0.40*	0.1	0.1	0.1	0.1	0.1	*0.0*
Retail Trade	10,080	10,761	11,491	12,274	13,114	3,034	*0.40*	0.7	0.7	0.8	0.8	0.9	*0.2*
Transportation, Warehousing & Utilitie	9,551	10,441	11,458	12,619	13,945	4,394	*0.40*	0.7	0.7	0.8	0.9	1.0	*0.3*
Information	8,732	9,862	11,139	12,582	14,211	5,479	*0.40*	0.6	0.7	0.8	0.9	1.0	*0.4*
Financial Activities	42,350	44,620	47,002	49,503	52,128	9,777	*0.40*	2.9	3.1	3.2	3.4	3.6	*0.7*
Professional & Business Services	82,444	93,119	105,176	118,794	134,175	51,731	*0.40*	5.7	6.4	7.2	8.2	9.2	*3.6*
Education & Health Services	203,154	229,459	259,169	292,726	330,628	127,473	*0.40*	14.0	15.8	17.8	20.2	22.8	*8.8*
Leisure & Hospitality	76,172	86,034	97,174	109,756	123,967	47,795	*0.40*	5.2	5.9	6.7	7.6	8.5	*3.3*
Other Services	28,158	31,804	35,922	40,573	45,827	17,668	*0.40*	1.9	2.2	2.5	2.8	3.2	*1.2*
Total	**489,424**	**547,418**	**612,891**	**686,832**	**770,364**	**280,940**	*0.40*	**33.7**	**37.7**	**42.2**	**47.3**	**53.1**	*19.3*

Slow Growth Scenario	Newberg Office Space Need 1/						*Floor to*	Predicted Land Need (acres)					
Employment Sector	2004	2009	2014	2019	2024	'04-'24	*Area Ratio*	2004	2009	2014	2019	2024	*'04-'24*
Construction	2,643	2,862	3,136	3,469	3,867	1,225	*0.40*	0.2	0.2	0.2	0.2	0.3	*0.1*
Manufacturing	25,053	25,286	25,549	25,843	26,174	1,121	*0.40*	1.7	1.7	1.8	1.8	1.8	*0.1*
Wholesale Trade	1,078	1,125	1,166	1,201	1,231	153	*0.40*	0.1	0.1	0.1	0.1	0.1	*0.0*
Retail Trade	10,154	10,911	11,729	12,613	13,566	3,412	*0.40*	0.7	0.8	0.8	0.9	0.9	*0.2*
Transportation, Warehousing & Utilitie	9,616	10,336	11,145	12,055	13,078	3,463	*0.40*	0.7	0.7	0.8	0.8	0.9	*0.2*
Information	8,816	9,620	10,497	11,454	12,498	3,681	*0.40*	0.6	0.7	0.7	0.8	0.9	*0.3*
Financial Activities	42,583	45,185	47,936	50,844	53,919	11,336	*0.40*	2.9	3.1	3.3	3.5	3.7	*0.8*
Professional & Business Services	83,243	90,830	99,110	108,144	118,001	34,759	*0.40*	5.7	6.3	6.8	7.4	8.1	*2.4*
Education & Health Services	205,122	223,819	244,221	266,483	290,773	85,651	*0.40*	14.1	15.4	16.8	18.4	20.0	*5.9*
Leisure & Hospitality	76,909	83,920	91,569	99,916	109,024	32,114	*0.40*	5.3	5.8	6.3	6.9	7.5	*2.2*
Other Services	28,431	31,023	33,850	36,936	40,303	11,872	*0.40*	2.0	2.1	2.3	2.5	2.8	*0.8*
Total	**493,647**	**534,918**	**579,908**	**628,957**	**682,435**	**188,788**	*0.40*	**34.0**	**36.8**	**39.9**	**43.3**	**47.0**	*13.0*

1/ From EXHIBIT Z.

EXHIBIT 6.04

COMPARISON OF CUMULATIVE DEMAND FOR INDUSTRIAL LAND
MEDIUM, HIGH AND LOW EMPLOYMENT GROWTH SCENARIOS
2004-2024



SOURCE: Johnson Gardner, LLC

EXHIBIT 6.05

PROJECTIONS OF INDUSTRIAL SPACE-UTILIZING EMPLOYMENT BY INDUSTRY SECTOR
NEWBERG, OREGON
2004-2024

Medium Growth Scenario	Total Employment 1/					*Industrial*	Industrial Space-Utilizing Employment					
Employment Sector	2004	2009	2014	2019	2024	*Share 2/*	2004	2009	2014	2019	2024	'04-'24
Construction	531	586	656	743	849	*30%*	159	176	197	223	255	95
Manufacturing	2,283	2,310	2,339	2,373	2,411	*91%*	2,077	2,102	2,129	2,160	2,194	117
Wholesale Trade	98	103	108	112	115	*82%*	80	84	88	92	95	15
Retail Trade	916	1,002	1,097	1,201	1,315	*0%*	0	0	0	0	0	0
Transportation, Warehousing & Utilities	129	141	155	170	189	*93%*	120	131	144	159	175	56
Information	44	49	55	61	68	*88%*	39	43	48	54	60	21
Financial Activities	214	230	248	267	287	*0%*	0	0	0	0	0	0
Professional & Business Services	416	464	518	577	643	*18%*	75	84	93	104	116	41
Education & Health Services	2,309	2,574	2,870	3,200	3,567	*0%*	0	0	0	0	0	0
Leisure & Hospitality	866	965	1,076	1,200	1,338	*0%*	0	0	0	0	0	0
Other Services	320	357	398	443	494	*93%*	298	332	370	412	460	162
Government	141	149	158	169	181	*35%*	49	52	55	59	63	14
Total	**8,266**	**8,930**	**9,677**	**10,516**	**11,459**	*32%*	**2,897**	**3,003**	**3,124**	**3,262**	**3,418**	**521**

High Growth Scenario	Total Employment 1/					*Industrial*	Industrial Space-Utilizing Employment					
Employment Sector	2004	2009	2014	2019	2024	*Share 2/*	2004	2009	2014	2019	2024	'04-'24
Construction	525	589	671	774	901	*30%*	157	177	201	232	270	113
Manufacturing	2,283	2,479	2,715	2,996	3,332	*91%*	2,077	2,256	2,470	2,726	3,032	955
Wholesale Trade	98	103	107	111	114	*82%*	80	84	88	91	93	13
Retail Trade	916	978	1,045	1,116	1,192	*0%*	0	0	0	0	0	0
Transportation, Warehousing & Utilities	129	141	154	170	188	*93%*	120	131	144	158	175	55
Information	44	50	56	64	72	*88%*	39	44	50	56	63	24
Financial Activities	214	225	237	250	263	*0%*	0	0	0	0	0	0
Professional & Business Services	416	470	531	600	678	*18%*	75	85	96	108	122	47
Education & Health Services	2,309	2,607	2,945	3,326	3,757	*0%*	0	0	0	0	0	0
Leisure & Hospitality	866	978	1,104	1,247	1,409	*0%*	0	0	0	0	0	0
Other Services	320	361	408	461	521	*93%*	298	336	380	429	484	187
Government	141	155	172	193	219	*35%*	49	54	60	68	77	27
Total	**8,259**	**9,137**	**10,146**	**11,308**	**12,646**	*34%*	**2,895**	**3,167**	**3,488**	**3,868**	**4,317**	**1,422**

Slow Growth Scenario	Total Employment 1/					*Industrial*	Industrial Space-Utilizing Employment					
Employment Sector	2004	2009	2014	2019	2024	*Share 2/*	2004	2009	2014	2019	2024	'04-'24
Construction	534	578	633	701	781	*30%*	160	173	190	210	234	74
Manufacturing	2,278	2,299	2,323	2,349	2,379	*91%*	2,073	2,092	2,114	2,138	2,165	93
Wholesale Trade	98	102	106	109	112	*82%*	80	84	87	90	92	11
Retail Trade	923	992	1,066	1,147	1,233	*0%*	0	0	0	0	0	0
Transportation, Warehousing & Utilities	130	139	150	162	176	*93%*	120	129	140	151	164	43
Information	45	49	53	58	63	*88%*	39	43	47	51	56	16
Financial Activities	215	228	242	257	272	*0%*	0	0	0	0	0	0
Professional & Business Services	420	459	501	546	596	*18%*	76	83	90	98	107	32
Education & Health Services	2,331	2,543	2,775	3,028	3,304	*0%*	0	0	0	0	0	0
Leisure & Hospitality	874	954	1,041	1,135	1,239	*0%*	0	0	0	0	0	0
Other Services	323	353	385	420	458	*93%*	300	328	358	390	426	125
Government	141	147	154	163	173	*35%*	49	52	54	57	61	11
Total	**8,311**	**8,843**	**9,429**	**10,075**	**10,788**	*33%*	**2,898**	**2,983**	**3,079**	**3,185**	**3,305**	**406**

Medium Growth Scenario: Assumes employment growth rates for Yamhill County industries estimated by Oregon Employment Department converted to NAICS by Johnson Gardner, LLC.
High Growth Scenario: Assumes employment growth rates for Yamhill County industries estimated in the Regional Industrial Land Study Phase II (Otak, Inc., et al, 1999) report converted to NAICS by Johnson Garder, LLC
Low Growth Scenario: Assumes employment growth rates for Yamhill County 20% slower than those in the Medium Growth Scenario.
1/ Newberg payroll employment growth for each sector is based on projected Yamhill County growth assuming a City capture rate for each industry. Capture rates adjust annually based on changes in local payroll employment capture recorded from 1994 to 2002.
2/ Share of industry employment that utilizes industrial space. Regional Industrial Land Study Phase III (EcoNorthwest and Otak, Inc., 2001) converted to NAICS by Johnson Gardner, LLC.

EXHIBIT 6.06

INDUSTRIAL EMPLOYMENT DENSITY WORKSHEET BY INDUSTRY SECTOR
NEWBERG, OREGON
2004-2024

Industrial Space Density	Distribution by Building Type 1/			Square Feet per Job 2/			Average Space per Job			
Employment Sector	Warehouse/ Distrib.	General Industrial	Tech/ Flex	Warehouse/ Distrib.	General Industrial	Tech/ Flex	Warehouse/ Distrib.	General Industrial	Tech/ Flex	Weighted Average
Construction	0%	75%	25%	1,350	533	467	0	400	117	**517**
Manufacturing	0%	75%	25%	1,350	533	467	0	400	117	**517**
Wholesale Trade	90%	0%	10%	1,350	533	467	1,215	0	47	**1,262**
Retail Trade	0%	0%	0%	1,350	533	467	0	0	0	**0**
Transportation, Warehousing & Util	100%	0%	0%	1,350	533	467	1,350	0	0	**1,350**
Information	0%	0%	100%	1,350	533	467	0	0	467	**467**
Financial Activities	0%	0%	0%	1,350	533	467	0	0	0	**0**
Professional & Business Services	0%	0%	100%	1,350	533	467	0	0	467	**467**
Education & Health Services	0%	0%	0%	1,350	533	467	0	0	0	**0**
Leisure & Hospitality	0%	0%	0%	1,350	533	467	0	0	0	**0**
Other Services	0%	75%	25%	1,350	533	467	0	400	117	**517**
Government	0%	0%	0%	1,350	533	467	0	0	0	**0**

1/ Regional Industrial Land Study Phase II (Otak, Inc. et al, 1999) converted to NAICS by Johnson Gardner, LLC.
2/ Regional Industrial Land Study Phase III (EcoNorthwest and Otak, Inc., 2001) converted to NAICS by Johnson Gardner, LLC.

EXHIBIT 6.07

DEMAND PROJECTIONS FOR INDUSTRIAL SPACE BY INDUSTRY SECTOR
NEWBERG, OREGON
2004-2024

Medium Growth Scenario	Newberg Jobs in Industrial Space 1/						Avg. Space	Projected Industrial Space Need 3/					
Employment Sector	2004	2009	2014	2019	2024	'04-'24	Per Job 2/	2004	2009	2014	2019	2024	'04-'24
Construction	159	176	197	223	255	95	517	90,456	99,922	111,875	126,654	144,634	54,177
Manufacturing	2,077	2,102	2,129	2,160	2,194	117	517	1,180,283	1,194,056	1,209,546	1,226,968	1,246,562	66,279
Wholesale Trade	80	84	88	92	95	15	1,262	111,038	117,097	122,421	127,099	131,209	20,171
Transportation, Warehousing & Utilities	120	131	144	159	175	56	1,350	177,656	194,397	213,538	235,422	260,443	82,788
Information	39	43	48	54	60	21	467	19,936	22,227	24,782	27,631	30,807	10,871
Professional & Business Services	75	84	93	104	116	41	467	38,501	42,927	47,861	53,363	59,497	20,996
Other Services	298	332	370	412	460	162	517	169,071	188,505	210,173	234,332	261,268	92,197
Government	49	52	55	59	63	14	0	0	0	0	0	0	0
Total	**2,897**	**3,003**	**3,124**	**3,262**	**3,418**	**521**	561	**1,786,941**	**1,859,131**	**1,940,197**	**2,031,469**	**2,134,421**	347,479

High Growth Scenario	Newberg Jobs in Industrial Space 1/						Avg. Space	Projected Industrial Space Need 3/					
Employment Sector	2004	2009	2014	2019	2024	'04-'24	Per Job 2/	2004	2009	2014	2019	2024	04-'24
Construction	157	177	201	232	270	113	517	89,427	100,389	114,407	131,958	153,579	64,152
Manufacturing	2,077	2,256	2,470	2,726	3,032	955	517	1,180,283	1,281,936	1,403,516	1,548,928	1,722,843	542,560
Wholesale Trade	80	84	88	91	93	13	1,262	111,038	116,696	121,645	125,975	129,762	18,724
Transportation, Warehousing & Utilities	120	131	144	158	175	55	1,350	177,656	194,208	213,116	234,714	259,385	81,729
Information	39	44	50	56	63	24	467	19,936	22,517	25,432	28,725	32,445	12,509
Professional & Business Services	75	85	96	108	122	47	467	38,501	43,487	49,117	55,477	62,660	24,158
Other Services	298	336	380	429	484	187	517	169,071	190,962	215,688	243,615	275,158	106,087
Government	49	54	60	68	77	27	0	0	0	0	0	0	0
Total	**2,895**	**3,167**	**3,488**	**3,868**	**4,317**	**1,422**	561	**1,785,912**	**1,950,195**	**2,142,921**	**2,369,391**	**2,635,832**	849,920

Slow Growth Scenario	Newberg Jobs in Industrial Space 1/						Avg. Space	Projected Industrial Space Need 3/					
Employment Sector	2004	2009	2014	2019	2024	'04-'24	Per Job 2/	2004	2009	2014	2019	2024	'04-'24
Construction	160	173	190	210	234	74	517	90,991	98,560	107,973	119,435	133,169	42,178
Manufacturing	2,073	2,092	2,114	2,138	2,165	93	517	1,177,510	1,188,494	1,200,823	1,214,662	1,230,195	52,686
Wholesale Trade	80	84	87	90	92	11	1,262	111,572	116,415	120,613	124,250	127,403	15,831
Transportation, Warehousing & Utilities	120	129	140	151	164	43	1,350	178,849	192,241	207,297	224,226	243,260	64,410
Information	39	43	47	51	56	16	467	20,129	21,963	23,965	26,150	28,534	8,405
Professional & Business Services	76	83	90	98	107	32	467	38,874	42,418	46,284	50,503	55,107	16,232
Other Services	300	328	358	390	426	125	517	170,708	186,269	203,248	221,774	241,990	71,281
Government	49	52	54	57	61	11	0	0	0	0	0	0	0
Total	**2,898**	**2,983**	**3,079**	**3,185**	**3,305**	**406**	561	**1,788,633**	**1,846,359**	**1,910,204**	**1,981,001**	**2,059,657**	271,024

1/ From EXHIBIT X.
2/ From EXHIBIT Y.
3/ Assumes a market-clearing 10% industrial space vacancy rate.

EXHIBIT 6.08

INDUSTRIAL FLOOR-TO-AREA RATIO (FAR) WORKSHEET BY INDUSTRY SECTOR
NEWBERG, OREGON
2004-2024

Medium Growth Scenario	Distribution by Building Type 1/			FAR by industry sector 2/			Average Space per Job			
Employment Sector	Warehouse/ Distrib.	General Industrial	Tech/ Flex	Warehouse/ Distrib.	General Industrial	Tech/ Flex	Warehouse/ Distrib.	General Industrial	Tech/ Flex	Weighted Average
Construction	0%	75%	25%	0.31	0.30	0.26	0.00	0.23	0.07	**0.29**
Manufacturing	0%	75%	25%	0.31	0.30	0.26	0.00	0.23	0.07	**0.29**
Wholesale Trade	90%	0%	10%	0.31	0.30	0.26	0.28	0.00	0.03	**0.31**
Retail Trade	0%	0%	0%	0.31	0.30	0.26	0.00	0.00	0.00	**0.00**
Transportation, Warehousing & Util	100%	0%	0%	0.31	0.30	0.26	0.31	0.00	0.00	**0.31**
Information	0%	0%	100%	0.31	0.30	0.26	0.00	0.00	0.26	**0.26**
Financial Activities	0%	0%	0%	0.31	0.30	0.26	0.00	0.00	0.00	**0.00**
Professional & Business Services	0%	0%	100%	0.31	0.30	0.26	0.00	0.00	0.26	**0.26**
Education & Health Services	0%	0%	0%	0.31	0.30	0.26	0.00	0.00	0.00	**0.00**
Leisure & Hospitality	0%	0%	0%	0.31	0.30	0.26	0.00	0.00	0.00	**0.00**
Other Services	0%	75%	25%	0.31	0.30	0.26	0.00	0.23	0.07	**0.29**
Government	0%	0%	0%	0.31	0.30	0.26	0.00	0.00	0.00	**0.00**

1/ Regional Industrial Land Study Phase II (Otak, Inc. et al, 1999) converted to NAICS by Johnson Gardner, LLC.
2/ Regional Industrial Land Study Phase III (EcoNorthwest and Otak, Inc., 2001) converted to NAICS by Johnson Gardner, LLC.

EXHIBIT 6.09

DEMAND PROJECTIONS FOR INDUSTRIAL LAND BY INDUSTRY SECTOR
NEWBERG, OREGON
2004-2024

Medium Growth Scenario	Newberg Industrial Space Need 1/						*Floor to*	Predicted Land Need (acres) 3/					
Employment Sector	2004	2009	2014	2019	2024	'04-'24	*Area Ratio 2/*	2004	2009	2014	2019	2024	*'04-'24*
Construction	90,456	99,922	111,875	126,654	144,634	54,177	***0.29***	8.6	9.5	10.6	12.0	13.7	***5.1***
Manufacturing	1,180,283	1,194,056	1,209,546	1,226,968	1,246,562	66,279	***0.29***	112.1	113.4	114.9	116.6	118.4	***6.3***
Wholesale Trade	111,038	117,097	122,421	127,099	131,209	20,171	***0.31***	10.0	10.6	11.1	11.5	11.9	***1.8***
Transportation, Warehousing & Utilitie	177,656	194,397	213,538	235,422	260,443	82,788	***0.31***	15.8	17.3	19.0	20.9	23.1	***7.4***
Information	19,936	22,227	24,782	27,631	30,807	10,871	***0.26***	2.1	2.4	2.6	2.9	3.3	***1.2***
Professional & Business Services	38,501	42,927	47,861	53,363	59,497	20,996	***0.26***	4.1	4.5	5.1	5.7	6.3	***2.2***
Other Services	169,071	188,505	210,173	234,332	261,268	92,197	***0.29***	16.1	17.9	20.0	22.3	24.8	***8.8***
Total/Weighted Average	**1,786,941**	**1,859,131**	**1,940,197**	**2,031,469**	**2,134,421**	**347,479**	***0.29***	**168.8**	**175.6**	**183.2**	**191.8**	**201.5**	***32.8***

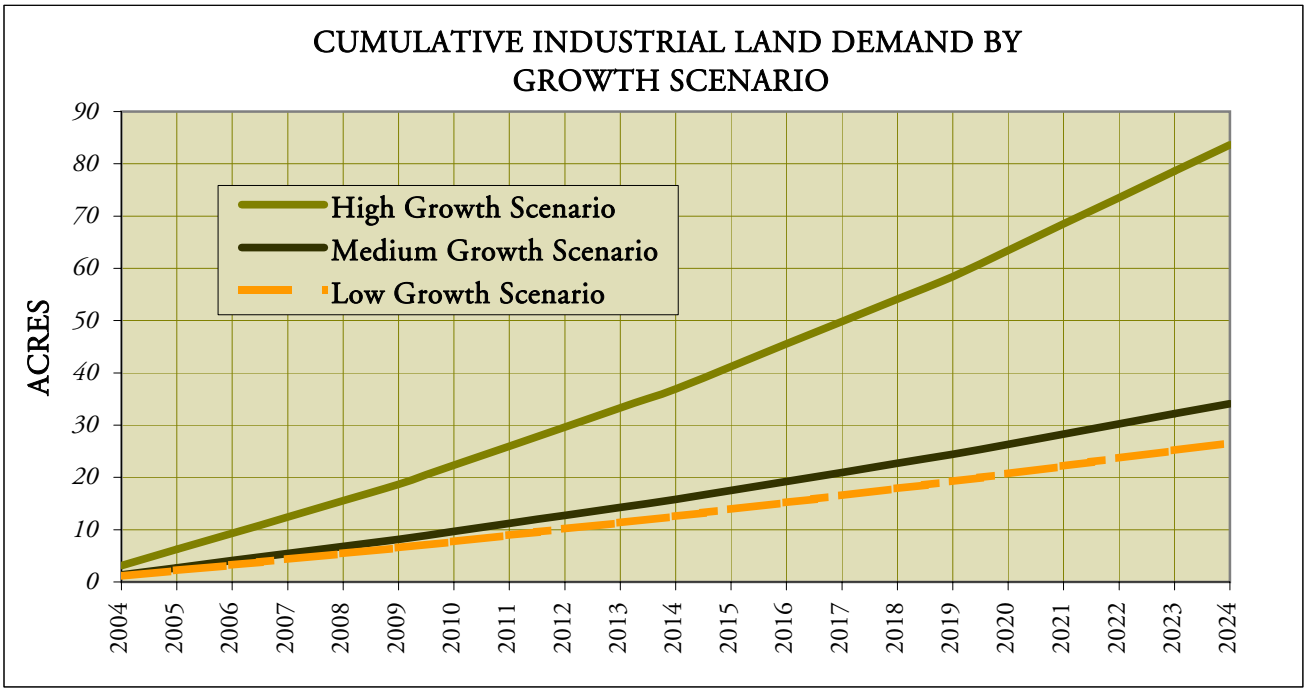
High Growth Scenario	Newberg Industrial Space Need 1/						*Floor to*	Predicted Land Need (acres) 3/					
Employment Sector	2004	2009	2014	2019	2024	'04-'24	*Area Ratio 2/*	2004	2009	2014	2019	2024	*'04-'24*
Construction	89,427	100,389	114,407	131,958	153,579	64,152	***0.29***	8.5	9.5	10.9	12.5	14.6	***6.1***
Manufacturing	1,180,283	1,281,936	1,403,516	1,548,928	1,722,843	542,560	***0.29***	112.1	121.8	133.3	147.1	163.7	***51.5***
Wholesale Trade	111,038	116,696	121,645	125,975	129,762	18,724	***0.31***	10.0	10.5	11.0	11.4	11.7	***1.7***
Transportation, Warehousing & Utilitie	177,656	194,208	213,116	234,714	259,385	81,729	***0.31***	15.8	17.3	18.9	20.9	23.1	***7.3***
Information	19,936	22,517	25,432	28,725	32,445	12,509	***0.26***	2.1	2.4	2.7	3.0	3.4	***1.3***
Professional & Business Services	38,501	43,487	49,117	55,477	62,660	24,158	***0.26***	4.1	4.6	5.2	5.9	6.6	***2.6***
Other Services	169,071	190,962	215,688	243,615	275,158	106,087	***0.29***	16.1	18.1	20.5	23.1	26.1	***10.1***
Total	**1,785,912**	**1,950,195**	**2,142,921**	**2,369,391**	**2,635,832**	**849,920**	***0.29***	**168.7**	**184.2**	**202.5**	**224.0**	**249.2**	***80.6***

Slow Growth Scenario	Newberg Industrial Space Need 1/						*Floor to*	Predicted Land Need (acres) 3/					
Employment Sector	2004	2009	2014	2019	2024	'04-'24	*Area Ratio 2/*	2004	2009	2014	2019	2024	*'04-'24*
Construction	90,991	98,560	107,973	119,435	133,169	42,178	***0.29***	8.6	9.4	10.3	11.3	12.7	***4.0***
Manufacturing	1,177,510	1,188,494	1,200,823	1,214,662	1,230,195	52,686	***0.29***	111.9	112.9	114.1	115.4	116.9	***5.0***
Wholesale Trade	111,572	116,415	120,613	124,250	127,403	15,831	***0.31***	10.1	10.5	10.9	11.2	11.5	***1.4***
Transportation, Warehousing & Utilitie	178,849	192,241	207,297	224,226	243,260	64,410	***0.31***	15.9	17.1	18.4	19.9	21.6	***5.7***
Information	20,129	21,963	23,965	26,150	28,534	8,405	***0.26***	2.1	2.3	2.5	2.8	3.0	***0.9***
Professional & Business Services	38,874	42,418	46,284	50,503	55,107	16,232	***0.26***	4.1	4.5	4.9	5.4	5.8	***1.7***
Other Services	170,708	186,269	203,248	221,774	241,990	71,281	***0.29***	16.2	17.7	19.3	21.1	23.0	***6.8***
Total	**1,788,633**	**1,846,359**	**1,910,204**	**1,981,001**	**2,059,657**	**271,024**	***0.29***	**168.9**	**174.4**	**180.4**	**187.1**	**194.5**	***25.5***

1/ From EXHIBIT Z.
2/ From EXHIBIT A.
3/ Assumes a non-traditional industrial land use factor of 10% from Regional Industrial Land Study Phase II (Otak, Inc., et al, 1999).

EXHIBIT 6.10

COMPARISON OF CUMULATIVE DEMAND FOR INDUSTRIAL LAND
MEDIUM, HIGH AND LOW EMPLOYMENT GROWTH SCENARIOS
2004-2024



SOURCE: Johnson Gardner, LLC

EXHIBIT 6.11

PROJECTED DISTRIBUTION OF DEMAND BY SIZE OF SPACE
NEWBERG, OREGON
2004-2024

Medium Growth	Net New Demand for Space (SF)	Distribution of Need by Firm Size/Space Required (SF) 3/							
		Under 800	800-1,800	1,800-3,800	3,800-9,800	9,800-19,800	19,800-49,800	49,800-100,000	Over 100,000
Office Demand 1/									
2004-2009	52,146	75	7	2	1	0	0	0	0
2009-2014	58,086	84	8	3	1	0	0	0	0
2014-2019	64,713	94	9	3	1	0	0	0	0
2019-2024	72,106	104	10	3	1	0	0	0	0
2004-2024	**247,051**	**357**	**35**	**11**	**3**	**1**	**0**	**0**	**0**
Share:		*87.7%*	*8.7%*	*2.6%*	*0.7%*	*0.4%*	*0.0%*	*0.0%*	*0.0%*
Industrial Demand 2/									
2004-2009	72,189	104	10	3	1	0	0	0	0
2009-2014	81,066	117	12	4	1	0	0	0	0
2014-2019	91,272	132	13	4	1	1	0	0	0
2019-2024	102,952	149	15	4	1	1	0	0	0
2004-2024	**347,479**	**502**	**50**	**15**	**4**	**2**	**0**	**0**	**0**
Share:		*87.6%*	*8.7%*	*2.6%*	*0.7%*	*0.4%*	*0.0%*	*0.0%*	*0.0%*

High Growth	Net New Demand for Space (SF)	Distribution of Need by Firm Size/Space Required (SF) 3/							
		Under 800	800-1,800	1,800-3,800	3,800-9,800	9,800-19,800	19,800-49,800	49,800-100,000	Over 100,000
Office Demand 1/									
2004-2009	59,070	85	8	3	1	0	0	0	0
2009-2014	66,794	97	10	3	1	0	0	0	0
2014-2019	75,565	109	11	3	1	0	0	0	0
2019-2024	85,530	124	12	4	1	1	0	0	0
2004-2024	**286,959**	**415**	**41**	**12**	**3**	**2**	**0**	**0**	**0**
Share:		*87.6%*	*8.7%*	*2.6%*	*0.7%*	*0.4%*	*0.0%*	*0.0%*	*0.0%*
Industrial Demand 2/									
2004-2009	164,283	237	24	7	2	1	0	0	0
2009-2014	192,726	279	28	8	2	1	0	0	0
2014-2019	226,470	327	32	10	2	1	0	0	0
2019-2024	266,441	385	38	12	3	2	0	0	0
2004-2024	**849,920**	**1,228**	**122**	**37**	**9**	**5**	**0**	**0**	**0**
Share:		*87.6%*	*8.7%*	*2.6%*	*0.7%*	*0.4%*	*0.0%*	*0.0%*	*0.0%*

Low Growth	Net New Demand for Space (SF)	Distribution of Need by Firm Size/Space Required (SF) 3/							
		Under 800	800-1800 SF	1,800-3,800	3,800-9,800	9,800-19,800	19,800-49,800	49,800-100,000	Over 100,000
Office Demand 1/									
2004-2009	41,745	60	6	2	0	0	0	0	0
2009-2014	45,547	66	7	2	1	0	0	0	0
2014-2019	49,704	72	7	2	1	0	0	0	0
2019-2024	54,249	78	8	2	1	0	0	0	0
2004-2024	**191,244**	**276**	**27**	**8**	**2**	**1**	**0**	**0**	**0**
Share:		*87.6%*	*8.7%*	*2.6%*	*0.7%*	*0.4%*	*0.0%*	*0.0%*	*0.0%*
Industrial Demand 2/									
2004-2009	57,727	104	10	3	1	0	0	0	0
2009-2014	63,844	117	12	4	1	0	0	0	0
2014-2019	70,798	132	13	4	1	0	0	0	0
2019-2024	78,656	149	15	4	1	0	0	0	0
2004-2024	**271,024**	**502**	**50**	**15**	**4**	**2**	**0**	**0**	**0**
Share:		*87.7%*	*8.7%*	*2.6%*	*0.7%*	*0.3%*	*0.0%*	*0.0%*	*0.0%*

1/ From EXHIBIT X.
2/ From EXHIBIT Y.
3/ Utilizes the distribution of businesses by size for Newberg, Oregon from 2001 (ZIP Code Business Patterns, U.S.Census Bureau).

EXHIBIT 6.12

PROJECTIONS OF HOUSEHOLD RETAIL SALES
NEWBERG, OREGON
2004-2024

Medium Growth Scenario 1/			Household Retail Spending in Millions (Households)					
NAICS	Category	Per Household Expenditures 2/	2004 *7,116*	2009 *8,154*	2014 *9,631*	2019 *11,393*	2024 *13,244*	'04-'24 *6,128*
4413	Automotive Parts, Accessories and Tire Stores	$5,501	$39.1	$44.9	$53.0	$62.7	$72.9	$33.7
442	Furniture and Home Furnishings Stores	$861	$6.1	$7.0	$8.3	$9.8	$11.4	$5.3
443	Electronics and Appliance Stores	$2,181	$15.5	$17.8	$21.0	$24.8	$28.9	$13.4
444	Building Materials and Garden Equipment	$875	$6.2	$7.1	$8.4	$10.0	$11.6	$5.4
445	Food and Beverage Stores	$6,910	$49.2	$56.3	$66.5	$78.7	$91.5	$42.3
446	Health and Personal Care Stores	$1,897	$13.5	$15.5	$18.3	$21.6	$25.1	$11.6
448	Clothing and Clothing Accessories Stores	$3,756	$26.7	$30.6	$36.2	$42.8	$49.7	$23.0
451	Sporting Goods, Hobby, Book and Music Stores	$1,904	$13.5	$15.5	$18.3	$21.7	$25.2	$11.7
452	General Merchandise Stores	$1,160	$8.3	$9.5	$11.2	$13.2	$15.4	$7.1
453	Miscellaneous Store Retailers	$715	$5.1	$5.8	$6.9	$8.1	$9.5	$4.4
722	Foodservices and Drinking Places	$3,458	$24.6	$28.2	$33.3	$39.4	$45.8	$21.2
	Totals/Weighted Averages	**$29,218**	**$207.9**	**$238.2**	**$281.4**	**$332.9**	**$387.0**	**$179.1**

High Growth Scenario 1/			Household Retail Spending in Millions (Households)					
NAICS	Category	Per Household Expenditures 2/	2004 *7,348*	2009 *9,547*	2014 *11,938*	2019 *14,783*	2024 *18,013*	'04-'24 *10,665*
4413	Automotive Parts, Accessories and Tire Stores	$5,501	$40.4	$52.5	$65.7	$81.3	$99.1	$58.7
442	Furniture and Home Furnishings Stores	$861	$6.3	$8.2	$10.3	$12.7	$15.5	$9.2
443	Electronics and Appliance Stores	$2,181	$16.0	$20.8	$26.0	$32.2	$39.3	$23.3
444	Building Materials and Garden Equipment	$875	$6.4	$8.4	$10.4	$12.9	$15.8	$9.3
445	Food and Beverage Stores	$6,910	$50.8	$66.0	$82.5	$102.1	$124.5	$73.7
446	Health and Personal Care Stores	$1,897	$13.9	$18.1	$22.6	$28.0	$34.2	$20.2
448	Clothing and Clothing Accessories Stores	$3,756	$27.6	$35.9	$44.8	$55.5	$67.7	$40.1
451	Sporting Goods, Hobby, Book and Music Stores	$1,904	$14.0	$18.2	$22.7	$28.1	$34.3	$20.3
452	General Merchandise Stores	$1,160	$8.5	$11.1	$13.8	$17.1	$20.9	$12.4
453	Miscellaneous Store Retailers	$715	$5.3	$6.8	$8.5	$10.6	$12.9	$7.6
722	Foodservices and Drinking Places	$3,458	$25.4	$33.0	$41.3	$51.1	$62.3	$36.9
	Totals/Weighted Averages	**$29,218**	**$214.7**	**$278.9**	**$348.8**	**$431.9**	**$526.3**	**$311.6**

Low Growth Scenario 1/			Household Retail Spending in Millions (Households)					
NAICS	Category	Per Household Expenditures 2/	2004 *7,135*	2009 *8,252*	2014 *9,436*	2019 *10,751*	2024 *12,065*	'04-'24 *4,930*
4413	Automotive Parts, Accessories and Tire Stores	$5,501	$39.3	$45.4	$51.9	$59.1	$66.4	$27.1
442	Furniture and Home Furnishings Stores	$861	$6.1	$7.1	$8.1	$9.3	$10.4	$4.2
443	Electronics and Appliance Stores	$2,181	$15.6	$18.0	$20.6	$23.4	$26.3	$10.8
444	Building Materials and Garden Equipment	$875	$6.2	$7.2	$8.3	$9.4	$10.6	$4.3
445	Food and Beverage Stores	$6,910	$49.3	$57.0	$65.2	$74.3	$83.4	$34.1
446	Health and Personal Care Stores	$1,897	$13.5	$15.7	$17.9	$20.4	$22.9	$9.4
448	Clothing and Clothing Accessories Stores	$3,756	$26.8	$31.0	$35.4	$40.4	$45.3	$18.5
451	Sporting Goods, Hobby, Book and Music Stores	$1,904	$13.6	$15.7	$18.0	$20.5	$23.0	$9.4
452	General Merchandise Stores	$1,160	$8.3	$9.6	$10.9	$12.5	$14.0	$5.7
453	Miscellaneous Store Retailers	$715	$5.1	$5.9	$6.7	$7.7	$8.6	$3.5
722	Foodservices and Drinking Places	$3,458	$24.7	$28.5	$32.6	$37.2	$41.7	$17.0
	Totals/Weighted Averages	**$29,218**	**$208.5**	**$241.1**	**$275.7**	**$314.1**	**$352.5**	**$144.0**

1/ Medium, High and Low Growth Scenarios reflect Newberg household growth forecasts for analogous scenarios in the residential analysis (EXHIBITS X-Y).
2/ Claritas, Inc. average retail sales figures for the City of Newberg in 2003 dollars.

EXHIBIT 6.13

PROJECTIONS OF COMMERCIAL RETAIL SPACE NEED
NEWBERG, OREGON
2004-2024

Medium Growth Scenario 1/		Household Retail Spending (millions)						Sales Support	Retail Space Need (SF) 3/					
NAICS	Category	2004	2009	2014	2019	2024	'04-'24	Factor 2/	2004	2009	2014	2019	2024	'04-'24
4413	Automotive Parts, Accessories and Tire Stores	$39.1	$44.9	$53.0	$62.7	$72.9	$33.7	$139	309,772	354,948	419,256	495,952	576,551	266,779
442	Furniture and Home Furnishings Stores	$6.1	$7.0	$8.3	$9.8	$11.4	$5.3	$173	38,956	44,637	52,724	62,369	72,505	33,549
443	Electronics and Appliance Stores	$15.5	$17.8	$21.0	$24.8	$28.9	$13.4	$200	85,357	97,806	115,526	136,659	158,868	73,511
444	Building Materials and Garden Equipment	$6.2	$7.1	$8.4	$10.0	$11.6	$5.4	$128	53,507	61,311	72,419	85,667	99,588	46,081
445	Food and Beverage Stores	$49.2	$56.3	$66.5	$78.7	$91.5	$42.3	$312	173,356	198,638	234,626	277,547	322,652	149,296
446	Health and Personal Care Stores	$13.5	$15.5	$18.3	$21.6	$25.1	$11.6	$230	64,559	73,974	87,376	103,360	120,157	55,599
448	Clothing and Clothing Accessories Stores	$26.7	$30.6	$36.2	$42.8	$49.7	$23.0	$217	135,482	155,240	183,366	216,910	252,160	116,678
451	Sporting Goods, Hobby, Book and Music Stores	$13.5	$15.5	$18.3	$21.7	$25.2	$11.7	$195	76,427	87,573	103,439	122,362	142,247	65,820
452	General Merchandise Stores	$8.3	$9.5	$11.2	$13.2	$15.4	$7.1	$139	65,322	74,848	88,409	104,582	121,578	56,256
453	Miscellaneous Store Retailers	$5.1	$5.8	$6.9	$8.1	$9.5	$4.4	$192	29,149	33,400	39,451	46,668	54,252	25,103
722	Foodservices and Drinking Places	$24.6	$28.2	$33.3	$39.4	$45.8	$21.2	$236	114,691	131,417	155,226	183,623	213,463	98,773
	Totals/Weighted Averages	**$207.9**	**$238.2**	**$281.4**	**$332.9**	**$387.0**	**$179.1**		**1,146,576**	**1,313,792**	**1,551,819**	**1,835,698**	**2,134,021**	**987,445**

High Growth Scenario 1/		Household Retail Spending (millions)						Sales Support	Retail Space Need (SF) 3/					
NAICS	Category	2004	2009	2014	2019	2024	'04-'24	Factor 2/	2004	2009	2014	2019	2024	'04-'24
4413	Automotive Parts, Accessories and Tire Stores	$40.4	$52.5	$65.7	$81.3	$99.1	$58.7	$139	319,894	415,603	519,702	643,542	784,167	464,273
442	Furniture and Home Furnishings Stores	$6.3	$8.2	$10.3	$12.7	$15.5	$9.2	$173	40,229	52,265	65,356	80,929	98,614	58,385
443	Electronics and Appliance Stores	$16.0	$20.8	$26.0	$32.2	$39.3	$23.3	$200	88,146	114,519	143,203	177,327	216,076	127,930
444	Building Materials and Garden Equipment	$6.4	$8.4	$10.4	$12.9	$15.8	$9.3	$128	55,256	71,788	89,769	111,160	135,450	80,195
445	Food and Beverage Stores	$50.8	$66.0	$82.5	$102.1	$124.5	$73.7	$312	179,020	232,581	290,838	360,142	438,839	259,819
446	Health and Personal Care Stores	$13.9	$18.1	$22.6	$28.0	$34.2	$20.2	$230	66,668	86,615	108,310	134,119	163,426	96,758
448	Clothing and Clothing Accessories Stores	$27.6	$35.9	$44.8	$55.5	$67.7	$40.1	$217	139,909	181,768	227,297	281,459	342,963	203,055
451	Sporting Goods, Hobby, Book and Music Stores	$14.0	$18.2	$22.7	$28.1	$34.3	$20.3	$195	78,924	102,538	128,221	158,775	193,470	114,546
452	General Merchandise Stores	$8.5	$11.1	$13.8	$17.1	$20.9	$12.4	$139	67,456	87,638	109,590	135,704	165,358	97,902
453	Miscellaneous Store Retailers	$5.3	$6.8	$8.5	$10.6	$12.9	$7.6	$192	30,101	39,107	48,903	60,556	73,788	43,687
722	Foodservices and Drinking Places	$25.4	$33.0	$41.3	$51.1	$62.3	$36.9	$236	118,438	153,874	192,416	238,266	290,332	171,894
	Totals/Weighted Averages	**$214.7**	**$278.9**	**$348.8**	**$431.9**	**$526.3**	**$311.6**		**1,184,041**	**1,538,296**	**1,923,603**	**2,381,979**	**2,902,483**	**1,718,442**

Low Growth Scenario 1/		Household Retail Spending (millions)						Sales Support	Retail Space Need (SF) 3/					
NAICS	Category	2004	2009	2014	2019	2024	'04-'24	Factor 2/	2004	2009	2014	2019	2024	'04-'24
4413	Automotive Parts, Accessories and Tire Stores	$39.3	$45.4	$51.9	$59.1	$66.4	$27.1	$139	310,623	359,234	410,770	468,026	525,247	214,624
442	Furniture and Home Furnishings Stores	$6.1	$7.1	$8.1	$9.3	$10.4	$4.2	$173	39,063	45,176	51,657	58,857	66,053	26,990
443	Electronics and Appliance Stores	$15.6	$18.0	$20.6	$23.4	$26.3	$10.8	$200	85,592	98,987	113,187	128,964	144,731	59,140
444	Building Materials and Garden Equipment	$6.2	$7.2	$8.3	$9.4	$10.6	$4.3	$128	53,654	62,051	70,953	80,843	90,727	37,072
445	Food and Beverage Stores	$49.3	$57.0	$65.2	$74.3	$83.4	$34.1	$312	173,832	201,036	229,877	261,919	293,941	120,109
446	Health and Personal Care Stores	$13.5	$15.7	$17.9	$20.4	$22.9	$9.4	$230	64,736	74,867	85,608	97,540	109,465	44,729
448	Clothing and Clothing Accessories Stores	$26.8	$31.0	$35.4	$40.4	$45.3	$18.5	$217	135,854	157,115	179,655	204,696	229,722	93,868
451	Sporting Goods, Hobby, Book and Music Stores	$13.6	$15.7	$18.0	$20.5	$23.0	$9.4	$195	76,637	88,630	101,346	115,472	129,589	52,952
452	General Merchandise Stores	$8.3	$9.6	$10.9	$12.5	$14.0	$5.7	$139	65,501	75,752	86,619	98,693	110,759	45,258
453	Miscellaneous Store Retailers	$5.1	$5.9	$6.7	$7.7	$8.6	$3.5	$192	29,229	33,803	38,652	44,040	49,424	20,196
722	Foodservices and Drinking Places	$24.7	$28.5	$32.6	$37.2	$41.7	$17.0	$236	115,006	133,004	152,085	173,283	194,469	79,463
	Totals/Weighted Averages	**$208.5**	**$241.1**	**$275.7**	**$314.1**	**$352.5**	**$144.0**		**1,149,727**	**1,329,654**	**1,520,409**	**1,732,334**	**1,944,128**	**794,402**

1/ Medium, High and Low Growth Scenarios reflect Newberg household growth forecasts for analogous scenarios in the residential analysis (EXHIBITS X-Y).
2/ Based on national averages derived from "Dollars & Cents of Shopping Centers," Urban Land Institute, 2000.
3/ Assumes a market-clearing retail space vacancy rate of 10%.

EXHIBIT 6.14

PROJECTIONS OF COMMERCIAL RETAIL LAND NEED
NEWBERG, OREGON
2004-2024

Medium Growth Scenario 1/		Retail Space Need (SF) 2/						Retail	Commercial Retail Land Need (acres)					
NAICS	Category	2004	2009	2014	2019	2024	'04-'24	FAR 3/	2004	2009	2014	2019	2024	'04-'24
4413	Automotive Parts, Accessories and Tire Stores	309,772	354,948	419,256	495,952	576,551	266,779	0.25	28.4	32.6	38.5	45.5	52.9	24.5
442	Furniture and Home Furnishings Stores	38,956	44,637	52,724	62,369	72,505	33,549	0.25	3.6	4.1	4.8	5.7	6.7	3.1
443	Electronics and Appliance Stores	85,357	97,806	115,526	136,659	158,868	73,511	0.25	7.8	9.0	10.6	12.5	14.6	6.8
444	Building Materials and Garden Equipment	53,507	61,311	72,419	85,667	99,588	46,081	0.25	4.9	5.6	6.7	7.9	9.1	4.2
445	Food and Beverage Stores	173,356	198,638	234,626	277,547	322,652	149,296	0.25	15.9	18.2	21.5	25.5	29.6	13.7
446	Health and Personal Care Stores	64,559	73,974	87,376	103,360	120,157	55,599	0.25	5.9	6.8	8.0	9.5	11.0	5.1
448	Clothing and Clothing Accessories Stores	135,482	155,240	183,366	216,910	252,160	116,678	0.25	12.4	14.3	16.8	19.9	23.2	10.7
451	Sporting Goods, Hobby, Book and Music Stores	76,427	87,573	103,439	122,362	142,247	65,820	0.25	7.0	8.0	9.5	11.2	13.1	6.0
452	General Merchandise Stores	65,322	74,848	88,409	104,582	121,578	56,256	0.25	6.0	6.9	8.1	9.6	11.2	5.2
453	Miscellaneous Store Retailers	29,149	33,400	39,451	46,668	54,252	25,103	0.25	2.7	3.1	3.6	4.3	5.0	2.3
722	Foodservices and Drinking Places	114,691	131,417	155,226	183,623	213,463	98,773	0.25	10.5	12.1	14.3	16.9	19.6	9.1
	Totals/Weighted Averages	**1,146,576**	**1,313,792**	**1,551,819**	**1,835,698**	**2,134,021**	**987,445**		**105.3**	**120.6**	**142.5**	**168.6**	**196.0**	**90.7**

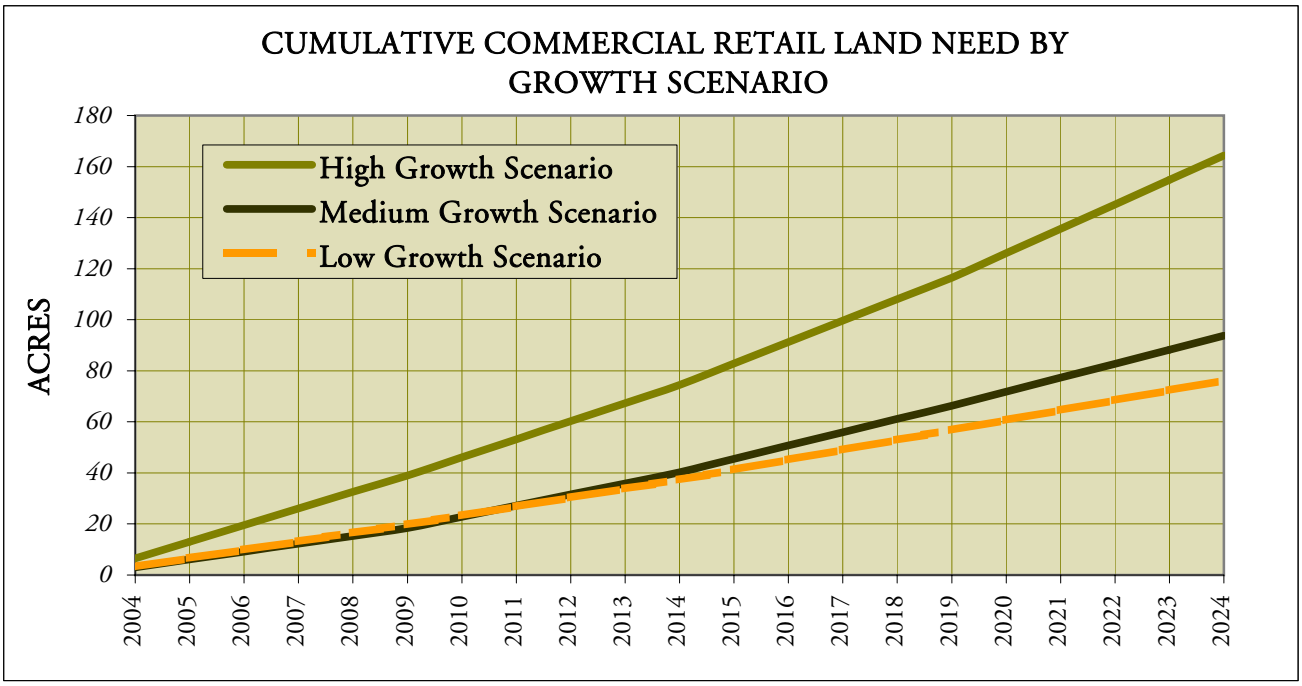
High Growth Scenario 1/		Retail Space Need (SF) 2/						Retail	Commercial Retail Land Need (acres)					
NAICS	Category	2004	2009	2014	2019	2024	'04-'24	FAR 3/	2004	2009	2014	2019	2024	'04-'24
4413	Automotive Parts, Accessories and Tire Stores	319,894	415,603	519,702	643,542	784,167	464,273	0.25	29.4	38.2	47.7	59.1	72.0	42.6
442	Furniture and Home Furnishings Stores	40,229	52,265	65,356	80,929	98,614	58,385	0.25	3.7	4.8	6.0	7.4	9.1	5.4
443	Electronics and Appliance Stores	88,146	114,519	143,203	177,327	216,076	127,930	0.25	8.1	10.5	13.1	16.3	19.8	11.7
444	Building Materials and Garden Equipment	55,256	71,788	89,769	111,160	135,450	80,195	0.25	5.1	6.6	8.2	10.2	12.4	7.4
445	Food and Beverage Stores	179,020	232,581	290,838	360,142	438,839	259,819	0.25	16.4	21.4	26.7	33.1	40.3	23.9
446	Health and Personal Care Stores	66,668	86,615	108,310	134,119	163,426	96,758	0.25	6.1	8.0	9.9	12.3	15.0	8.9
448	Clothing and Clothing Accessories Stores	139,909	181,768	227,297	281,459	342,963	203,055	0.25	12.8	16.7	20.9	25.8	31.5	18.6
451	Sporting Goods, Hobby, Book and Music Stores	78,924	102,538	128,221	158,775	193,470	114,546	0.25	7.2	9.4	11.8	14.6	17.8	10.5
452	General Merchandise Stores	67,456	87,638	109,590	135,704	165,358	97,902	0.25	6.2	8.0	10.1	12.5	15.2	9.0
453	Miscellaneous Store Retailers	30,101	39,107	48,903	60,556	73,788	43,687	0.25	2.8	3.6	4.5	5.6	6.8	4.0
722	Foodservices and Drinking Places	118,438	153,874	192,416	238,266	290,332	171,894	0.25	10.9	14.1	17.7	21.9	26.7	15.8
	Totals/Weighted Averages	**1,184,041**	**1,538,296**	**1,923,603**	**2,381,979**	**2,902,483**	**1,718,442**		**108.7**	**141.3**	**176.6**	**218.7**	**266.5**	**157.8**

Low Growth Scenario 1/		Retail Space Need (SF) 2/						Retail	Commercial Retail Land Need (acres)					
NAICS	Category	2004	2009	2014	2019	2024	'04-'24	FAR 3/	2004	2009	2014	2019	2024	'04-'24
4413	Automotive Parts, Accessories and Tire Stores	310,623	359,234	410,770	468,026	525,247	214,624	0.25	28.5	33.0	37.7	43.0	48.2	19.7
442	Furniture and Home Furnishings Stores	39,063	45,176	51,657	58,857	66,053	26,990	0.25	3.6	4.1	4.7	5.4	6.1	2.5
443	Electronics and Appliance Stores	85,592	98,987	113,187	128,964	144,731	59,140	0.25	7.9	9.1	10.4	11.8	13.3	5.4
444	Building Materials and Garden Equipment	53,654	62,051	70,953	80,843	90,727	37,072	0.25	4.9	5.7	6.5	7.4	8.3	3.4
445	Food and Beverage Stores	173,832	201,036	229,877	261,919	293,941	120,109	0.25	16.0	18.5	21.1	24.1	27.0	11.0
446	Health and Personal Care Stores	64,736	74,867	85,608	97,540	109,465	44,729	0.25	5.9	6.9	7.9	9.0	10.1	4.1
448	Clothing and Clothing Accessories Stores	135,854	157,115	179,655	204,696	229,722	93,868	0.25	12.5	14.4	16.5	18.8	21.1	8.6
451	Sporting Goods, Hobby, Book and Music Stores	76,637	88,630	101,346	115,472	129,589	52,952	0.25	7.0	8.1	9.3	10.6	11.9	4.9
452	General Merchandise Stores	65,501	75,752	86,619	98,693	110,759	45,258	0.25	6.0	7.0	8.0	9.1	10.2	4.2
453	Miscellaneous Store Retailers	29,229	33,803	38,652	44,040	49,424	20,196	0.25	2.7	3.1	3.5	4.0	4.5	1.9
722	Foodservices and Drinking Places	115,006	133,004	152,085	173,283	194,469	79,463	0.25	10.6	12.2	14.0	15.9	17.9	7.3
	Totals/Weighted Averages	**1,149,727**	**1,329,654**	**1,520,409**	**1,732,334**	**1,944,128**	**794,402**		**105.6**	**122.1**	**139.6**	**159.1**	**178.5**	**72.9**

1/ Medium, High and Low Growth Scenarios reflect Newberg household growth forecasts for analogous scenarios in the residential analysis (EXHIBITS X-Y).
2/ Based on national averages derived from "Dollars & Cents of Shopping Centers," Urban Land Institute, 2000.
3/ Assumes typical suburban retail profile: single-story with four parking spaces per 1,000 square feet of developed space.

EXHIBIT 6.15

COMPARISON OF CUMULATIVE DEMAND FOR COMMERCIAL RETAIL LAND
MEDIUM, HIGH AND LOW EMPLOYMENT GROWTH SCENARIOS
2004-2024



SOURCE: Johnson Gardner, LLC

EXHIBIT 6.16

PROJECTIONS OF OFFICE SPACE-UTILIZING EMPLOYMENT BY INDUSTRY SECTOR
NEWBERG, OREGON
2004-2024

Medium Growth Scenario	Annual Salary 1/		Jobs by Household 3/	
Employment Sector	Full Time	Part Time 2/	Participation	Share
Construction	$34,120	$17,060	Male	
Manufacturing	$37,948	$18,974	Single Income	33.0%
Wholesale Trade	$36,285	$18,143	Dual Income	67.0%
Retail Trade	$22,059	$11,030		
Transportation, Warehousing & Utilities	$31,585	$15,793	Female	
Information	$29,307	$14,654	Single Income	20.1%
Financial Activities	$33,076	$16,538	Dual Income	79.9%
Professional & Business Services	$28,979	$14,490		
Education & Health Services	$27,903	$13,952		
Leisure & Hospitality	$10,878	$5,439		
Other Services	$18,527	$9,264		
Government	$37,054	$18,527		
Total				

1/ Newberg payroll employment growth for each sector is based on projected Yamhill County growth assuming a City capture rate for each industry. Capture rates adjust annually based on changes in local payroll employment capture recorded from 1994 to 2002.
2/ Share of industry employment that utilizes office space. From the Urban Land Institute converted to NAICS by Johnson Gardner, LLC.
3/ U.S. Census Bureau, 2000 for the City of Newberg

EXHIBIT 6.17

SUMMARY OF RESIDENTIAL DEMAND
BY TENURE AND HOUSEHOLD INCOME RANGE

Medium Growth Scenario	All Employed Households						Percent of
Household Income	2004	2009	2014	2019	2024	'04-'24	Total
Under $10,000	106	119	132	148	165	58	*2%*
$10,000-$14,999	367	407	451	500	554	187	*6%*
$15,000-$24,999	803	864	933	1,010	1,096	293	*9%*
$25,000-$34,999	1,934	2,108	2,305	2,528	2,780	846	*27%*
$35,000-$49,999	2,476	2,644	2,833	3,045	3,284	807	*26%*
$50,000-$74,999	2,487	2,688	2,915	3,170	3,456	969	*31%*
$75,000-$99,999	7	8	9	9	10	3	*0%*
$100,000-$149,999	0	0	0	0	0	0	*0%*
$150,000-$249,999	0	0	0	0	0	0	*0%*
$250,000-$499,999	0	0	0	0	0	0	*0%*
$500,000 or More	0	0	0	0	0	0	*0%*
Overall	**8,181**	**8,839**	**9,578**	**10,410**	**11,345**	**3,164**	

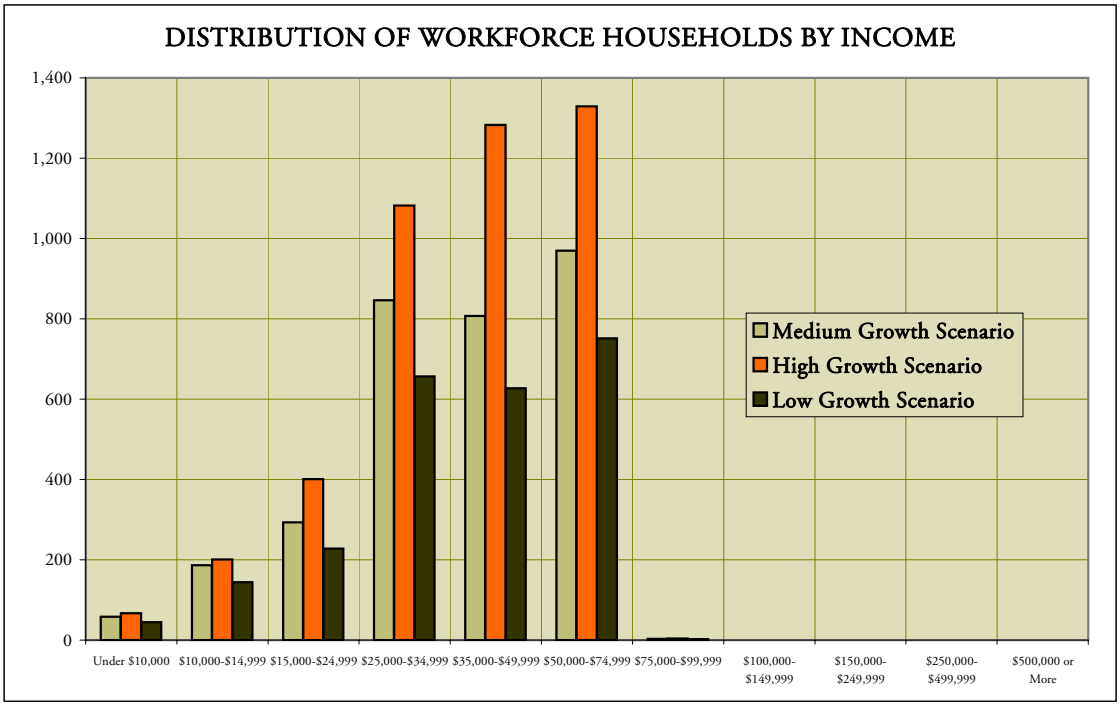
High Growth Scenario	All Employed Households						
Household Income	2004	2009	2014	2019	2024	'04-'24	
Under $10,000	106	120	136	153	173	67	*2%*
$10,000-$14,999	367	409	456	509	568	201	*5%*
$15,000-$24,999	803	883	975	1,081	1,203	401	*9%*
$25,000-$34,999	1,931	2,147	2,396	2,683	3,014	1,082	*25%*
$35,000-$49,999	2,475	2,729	3,023	3,363	3,757	1,283	*29%*
$50,000-$74,999	2,485	2,751	3,057	3,409	3,814	1,329	*30%*
$75,000-$99,999	7	8	9	10	11	4	*0%*
$100,000-$149,999	0	0	0	0	0	0	*0%*
$150,000-$249,999	0	0	0	0	0	0	*0%*
$250,000-$499,999	0	0	0	0	0	0	*0%*
$500,000 or More	0	0	0	0	0	0	*0%*
Overall	**8,175**	**9,047**	**10,052**	**11,209**	**12,541**	**4,367**	

Low Growth Scenario	All Employed Households						
Household Income	2004	2009	2014	2019	2024	'04-'24	
Under $10,000	108	117	128	140	152	45	*2%*
$10,000-$14,999	371	402	437	474	515	145	*6%*
$15,000-$24,999	807	856	910	969	1,035	227	*9%*
$25,000-$34,999	1,946	2,086	2,241	2,412	2,602	656	*27%*
$35,000-$49,999	2,486	2,621	2,769	2,933	3,113	627	*26%*
$50,000-$74,999	2,500	2,662	2,840	3,036	3,252	752	*31%*
$75,000-$99,999	7	8	8	9	10	2	*0%*
$100,000-$149,999	0	0	0	0	0	0	*0%*
$150,000-$249,999	0	0	0	0	0	0	*0%*
$250,000-$499,999	0	0	0	0	0	0	*0%*
$500,000 or More	0	0	0	0	0	0	*0%*
Overall	**8,226**	**8,752**	**9,333**	**9,974**	**10,680**	**2,454**	

1/ Income stated in 2003 Dollars.

SOURCE: Johnson Gardner

EXHIBIT 6.18



SOURCE: Johnson Gardner, LLC

WORKSOURCE OREGON
EMPLOYMENT DEPARTMENT

EMPLOYMENT PROJECTIONS BY INDUSTRY AND OCCUPATION 2008-2018 Region 3 (Marion, Polk, and Yamhill Counties)

For questions regarding industry projections, contact Nick Beleiciks at Nick.J.Beleiciks@state.or.us, (503) 947-1267

For questions regarding occupational projections, contact Brenda Turner at Brenda.P.Turner@state.or.us, (503) 947-1233

Oregon Employment Department
Workforce and Economic Research
875 Union St. NE
Salem, OR 97311
www.WorkingInOregon.org
www.QualityInfo.org

November 2009

Region 3: Industry Employment Forecast, 2008-2018
Marion, Polk, and Yamhill Counties

	2008	2018	Change	% Change
Total payroll employment	197,300	216,400	19,100	10%
Total private	150,700	166,800	16,100	11%
Natural resources and mining	16,300	17,000	700	4%
Mining and logging	1,500	1,300	-200	-13%
Construction	10,800	10,900	100	1%
Manufacturing	20,500	20,700	200	1%
Durable goods	10,900	10,900	0	0%
Wood product manufacturing	3,000	2,700	-300	-10%
Nondurable goods	9,600	9,800	200	2%
Food manufacturing	5,600	5,900	300	5%
Trade, transportation, and utilities	30,100	33,100	3,000	10%
Wholesale trade	4,600	4,900	300	7%
Retail trade	21,000	23,400	2,400	11%
Transportation, warehousing, and utilities	4,500	4,800	300	7%
Information	1,700	1,600	-100	-6%
Financial activities	8,900	9,500	600	7%
Professional and business services	14,300	16,400	2,100	15%
Administrative and support services	7,300	8,200	900	12%
Educational and health services	26,400	33,200	6,800	26%
Health care and social assistance	21,300	27,600	6,300	30%
Health care	17,900	23,400	5,500	31%
Leisure and hospitality	15,300	17,500	2,200	14%
Accommodation and food services	13,700	15,500	1,800	13%
Accommodation	900	1,200	300	33%
Food services and drinking places	12,700	14,300	1,600	13%
Other services	6,400	6,900	500	8%
Government	46,600	49,600	3,000	6%
Federal government	2,100	2,000	-100	-5%
State government	21,400	22,900	1,500	7%
State education	1,600	1,600	0	0%
Local government	23,100	24,700	1,600	7%
Indian tribal	2,000	2,100	100	5%
Local education	13,200	13,700	500	4%

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	Employment 2018	Employment Change	Employment Percent Change	2008-2018 Openings Due to Growth	2008-2018 Openings Due to Replacement	2008-2018 Openings Total	Minimum Education	Competitive Education
	Total All Occupations	197,151	216,329	19,178	9.7%	19,480	47,898	67,378		
	Management, Business, and Financial	18,900	20,404	1,504	8.0%	1,506	4,434	5,940		
11-0000	Management Occupations	8,853	9,629	776	8.8%	778	2,273	3,051		
11-1000	Top Executives	2,664	2,880	216	8.1%	216	801	1,017		
11-1011	Chief Executives	252	273	21	8.3%	21	74	95	Bachelor's	Bachelor's + Work Exp.
11-1021	General and Operations Managers	2,322	2,516	194	8.4%	194	701	895	Bachelor's	Bachelor's + Work Exp.
11-1031	Legislators	90	91	1	1.1%	1	26	27	Bachelor's	Bachelor's + Work Exp.
11-2000	Advertising, Marketing, Promotions, Public Relations, and Sales Managers	507	551	44	8.7%	44	116	160		
11-2011	Advertising and Promotions Managers	32	35	3	9.4%	3	8	11	Bachelor's	Bachelor's + Work Exp.
11-2021	Marketing Managers	159	176	17	10.7%	17	36	53	Bachelor's	Bachelor's + Work Exp.
11-2022	Sales Managers	231	244	13	5.6%	13	51	64	Bachelor's	Bachelor's + Work Exp.
11-2031	Public Relations Managers	85	96	11	12.9%	11	21	32	Bachelor's	Bachelor's + Work Exp.
11-3000	Operations Specialties Managers	1,368	1,469	101	7.4%	101	335	436		
11-3011	Administrative Services Managers	162	178	16	9.9%	16	36	52	Bachelor's	Bachelor's + Work Exp.
11-3021	Computer and Information Systems Managers	180	200	20	11.1%	20	31	51	Bachelor's	Bachelor's + Work Exp.
11-3031	Financial Managers	351	387	36	10.3%	36	66	102	Bachelor's	Bachelor's + Work Exp.
11-3041	Compensation and Benefits Managers	20	21	1	5.0%	1	4	5	Bachelor's	Bachelor's + Work Exp.
11-3042	Training and Development Managers	16	18	2	12.5%	2	4	6	Bachelor's	Bachelor's + Work Exp.
11-3049	Human Resources Managers, All Other	102	107	5	4.9%	5	22	27	Bachelor's	Bachelor's + Work Exp.
11-3051	Industrial Production Managers	264	265	1	0.4%	1	93	94	Bachelor's	Bachelor's + Work Exp.
11-3061	Purchasing Managers	127	135	8	6.3%	8	37	45	Bachelor's	Bachelor's + Work Exp.
11-3071	Transportation, Storage, and Distribution Managers	146	158	12	8.2%	12	42	54	Bachelor's	Bachelor's + Work Exp.
11-9000	Other Management Occupations	4,314	4,729	415	9.6%	417	1,021	1,438		
11-9011	Farm, Ranch, and Other Agricultural Managers	412	433	21	5.1%	21	86	107	Work Exp.	Bachelor's + Work Exp.
11-9021	Construction Managers	364	373	9	2.5%	9	29	38	Work Exp.	Bachelor's + Work Exp.
11-9031	Preschool and Child Care Administrators	63	75	12	19.0%	12	21	33	Assoc.	Bachelor's
11-9032	Elementary and Secondary School Administrators	290	303	13	4.5%	13	89	102	Bachelor's	Master's
11-9033	Postsecondary School Administrators	194	209	15	7.7%	15	60	75	Master's	PhD
11-9039	Education Administrators, All Other	49	52	3	6.1%	3	15	18	Master's	PhD
11-9041	Engineering Managers	80	85	5	6.3%	5	17	22	Bachelor's	Bachelor's + Work Exp.
11-9051	Food Service Managers	264	301	37	14.0%	37	55	92	Work Exp.	Assoc.
11-9061	Funeral Directors	34	36	2	5.9%	2	7	9	Assoc.	Assoc. + Work Exp.
11-9071	Gaming Managers	11	12	1	9.1%	1	2	3	Assoc.	Assoc. + Work Exp.
11-9081	Lodging Managers	35	49	14	40.0%	14	9	23	Work Exp.	Assoc.
11-9111	Medical and Health Services Managers	285	361	76	26.7%	76	62	138	Bachelor's	Master's
11-9121	Natural Sciences Managers	25	28	3	12.0%	3	8	11	Bachelor's	Master's
11-9131	Postmasters and Mail Superintendents	34	32	-2	-5.9%	0	7	7	Work Exp.	Bachelor's
11-9141	Property, Real Estate, and Community Association Managers	303	337	34	11.2%	34	55	89	Work Exp.	Post-sec.
11-9151	Social and Community Service Managers	196	243	47	24.0%	47	51	98	Bachelor's	Bachelor's + Work Exp.
11-9199	Managers, All Other	1,675	1,800	125	7.5%	125	448	573	Bachelor's	Bachelor's + Work Exp.
13-0000	Business and Financial Operations Occupations	10,047	10,775	728	7.2%	728	2,161	2,889		
13-1000	Business Operations Specialists	6,767	7,217	450	6.6%	450	1,508	1,958		
13-1011	Agents and Business Managers of Artists, Performers, and Athletes	2	3	1	50.0%	1	1	2	Bachelor's	Bachelor's + Work Exp.

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	Employment 2018	Employment Change	Employment Percent Change	2008-2018 Openings Due to Growth	2008-2018 Openings Due to Replacement	2008-2018 Openings Total	Minimum Education	Competitive Education
13-1021	Purchasing Agents and Buyers, Farm Products	140	145	5	3.6%	5	32	37	Bachelor's	Bachelor's + Work Exp.
13-1022	Wholesale and Retail Buyers, Except Farm Products	173	185	12	6.9%	12	45	57	Bachelor's	Bachelor's + Work Exp.
13-1023	Purchasing Agents, Except Wholesale, Retail, and Farm Products	536	557	21	3.9%	21	144	165	Bachelor's	Bachelor's + Work Exp.
13-1031	Claims Investigators, Examiners, and Adjusters	432	470	38	8.8%	38	114	152	Long OJT	Bachelor's
13-1032	Insurance Appraisers, Vehicle Damage	3	3	0	0.0%	0	1	1	Long OJT	Bachelor's
13-1041	Compliance Officers, Except Agriculture, Construction, Health and Safety, and Transportation	639	677	38	5.9%	38	70	108	Long OJT	Work Exp.
13-1051	Cost Estimators	402	404	2	0.5%	2	90	92	Moderate OJT	Bachelor's
13-1061	Emergency Management Specialists	10	11	1	10.0%	1	2	3	Work Exp.	Bachelor's
13-1071	Employment, Recruitment, and Placement Specialists	230	257	27	11.7%	27	64	91	Bachelor's	Bachelor's + Work Exp.
13-1072	Compensation, Benefits, and Job Analysis Specialists	92	102	10	10.9%	10	25	35	Bachelor's	Bachelor's + Work Exp.
13-1073	Training and Development Specialists	655	707	52	7.9%	52	178	230	Bachelor's	Bachelor's + Work Exp.
13-1079	Human Resources, Training, and Labor Relations Specialists, All Other	585	634	49	8.4%	49	159	208	Bachelor's	Bachelor's + Work Exp.
13-1081	Logisticians	34	36	2	5.9%	2	8	10	Bachelor's	Bachelor's + Work Exp.
13-1111	Management Analysts	1,455	1,538	83	5.7%	83	257	340	Bachelor's	Master's
13-1121	Meeting and Convention Planners	52	60	8	15.4%	8	12	20	Work Exp.	Bachelor's
13-1199	Business Operations Specialists, All Other	1,327	1,428	101	7.6%	101	306	407	Bachelor's	Bachelor's + Work Exp.
13-2000	Financial Specialists	3,280	3,558	278	8.5%	278	653	931		
13-2011	Accountants and Auditors	1,322	1,465	143	10.8%	143	236	379	Bachelor's	Bachelor's + Work Exp.
13-2021	Appraisers and Assessors of Real Estate	228	246	18	7.9%	18	43	61	Post-sec.	Bachelor's
13-2031	Budget Analysts	217	232	15	6.9%	15	41	56	Bachelor's	Bachelor's + Work Exp.
13-2041	Credit Analysts	39	39	0	0.0%	0	7	7	Bachelor's	Bachelor's + Work Exp.
13-2051	Financial Analysts	45	49	4	8.9%	4	9	13	Bachelor's	Master's
13-2052	Personal Financial Advisors	55	57	2	3.6%	2	6	8	Bachelor's	Bachelor's + Work Exp.
13-2053	Insurance Underwriters	246	261	15	6.1%	15	74	89	Bachelor's	Bachelor's + Work Exp.
13-2061	Financial Examiners	59	61	2	3.4%	2	11	13	Bachelor's	Bachelor's + Work Exp.
13-2071	Loan Counselors	57	64	7	12.3%	7	7	14	Bachelor's	Bachelor's + Work Exp.
13-2072	Loan Officers	375	396	21	5.6%	21	42	63	Bachelor's	Bachelor's + Work Exp.
13-2081	Tax Examiners, Collectors, and Revenue Agents	336	346	10	3.0%	10	121	131	Bachelor's	Bachelor's + Work Exp.
13-2082	Tax Preparers	134	160	26	19.4%	26	24	50	Post-sec.	Post-sec. + Work Exp.
13-2099	Financial Specialists, All Other	167	182	15	9.0%	15	32	47	Bachelor's	Bachelor's + Work Exp.
	Professional and Related	28,189	30,377	2,188	7.8%	2,198	6,416	8,614		
15-0000	Computer and Mathematical Science Occupations	3,329	3,605	276	8.3%	276	735	1,011		
15-1000	Computer Specialists	3,082	3,343	261	8.5%	261	660	921		
15-1011	Computer and Information Scientists, Research	1	2	1	100.0%	1	0	1	Master's	Master's + Work Exp.
15-1021	Computer Programmers	189	215	26	13.8%	26	38	64	Bachelor's	Bachelor's + Work Exp.
15-1031	Computer Software Engineers, Applications	226	259	33	14.6%	33	20	53	Bachelor's	Bachelor's + Work Exp.
15-1032	Computer Software Engineers, Systems Software	46	53	7	15.2%	7	4	11	Bachelor's	Bachelor's + Work Exp.
15-1041	Computer Support Specialists	488	532	44	9.0%	44	141	185	Post-sec.	Bachelor's
15-1051	Computer Systems Analysts	252	275	23	9.1%	23	57	80	Bachelor's	Bachelor's + Work Exp.
15-1061	Database Administrators	48	57	9	18.8%	9	9	18	Bachelor's	Master's
15-1071	Network and Computer Systems Administrators	243	270	27	11.1%	27	43	70	Bachelor's	Bachelor's + Work Exp.
15-1081	Network Systems and Data Communications Analysts	112	124	12	10.7%	12	21	33	Bachelor's	Bachelor's + Work Exp.
15-1099	Computer Specialists, All Other	1,477	1,556	79	5.3%	79	327	406	Post-sec.	Bachelor's

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	Employment 2018	Employment Change	Employment Percent Change	2008-2018 Openings Due to Growth	2008-2018 Openings Due to Replacement	2008-2018 Openings Total	Minimum Education	Competitive Education
15-2000	Mathematical Science Occupations	247	262	15	6.1%	15	75	90		
15-2011	Actuaries	16	17	1	6.3%	1	5	6	Bachelor's	Master's
15-2031	Operations Research Analysts	16	18	2	12.5%	2	5	7	Bachelor's	Master's
15-2041	Statisticians	215	227	12	5.6%	12	65	77	Bachelor's	Master's
17-0000	Architecture and Engineering Occupations	1,898	2,036	138	7.3%	138	404	542		
17-1000	Architects, Surveyors, and Cartographers	172	190	18	10.5%	18	41	59		
17-1011	Architects, Except Landscape and Naval	59	66	7	11.9%	7	11	18	Bachelor's	Master's
17-1012	Landscape Architects	7	8	1	14.3%	1	1	2	Bachelor's	Bachelor's + Work Exp.
17-1021	Cartographers and Photogrammetrists	33	35	2	6.1%	2	9	11	Bachelor's	Bachelor's + Work Exp.
17-1022	Surveyors	73	81	8	11.0%	8	20	28	Bachelor's	Bachelor's + Work Exp.
17-2000	Engineers	935	996	61	6.5%	61	202	263		
17-2011	Aerospace Engineers	7	8	1	14.3%	1	2	3	Bachelor's	Master's
17-2021	Agricultural Engineers	13	13	0	0.0%	0	3	3	Bachelor's	Master's
17-2031	Biomedical Engineers	5	5	0	0.0%	0	1	1	Bachelor's	Master's
17-2041	Chemical Engineers	5	5	0	0.0%	0	1	1	Bachelor's	Master's
17-2051	Civil Engineers	380	414	34	8.9%	34	67	101	Bachelor's	Master's
17-2061	Computer Hardware Engineers	13	14	1	7.7%	1	4	5	Bachelor's	Master's
17-2071	Electrical Engineers	67	68	1	1.5%	1	15	16	Bachelor's	Master's
17-2072	Electronics Engineers, Except Computer	90	98	8	8.9%	8	22	30	Bachelor's	Master's
17-2081	Environmental Engineers	8	10	2	25.0%	2	2	4	Bachelor's	Master's
17-2111	Health and Safety Engineers, Except Mining Safety Engineers and Inspectors	14	15	1	7.1%	1	4	5	Bachelor's	Master's
17-2112	Industrial Engineers	84	85	1	1.2%	1	22	23	Bachelor's	Master's
17-2131	Materials Engineers	6	6	0	0.0%	0	1	1	Bachelor's	Master's
17-2141	Mechanical Engineers	137	146	9	6.6%	9	36	45	Bachelor's	Master's
17-2199	Engineers, All Other	106	109	3	2.8%	3	22	25	Bachelor's	Master's
17-3000	Drafters, Engineering, and Mapping Technicians	791	850	59	7.5%	59	161	220		
17-3011	Architectural and Civil Drafters	124	135	11	8.9%	11	28	39	Post-sec.	Post-sec. + Work Exp.
17-3012	Electrical and Electronics Drafters	9	10	1	11.1%	1	2	3	Post-sec.	Post-sec. + Work Exp.
17-3013	Mechanical Drafters	60	66	6	10.0%	6	14	20	Post-sec.	Post-sec. + Work Exp.
17-3019	Drafters, All Other	39	39	0	0.0%	0	8	8	Post-sec.	Post-sec. + Work Exp.
17-3022	Civil Engineering Technicians	213	229	16	7.5%	16	42	58	Assoc.	Assoc. + Work Exp.
17-3023	Electrical and Electronic Engineering Technicians	128	133	5	3.9%	5	25	30	Assoc.	Assoc. + Work Exp.
17-3024	Electro-Mechanical Technicians	5	5	0	0.0%	0	1	1	Assoc.	Assoc. + Work Exp.
17-3025	Environmental Engineering Technicians	10	12	2	20.0%	2	2	4	Assoc.	Assoc. + Work Exp.
17-3026	Industrial Engineering Technicians	24	24	0	0.0%	0	5	5	Assoc.	Assoc. + Work Exp.
17-3027	Mechanical Engineering Technicians	26	29	3	11.5%	3	5	8	Assoc.	Assoc. + Work Exp.
17-3029	Engineering Technicians, All Other	40	41	1	2.5%	1	8	9	Assoc.	Assoc. + Work Exp.
17-3031	Surveying and Mapping Technicians	113	127	14	12.4%	14	21	35	Moderate OJT	Post-sec.
19-0000	Life, Physical, and Social Science Occupations	2,013	2,128	115	5.7%	120	612	732		
19-1000	Life Scientists	673	691	18	2.7%	23	124	147		
19-1011	Animal Scientists	1	1	0	0.0%	0	0	0	Bachelor's	Master's
19-1012	Food Scientists and Technologists	15	16	1	6.7%	1	5	6	Bachelor's	Master's
19-1013	Soil and Plant Scientists	46	53	7	15.2%	7	17	24	Bachelor's	Master's
19-1023	Zoologists and Wildlife Biologists	56	60	4	7.1%	4	19	23	Bachelor's	Master's
19-1029	Biological Scientists, All Other	80	80	0	0.0%	0	26	26	Bachelor's	Bachelor's + Work Exp.

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	Employment 2018	Employment Change	Employment Percent Change	2008-2018 Openings Due to Growth	2008-2018 Openings Due to Replacement	2008-2018 Openings Total	Minimum Education	Competitive Education
19-1031	Conservation Scientists	63	65	2	3.2%	2	7	9	Bachelor's	Master's
19-1032	Foresters	357	352	-5	-1.4%	0	38	38	Bachelor's	Master's
19-1041	Epidemiologists	4	4	0	0.0%	0	1	1	PhD	PhD + Work Exp.
19-1042	Medical Scientists, Except Epidemiologists	26	33	7	26.9%	7	6	13	PhD	PhD + Work Exp.
19-1099	Life Scientists, All Other	25	27	2	8.0%	2	5	7	Bachelor's	Master's
19-2000	Physical Scientists	219	236	17	7.8%	17	68	85		
19-2012	Physicists	7	7	0	0.0%	0	2	2	Master's	PhD
19-2031	Chemists	56	62	6	10.7%	6	20	26	Bachelor's	Master's
19-2032	Materials Scientists	1	1	0	0.0%	0	0	0	Bachelor's	Master's
19-2041	Environmental Scientists and Specialists, Including Health	132	141	9	6.8%	9	39	48	Bachelor's	Master's
19-2042	Geoscientists, Except Hydrologists and Geographers	13	15	2	15.4%	2	4	6	Bachelor's	Master's
19-2043	Hydrologists	6	6	0	0.0%	0	2	2	Bachelor's	Master's
19-2099	Physical Scientists, All Other	4	4	0	0.0%	0	1	1	Bachelor's	Master's
19-3000	Social Scientists and Related Workers	400	451	51	12.8%	51	123	174		
19-3011	Economists	58	62	4	6.9%	4	17	21	Bachelor's	Master's
19-3021	Market Research Analysts	44	50	6	13.6%	6	13	19	Bachelor's	Master's
19-3022	Survey Researchers	3	3	0	0.0%	0	1	1	Bachelor's	Master's
19-3031	Clinical, Counseling, and School Psychologists	106	134	28	26.4%	28	34	62	Master's	PhD
19-3032	Industrial-Organizational Psychologists	1	1	0	0.0%	0	0	0	Master's	PhD
19-3039	Psychologists, All Other	10	11	1	10.0%	1	3	4	Master's	PhD
19-3041	Sociologists	4	5	1	25.0%	1	1	2	Master's	PhD
19-3051	Urban and Regional Planners	113	122	9	8.0%	9	23	32	Bachelor's	Master's
19-3091	Anthropologists and Archeologists	8	8	0	0.0%	0	4	4	Bachelor's	Master's
19-3092	Geographers	2	2	0	0.0%	0	1	1	Bachelor's	Master's
19-3099	Social Scientists and Related Workers, All Other	51	53	2	3.9%	2	26	28	Bachelor's	Master's
19-4000	Life, Physical, and Social Science Technicians	721	750	29	4.0%	29	297	326		
19-4011	Agricultural and Food Science Technicians	78	84	6	7.7%	6	28	34	Assoc.	Assoc. + Work Exp.
19-4021	Biological Technicians	76	81	5	6.6%	5	28	33	Assoc.	Bachelor's
19-4031	Chemical Technicians	23	25	2	8.7%	2	5	7	Assoc.	Bachelor's
19-4061	Social Science Research Assistants	11	13	2	18.2%	2	5	7	Post-sec.	Bachelor's
19-4091	Environmental Science and Protection Technicians, Including Health	39	42	3	7.7%	3	17	20	Assoc.	Bachelor's
19-4092	Forensic Science Technicians	30	32	2	6.7%	2	13	15	Bachelor's	Master's
19-4093	Forest and Conservation Technicians	420	423	3	0.7%	3	181	184	Moderate OJT	Bachelor's
19-4099	Life, Physical, and Social Science Technicians, All Other	44	50	6	13.6%	6	20	26	Assoc.	Bachelor's
21-0000	Community and Social Service Occupations	4,294	4,856	562	13.1%	562	983	1,545		
21-1000	Counselors, Social Workers, and Other Community and Social Service Specialists	3,483	3,989	506	14.5%	506	819	1,325		
21-1011	Substance Abuse and Behavioral Disorder Counselors	266	323	57	21.4%	57	60	117	Assoc.	Bachelor's
21-1012	Educational, Vocational, and School Counselors	365	388	23	6.3%	23	76	99	Master's	Master's + Work Exp.
21-1013	Marriage and Family Therapists	33	44	11	33.3%	11	8	19	Master's	Master's + Work Exp.
21-1014	Mental Health Counselors	146	178	32	21.9%	32	33	65	Master's	Master's + Work Exp.
21-1015	Rehabilitation Counselors	230	269	39	17.0%	39	50	89	Master's	Master's + Work Exp.
21-1019	Counselors, All Other	10	12	2	20.0%	2	2	4	Master's	Master's + Work Exp.
21-1021	Child, Family, and School Social Workers	410	469	59	14.4%	59	110	169	Bachelor's	Master's
21-1022	Medical and Public Health Social Workers	96	120	24	25.0%	24	27	51	Bachelor's	Master's

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	2018	Change	Percent Change	2008-2018 Openings Due to Growth	Due to Replacement	Total	Minimum Education	Competitive Education
21-1023	Mental Health and Substance Abuse Social Workers	246	294	48	19.5%	48	68	116	Master's	Master's + Work Exp.
21-1029	Social Workers, All Other	152	174	22	14.5%	22	41	63	Bachelor's	Master's
21-1091	Health Educators	69	82	13	18.8%	13	16	29	Bachelor's	Master's
21-1092	Probation Officers and Correctional Treatment Specialists	541	579	38	7.0%	38	119	157	Bachelor's	Bachelor's + Work Exp.
21-1093	Social and Human Service Assistants	700	822	122	17.4%	122	161	283	Moderate OJT	Assoc.
21-1099	Community and Social Service Specialists, All Other	219	235	16	7.3%	16	48	64	Moderate OJT	Assoc.
21-2000	Religious Workers	811	867	56	6.9%	56	164	220		
21-2011	Clergy	514	551	37	7.2%	37	105	142	Bachelor's	1st Prof.
21-2021	Directors, Religious Activities and Education	224	237	13	5.8%	13	47	60	Bachelor's	Bachelor's + Work Exp.
21-2099	Religious Workers, All Other	73	79	6	8.2%	6	12	18	Bachelor's	Bachelor's + Work Exp.
23-0000	Legal Occupations	1,395	1,539	144	10.3%	144	245	389		
23-1000	Lawyers, Judges, and Related Workers	917	1,003	86	9.4%	86	179	265		
23-1011	Lawyers	761	836	75	9.9%	75	149	224	1st Prof.	1st Prof. + Work Exp.
23-1021	Administrative Law Judges, Adjudicators, and Hearing Officers	68	72	4	5.9%	4	13	17	1st Prof.	1st Prof. + Work Exp.
23-1022	Arbitrators, Mediators, and Conciliators	18	21	3	16.7%	3	4	7	Bachelor's	1st Prof.
23-1023	Judges and Magistrates	70	74	4	5.7%	4	13	17	1st Prof.	1st Prof. + Work Exp.
23-2000	Legal Support Workers	478	536	58	12.1%	58	66	124		
23-2011	Paralegals and Legal Assistants	241	268	27	11.2%	27	29	56	Assoc.	Bachelor's
23-2091	Court Reporters	24	26	2	8.3%	2	4	6	Post-sec.	Post-sec. + Work Exp.
23-2092	Law Clerks	64	70	6	9.4%	6	10	16	Bachelor's	Bachelor's + Work Exp.
23-2093	Title Examiners, Abstractors, and Searchers	116	133	17	14.7%	17	18	35	Moderate OJT	Post-sec.
23-2099	Legal Support Workers, All Other	33	39	6	18.2%	6	5	11	Post-sec.	Assoc.
25-0000	Education, Training, and Library Occupations	13,468	14,266	798	5.9%	798	2,980	3,778		
25-1000	Postsecondary Teachers	2,763	2,944	181	6.6%	181	497	678		
25-1191	Graduate Teaching Assistants	27	28	1	3.7%	1	5	6	Bachelor's	Master's
25-1199	Postsecondary Teachers, Except Graduate Teaching Assistants	2,736	2,916	180	6.6%	180	492	672	Master's	PhD
25-2000	Primary, Secondary, and Special Education Teachers	5,380	5,709	329	6.1%	329	1,344	1,673		
25-2011	Preschool Teachers, Except Special Education	567	667	100	17.6%	100	124	224	Post-sec.	Bachelor's
25-2012	Kindergarten Teachers, Except Special Education	220	234	14	6.4%	14	46	60	Bachelor's	Master's
25-2021	Elementary School Teachers, Except Special Education	1,858	1,944	86	4.6%	86	432	518	Bachelor's	Master's
25-2022	Middle School Teachers, Except Special and Vocational Education	908	948	40	4.4%	40	211	251	Bachelor's	Master's
25-2023	Vocational Education Teachers, Middle School	14	14	0	0.0%	0	3	3	Bachelor's	Master's
25-2031	Secondary School Teachers, Except Special and Vocational Education	1,411	1,478	67	4.7%	67	420	487	Bachelor's	Master's
25-2032	Vocational Education Teachers, Secondary School	36	39	3	8.3%	3	11	14	Bachelor's	Master's
25-2041	Special Education Teachers, Preschool, Kindergarten, and Elementary School	218	231	13	6.0%	13	58	71	Bachelor's	Master's
25-2042	Special Education Teachers, Middle School	71	74	3	4.2%	3	19	22	Bachelor's	Master's
25-2043	Special Education Teachers, Secondary School	77	80	3	3.9%	3	20	23	Bachelor's	Master's
25-3000	Other Teachers and Instructors	1,583	1,650	67	4.2%	67	248	315		
25-3011	Adult Literacy, Remedial Education, and GED Teachers and Instructors	87	94	7	8.0%	7	14	21	Bachelor's	Master's
25-3021	Self-Enrichment Education Teachers	171	183	12	7.0%	12	27	39	Work Exp.	Post-sec.

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	2018	Change	Percent Change	2008-2018 Openings Due to Growth	Due to Replacement	Total	Minimum Education	Competitive Education
25-3099	Teachers and Instructors, All Other	1,325	1,373	48	3.6%	48	207	255	Bachelor's	Master's
25-4000	Librarians, Curators, and Archivists	480	519	39	8.1%	39	172	211		
25-4011	Archivists	15	16	1	6.7%	1	5	6	Master's	Master's + Work Exp.
25-4012	Curators	15	17	2	13.3%	2	5	7	Master's	Master's + Work Exp.
25-4013	Museum Technicians and Conservators	5	5	0	0.0%	0	1	1	Bachelor's	Master's
25-4021	Librarians	242	261	19	7.9%	19	66	85	Master's	Master's + Work Exp.
25-4031	Library Technicians	203	220	17	8.4%	17	95	112	Moderate OJT	Assoc.
25-9000	Other Education, Training, and Library Occupations	3,262	3,444	182	5.6%	182	719	901		
25-9011	Audio-Visual Specialists, Education-related	43	45	2	4.7%	2	10	12	Moderate OJT	Assoc.
25-9021	Farm and Home Management Advisors	3	3	0	0.0%	0	1	1	Bachelor's	Bachelor's + Work Exp.
25-9031	Instructional Coordinators	224	236	12	5.4%	12	51	63	Bachelor's	Master's
25-9041	Teacher Assistants	2,269	2,400	131	5.8%	131	494	625	Work Exp.	Assoc.
25-9099	Education, Training, and Library, All Other	723	760	37	5.1%	37	163	200	Bachelor's	Bachelor's + Work Exp.
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	1,792	1,947	155	8.6%	160	457	617		
27-1000	Art and Design Workers	432	475	43	10.0%	43	135	178		
27-1011	Art Directors	20	22	2	10.0%	2	5	7	Bachelor's	Master's
27-1012	Craft Artists	8	9	1	12.5%	1	2	3	Moderate OJT	Post-sec.
27-1013	Fine Artists, Including Painters, Sculptors, and Illustrators	12	14	2	16.7%	2	3	5	Long OJT	Bachelor's
27-1014	Multi-Media Artists and Animators	6	7	1	16.7%	1	1	2	Bachelor's	Master's
27-1019	Artists and Related Workers, All Other	4	4	0	0.0%	0	1	1	Bachelor's	Master's
27-1021	Commercial and Industrial Designers	6	6	0	0.0%	0	2	2	Bachelor's	Bachelor's + Work Exp.
27-1022	Fashion Designers	4	4	0	0.0%	0	1	1	Bachelor's	Bachelor's + Work Exp.
27-1023	Floral Designers	79	88	9	11.4%	9	26	35	Moderate OJT	Post-sec.
27-1024	Graphic Designers	156	165	9	5.8%	9	49	58	Assoc.	Bachelor's
27-1025	Interior Designers	30	35	5	16.7%	5	10	15	Assoc.	Bachelor's
27-1026	Merchandise Displayers and Window Trimmers	92	105	13	14.1%	13	30	43	Moderate OJT	Assoc.
27-1027	Set and Exhibit Designers	12	12	0	0.0%	0	4	4	Bachelor's	Bachelor's + Work Exp.
27-1029	Designers, All Other	3	4	1	33.3%	1	1	2	Post-sec.	Bachelor's
27-2000	Entertainers and Performers, Sports, and Related Workers	564	615	51	9.0%	51	123	174		
27-2011	Actors	5	6	1	20.0%	1	1	2	Long OJT	Post-sec.
27-2012	Producers and Directors	33	34	1	3.0%	1	10	11	Bachelor's	Bachelor's + Work Exp.
27-2021	Athletes and Sports Competitors	19	20	1	5.3%	1	4	5	Long OJT	Post-sec.
27-2022	Coaches and Scouts	292	324	32	11.0%	32	59	91	Long OJT	Bachelor's
27-2023	Umpires, Referees, and Other Sports Officials	15	17	2	13.3%	2	3	5	Long OJT	Bachelor's
27-2032	Choreographers	14	15	1	7.1%	1	7	8	Work Exp.	Assoc.
27-2041	Music Directors and Composers	77	82	5	6.5%	5	16	21	Bachelor's	Master's
27-2042	Musicians and Singers	95	102	7	7.4%	7	20	27	Long OJT	Assoc.
27-2099	Entertainers and Performers, Sports and Related Workers, All Other	14	15	1	7.1%	1	3	4	Long OJT	Assoc.
27-3000	Media and Communication Workers	617	657	40	6.5%	45	153	198		
27-3011	Radio and Television Announcers	16	16	0	0.0%	0	4	4	Moderate OJT	Bachelor's
27-3012	Public Address System and Other Announcers	15	17	2	13.3%	2	4	6	Long OJT	Bachelor's
27-3022	Reporters and Correspondents	60	55	-5	-8.3%	0	16	16	Bachelor's	Bachelor's + Work Exp.
27-3031	Public Relations Specialists	254	276	22	8.7%	22	63	85	Bachelor's	Bachelor's + Work Exp.
27-3041	Editors	84	84	0	0.0%	0	22	22	Bachelor's	Bachelor's + Work Exp.
27-3042	Technical Writers	31	34	3	9.7%	3	5	8	Bachelor's	Bachelor's + Work Exp.

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	Employment 2018	Employment Change	Employment Percent Change	2008-2018 Openings Due to Growth	2008-2018 Openings Due to Replacement	2008-2018 Openings Total	Minimum Education	Competitive Education
27-3043	Writers and Authors	31	32	1	3.2%	1	7	8	Bachelor's	Bachelor's + Work Exp.
27-3091	Interpreters and Translators	100	114	14	14.0%	14	25	39	Long OJT	Bachelor's
27-3099	Media and Communication Workers, All Other	26	29	3	11.5%	3	7	10	Bachelor's	Bachelor's + Work Exp.
27-4000	Media and Communication Equipment Workers	179	200	21	11.7%	21	46	67		
27-4011	Audio and Video Equipment Technicians	48	50	2	4.2%	2	15	17	Long OJT	Post-sec.
27-4012	Broadcast Technicians	13	13	0	0.0%	0	4	4	Assoc.	Bachelor's
27-4014	Sound Engineering Technicians	6	6	0	0.0%	0	2	2	Post-sec.	Post-sec. + Work Exp.
27-4021	Photographers	92	111	19	20.7%	19	20	39	Long OJT	Bachelor's
27-4031	Camera Operators, Television, Video, and Motion Picture	9	9	0	0.0%	0	2	2	Moderate OJT	Assoc.
27-4032	Film and Video Editors	3	3	0	0.0%	0	1	1	Assoc.	Bachelor's
27-4099	Media and Communication Equipment Workers, All Other	8	8	0	0.0%	0	2	2	Moderate OJT	Work Exp.
	Health Care	12,989	16,690	3,701	28.5%	3,701	2,503	6,204		
29-0000	Healthcare Practitioner and Technical Occupations	8,081	10,295	2,214	27.4%	2,214	1,863	4,077		
29-1000	Health Diagnosing and Treating Practitioners	4,884	6,223	1,339	27.4%	1,339	1,029	2,368		
29-1011	Chiropractors	54	73	19	35.2%	19	11	30	1st Prof.	1st Prof. + Work Exp.
29-1021	Dentists, General	109	142	33	30.3%	33	35	68	1st Prof.	1st Prof. + Work Exp.
29-1029	Dentists, All Other	32	43	11	34.4%	11	10	21	1st Prof.	1st Prof. + Work Exp.
29-1031	Dietitians and Nutritionists	77	94	17	22.1%	17	29	46	Bachelor's	Bachelor's + Work Exp.
29-1041	Optometrists	47	60	13	27.7%	13	18	31	1st Prof.	1st Prof. + Work Exp.
29-1051	Pharmacists	322	376	54	16.8%	54	77	131	1st Prof.	1st Prof. + Work Exp.
29-1060	Physicians and Surgeons	623	821	198	31.8%	198	127	325	1st Prof.	1st Prof. + Work Exp.
29-1071	Physician Assistants	68	91	23	33.8%	23	14	37	Bachelor's	Master's
29-1081	Podiatrists	4	7	3	75.0%	3	1	4	1st Prof.	1st Prof. + Work Exp.
29-1111	Registered Nurses	2,906	3,712	806	27.7%	806	578	1,384	Assoc.	Bachelor's
29-1121	Audiologists	22	26	4	18.2%	4	5	9	Master's	PhD
29-1122	Occupational Therapists	80	102	22	27.5%	22	17	39	Master's	Master's + Work Exp.
29-1123	Physical Therapists	178	232	54	30.3%	54	25	79	Master's	PhD
29-1124	Radiation Therapists	16	20	4	25.0%	4	3	7	Assoc.	Bachelor's
29-1125	Recreational Therapists	44	57	13	29.5%	13	18	31	Bachelor's	Bachelor's + Work Exp.
29-1126	Respiratory Therapists	81	101	20	24.7%	20	17	37	Assoc.	Bachelor's
29-1127	Speech and Language Pathologists	84	95	11	13.1%	11	16	27	Master's	PhD
29-1129	Therapists, All Other	25	31	6	24.0%	6	6	12	Bachelor's	Master's
29-1131	Veterinarians	97	121	24	24.7%	24	19	43	1st Prof.	1st Prof. + Work Exp.
29-1199	Health Diagnosing and Treating Practitioners, All Other	15	19	4	26.7%	4	3	7	1st Prof.	1st Prof. + Work Exp.
29-2000	Health Technologists and Technicians	2,991	3,842	851	28.5%	851	761	1,612		
29-2011	Medical and Clinical Laboratory Technologists	165	213	48	29.1%	48	36	84	Post-sec.	Bachelor's
29-2012	Medical and Clinical Laboratory Technicians	109	145	36	33.0%	36	24	60	Assoc.	Assoc. + Work Exp.
29-2021	Dental Hygienists	308	415	107	34.7%	107	74	181	Assoc.	Bachelor's
29-2031	Cardiovascular Technologists and Technicians	44	55	11	25.0%	11	7	18	Assoc.	Assoc. + Work Exp.
29-2032	Diagnostic Medical Sonographers and Ultrasound Technologists	55	73	18	32.7%	18	9	27	Assoc.	Bachelor's
29-2033	Nuclear Medicine Technologists	12	16	4	33.3%	4	2	6	Assoc.	Bachelor's
29-2034	Radiologic, CAT, and MRI Technologists and Technicians	234	303	69	29.5%	69	39	108	Assoc.	Bachelor's
29-2041	Emergency Medical Technicians and Paramedics	230	290	60	26.1%	60	53	113	Post-sec.	Post-sec. + Work Exp.
29-2051	Dietetic Technicians	7	9	2	28.6%	2	2	4	Moderate OJT	Assoc.
29-2052	Pharmacy Technicians	494	577	83	16.8%	83	135	218	Post-sec.	Assoc.

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	2018	Change	Percent Change	2008-2018 Openings Due to Growth	Due to Replacement	Total	Minimum Education	Competitive Education
29-2053	Psychiatric Technicians	275	404	129	46.9%	129	86	215	Post-sec.	Assoc.
29-2055	Surgical Technologists	89	116	27	30.3%	27	26	53	Post-sec.	Assoc.
29-2056	Veterinary Technologists and Technicians	127	159	32	25.2%	32	36	68	Moderate OJT	Post-sec.
29-2061	Licensed Practical and Licensed Vocational Nurses	299	379	80	26.8%	80	106	186	Post-sec.	Post-sec. + Work Exp.
29-2071	Medical Records and Health Information Technicians	312	404	92	29.5%	92	73	165	Post-sec.	Assoc.
29-2081	Opticians, Dispensing	83	105	22	26.5%	22	19	41	Long OJT	Post-sec.
29-2091	Orthotists and Prosthetists	18	19	1	5.6%	1	4	5	Bachelor's	Bachelor's + Work Exp.
29-2099	Health Technologists and Technicians, All Other	130	160	30	23.1%	30	30	60	Post-sec.	Post-sec. + Work Exp.
29-9000	Other Healthcare Practioner and Technical Occupations	206	230	24	11.7%	24	73	97		
29-9011	Occupational Health and Safety Specialists	102	110	8	7.8%	8	35	43	Bachelor's	Master's
29-9012	Occupational Health and Safety Technicians	35	37	2	5.7%	2	12	14	Bachelor's	Bachelor's + Work Exp.
29-9091	Athletic Trainers	29	34	5	17.2%	5	11	16	Bachelor's	Master's
29-9099	Healthcare Practitioner and Technical Workers, All Other	40	49	9	22.5%	9	15	24	Assoc.	Assoc. + Work Exp.
31-0000	Healthcare Support Occupations	4,908	6,395	1,487	30.3%	1,487	640	2,127		
31-1000	Nursing, Psychiatric, and Home Health Aides	2,850	3,700	850	29.8%	850	326	1,176		
31-1011	Home Health Aides	868	1,123	255	29.4%	255	99	354	Short OJT	Post-sec.
31-1012	Nursing Aides, Orderlies, and Attendants	1,769	2,280	511	28.9%	511	202	713	Short OJT	Post-sec.
31-1013	Psychiatric Aides	213	297	84	39.4%	84	25	109	Short OJT	Work Exp.
31-2000	Occupational and Physical Therapy Assistants and Aides	145	188	43	29.7%	43	24	67		
31-2011	Occupational Therapist Assistants	18	23	5	27.8%	5	3	8	Assoc.	Assoc. + Work Exp.
31-2012	Occupational Therapist Aides	3	4	1	33.3%	1	1	2	Short OJT	Post-sec.
31-2021	Physical Therapist Assistants	50	65	15	30.0%	15	8	23	Assoc.	Assoc. + Work Exp.
31-2022	Physical Therapist Aides	74	96	22	29.7%	22	12	34	Short OJT	Assoc.
31-9000	Other Healthcare Support Occupations	1,913	2,507	594	31.1%	594	290	884		
31-9011	Massage Therapists	39	47	8	20.5%	8	6	14	Post-sec.	Post-sec. + Work Exp.
31-9091	Dental Assistants	485	649	164	33.8%	164	106	270	Moderate OJT	Post-sec.
31-9092	Medical Assistants	793	1,063	270	34.0%	270	103	373	Moderate OJT	Post-sec.
31-9093	Medical Equipment Preparers	47	61	14	29.8%	14	6	20	Post-sec.	Post-sec. + Work Exp.
31-9094	Medical Transcriptionists	139	172	33	23.7%	33	17	50	Post-sec.	Assoc.
31-9096	Veterinary Assistants and Laboratory Animal Caretakers	126	157	31	24.6%	31	16	47	Short OJT	Post-sec.
31-9099	Healthcare Support Workers, All Other	284	358	74	26.1%	74	36	110	Short OJT	Post-sec.
	Service	30,767	34,831	4,064	13.2%	4,068	9,572	13,640		
33-0000	Protective Service Occupations	4,090	4,478	388	9.5%	388	1,247	1,635		
33-1000	Supervisors, Protective Service Workers	414	457	43	10.4%	43	185	228		
33-1011	Supervisors and Managers of Correctional Officers	104	112	8	7.7%	8	39	47	Work Exp.	Bachelor's
33-1012	Supervisors and Managers of Police and Detectives	157	174	17	10.8%	17	72	89	Work Exp.	Bachelor's + Work Exp.
33-1021	Supervisors and Managers of Fire Fighting and Prevention Workers	103	115	12	11.7%	12	55	67	Work Exp.	Bachelor's + Work Exp.
33-1099	Supervisors and Managers, Protective Service Workers, All Other	50	56	6	12.0%	6	19	25	Work Exp.	Bachelor's
33-2000	Firefighting and Prevention Workers	378	422	44	11.6%	44	122	166		
33-2011	Fire Fighters	360	403	43	11.9%	43	117	160	Post-sec.	Assoc.
33-2021	Fire Inspectors and Investigators	12	13	1	8.3%	1	3	4	Post-sec.	Post-sec. + Work Exp.
33-2022	Forest Fire Inspectors and Prevention Specialists	6	6	0	0.0%	0	2	2	Work Exp.	Assoc.
33-3000	Law Enforcement Workers	1,963	2,124	161	8.2%	161	478	639		
33-3011	Bailiffs	7	8	1	14.3%	1	2	3	Moderate OJT	Work Exp.

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	Employment 2018	Employment Change	Employment Percent Change	2008-2018 Openings Due to Growth	2008-2018 Openings Due to Replacement	2008-2018 Openings Total	Minimum Education	Competitive Education
33-3012	Correctional Officers	1,105	1,181	76	6.9%	76	253	329	Moderate OJT	Post-sec.
33-3021	Detectives and Criminal Investigators	125	132	7	5.6%	7	26	33	Assoc.	Bachelor's
33-3031	Fish and Game Wardens	1	1	0	0.0%	0	0	0	Assoc.	Bachelor's
33-3041	Parking Enforcement Workers	22	24	2	9.1%	2	6	8	Short OJT	Work Exp.
33-3051	Police and Sheriff's Patrol Officers	703	778	75	10.7%	75	191	266	Long OJT	Assoc.
33-9000	Other Protective Service Workers	1,335	1,475	140	10.5%	140	462	602		
33-9011	Animal Control Workers	15	16	1	6.7%	1	4	5	Moderate OJT	Work Exp.
33-9021	Private Detectives and Investigators	16	18	2	12.5%	2	3	5	Work Exp.	Assoc.
33-9031	Gaming Surveillance Officers and Gaming Investigators	86	93	7	8.1%	7	18	25	Moderate OJT	Work Exp.
33-9032	Security Guards	640	705	65	10.2%	65	138	203	Short OJT	Post-sec.
33-9091	Crossing Guards	264	296	32	12.1%	32	76	108	Short OJT	Work Exp.
33-9092	Lifeguards, Ski Patrol, and Other Recreational Protective Service Workers	183	203	20	10.9%	20	130	150	Short OJT	Work Exp.
33-9099	Protective Service Workers, All Other	131	144	13	9.9%	13	93	106	Short OJT	Work Exp.
35-0000	Food Preparation and Serving Related Occupations	15,875	18,001	2,126	13.4%	2,126	6,010	8,136		
35-1000	Supervisors, Food Preparation and Food Serving Workers	1,187	1,345	158	13.3%	158	121	279		
35-1011	Chefs and Head Cooks	126	140	14	11.1%	14	13	27	Post-sec.	Post-sec. + Work Exp.
35-1012	Supervisors and Managers of Food Preparation and Serving Workers	1,061	1,205	144	13.6%	144	108	252	Work Exp.	Post-sec.
35-2000	Cooks and Food Preparation Workers	4,095	4,651	556	13.6%	556	1,255	1,811		
35-2011	Cooks, Fast Food	790	899	109	13.8%	109	216	325	Short OJT	Work Exp.
35-2012	Cooks, Institution and Cafeteria	730	845	115	15.8%	115	201	316	Moderate OJT	Work Exp.
35-2014	Cooks, Restaurant	1,176	1,317	141	12.0%	141	319	460	Moderate OJT	Work Exp.
35-2015	Cooks, Short Order	137	154	17	12.4%	17	37	54	Short OJT	Work Exp.
35-2019	Cooks, All Other	8	9	1	12.5%	1	2	3	Moderate OJT	Work Exp.
35-2021	Food Preparation Workers	1,254	1,427	173	13.8%	173	480	653	Short OJT	Work Exp.
35-3000	Food and Beverage Serving Workers	8,676	9,830	1,154	13.3%	1,154	3,632	4,786		
35-3011	Bartenders	713	787	74	10.4%	74	267	341	Short OJT	Post-sec.
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	3,955	4,518	563	14.2%	563	898	1,461	Short OJT	Work Exp.
35-3022	Counter Attendants in Cafeterias, Food Concessions, and Coffee Shops	1,274	1,422	148	11.6%	148	990	1,138	Short OJT	Work Exp.
35-3031	Waiters and Waitresses	2,424	2,710	286	11.8%	286	1,417	1,703	Short OJT	Work Exp.
35-3041	Food Servers, Nonrestaurant	310	393	83	26.8%	83	60	143	Short OJT	Work Exp.
35-9000	Other Food Preparation and Serving Related Workers	1,917	2,175	258	13.5%	258	1,002	1,260		
35-9011	Dining Room and Cafeteria Attendants and Bartender Helpers	512	584	72	14.1%	72	238	310	Short OJT	Work Exp.
35-9021	Dishwashers	789	897	108	13.7%	108	347	455	Short OJT	Work Exp.
35-9031	Hosts and Hostesses in Restaurants, Lounges, and Coffee Shops	433	481	48	11.1%	48	318	366	Short OJT	Work Exp.
35-9099	Food Preparation and Serving Workers, All Other	183	213	30	16.4%	30	99	129	Short OJT	Work Exp.
37-0000	Building and Grounds Cleaning and Maintenance Workers	6,407	7,276	869	13.6%	869	1,113	1,982		
37-1000	Supervisors, Building and Grounds Cleaning and Maintenance Workers	366	427	61	16.7%	61	42	103		
37-1011	Supervisors and Managers of Housekeeping and Janitorial Workers	214	255	41	19.2%	41	24	65	Work Exp.	Post-sec.

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	Employment 2018	Employment Change	Employment Percent Change	2008-2018 Openings Due to Growth	2008-2018 Openings Due to Replacement	2008-2018 Openings Total	Minimum Education	Competitive Education
37-1012	Supervisors and Managers of Landscaping and Groundskeeping Workers	152	172	20	13.2%	20	18	38	Work Exp.	Post-sec.
37-2000	Building Cleaning and Pest Control Workers	3,974	4,554	580	14.6%	580	808	1,388		
37-2011	Janitors and Cleaners	2,975	3,294	319	10.7%	319	592	911	Short OJT	Work Exp.
37-2012	Maids and Housekeeping Cleaners	915	1,166	251	27.4%	251	187	438	Short OJT	Work Exp.
37-2019	Building Cleaning Workers, All Other	15	16	1	6.7%	1	3	4	Short OJT	Work Exp.
37-2021	Pest Control Workers	69	78	9	13.0%	9	26	35	Moderate OJT	Work Exp.
37-3000	Grounds Maintenance Workers	2,067	2,295	228	11.0%	228	263	491		
37-3011	Landscaping and Groundskeeping Workers	1,304	1,483	179	13.7%	179	168	347	Short OJT	Work Exp.
37-3012	Pesticide Handlers, Sprayers, and Applicators; Vegetation	334	355	21	6.3%	21	41	62	Moderate OJT	Work Exp.
37-3013	Tree Trimmers and Pruners	394	415	21	5.3%	21	49	70	Short OJT	Work Exp.
37-3019	Grounds Maintenance Workers, All Other	35	42	7	20.0%	7	5	12	Short OJT	Work Exp.
39-0000	Personal Care and Service Occupations	4,395	5,076	681	15.5%	685	1,202	1,887		
39-1000	Supervisors, Personal Care and Service Workers	329	378	49	14.9%	49	91	140		
39-1011	Gaming Supervisors	66	72	6	9.1%	6	16	22	Long OJT	Work Exp.
39-1012	Slot Key Persons	50	55	5	10.0%	5	12	17	Short OJT	Work Exp.
39-1021	Supervisors and Managers of Personal Service Workers	213	251	38	17.8%	38	63	101	Work Exp.	Post-sec.
39-2000	Animal Care and Service Workers	178	201	23	12.9%	23	41	64		
39-2011	Animal Trainers	20	22	2	10.0%	2	4	6	Moderate OJT	Work Exp.
39-2021	Nonfarm Animal Caretakers	158	179	21	13.3%	21	37	58	Short OJT	Post-sec.
39-3000	Entertainment Attendants and Related Workers	860	964	104	12.1%	104	442	546		
39-3011	Gaming Dealers	252	276	24	9.5%	24	112	136	Short OJT	Work Exp.
39-3012	Gaming and Sports Book Writers and Runners	23	25	2	8.7%	2	10	12	Short OJT	Work Exp.
39-3019	Gaming Service Workers, All Other	65	71	6	9.2%	6	29	35	Short OJT	Work Exp.
39-3021	Motion Picture Projectionists	17	18	1	5.9%	1	7	8	Short OJT	Work Exp.
39-3031	Ushers, Lobby Attendants, and Ticket Takers	47	52	5	10.6%	5	31	36	Short OJT	Work Exp.
39-3091	Amusement and Recreation Attendants	295	330	35	11.9%	35	162	197	Short OJT	Work Exp.
39-3092	Costume Attendants	2	2	0	0.0%	0	1	1	Short OJT	Work Exp.
39-3093	Locker Room, Coatroom, and Dressing Room Attendants	20	23	3	15.0%	3	11	14	Short OJT	Work Exp.
39-3099	Entertainment Attendants and Related Workers, All Other	139	167	28	20.1%	28	79	107	Short OJT	Work Exp.
39-4000	Funeral Service Workers	16	18	2	12.5%	2	8	10		
39-4011	Embalmers	12	13	1	8.3%	1	6	7	Assoc.	Assoc. + Work Exp.
39-4021	Funeral Attendants	4	5	1	25.0%	1	2	3	Short OJT	Work Exp.
39-5000	Personal Appearance Workers	379	425	46	12.1%	46	60	106		
39-5011	Barbers	14	15	1	7.1%	1	2	3	Post-sec.	Post-sec. + Work Exp.
39-5012	Hairdressers, Hairstylists, and Cosmetologists	332	372	40	12.0%	40	52	92	Post-sec.	Post-sec. + Work Exp.
39-5092	Manicurists and Pedicurists	17	19	2	11.8%	2	3	5	Post-sec.	Post-sec. + Work Exp.
39-5094	Skin Care Specialists	16	19	3	18.8%	3	3	6	Post-sec.	Post-sec. + Work Exp.
39-6000	Transportation, Tourism, and Lodging Attendants	41	47	6	14.6%	6	12	18		
39-6011	Baggage Porters and Bellhops	15	19	4	26.7%	4	4	8	Short OJT	Work Exp.
39-6012	Concierges	12	14	2	16.7%	2	3	5	Short OJT	Work Exp.
39-6021	Tour Guides and Escorts	8	8	0	0.0%	0	3	3	Moderate OJT	Work Exp.
39-6022	Travel Guides	3	3	0	0.0%	0	1	1	Moderate OJT	Work Exp.
39-6031	Flight Attendants	3	3	0	0.0%	0	1	1	Long OJT	Bachelor's
39-9000	Other Personal Care and Service Workers	2,592	3,043	451	17.4%	455	548	1,003		
39-9011	Child Care Workers	652	734	82	12.6%	82	203	285	Short OJT	Post-sec.

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	2018	Change	Percent Change	2008-2018 Openings Due to Growth	Due to Replacement	Total	Minimum Education	Competitive Education
39-9021	Personal and Home Care Aides	1,035	1,282	247	23.9%	247	145	392	Short OJT	Post-sec.
39-9031	Fitness Trainers and Aerobics Instructors	267	303	36	13.5%	36	51	87	Work Exp.	Post-sec.
39-9032	Recreation Workers	422	501	79	18.7%	79	83	162	Short OJT	Bachelor's
39-9041	Residential Advisors	128	124	-4	-3.1%	0	45	45	Moderate OJT	Bachelor's
39-9099	Personal Care and Service Workers, All Other	88	99	11	12.5%	11	21	32	Short OJT	Work Exp.
	Sales and Related	18,006	19,911	1,905	10.6%	1,909	5,562	7,471		
41-0000	Sales and Related Occupations	18,006	19,911	1,905	10.6%	1,909	5,562	7,471		
41-1000	Supervisors, Sales and Related	2,082	2,299	217	10.4%	217	468	685		
41-1011	Supervisors and Managers of Retail Sales Workers	1,755	1,954	199	11.3%	199	398	597	Work Exp.	Post-sec.
41-1012	Supervisors and Managers of Non-Retail Sales Workers	327	345	18	5.5%	18	70	88	Work Exp.	Assoc.
41-2000	Retail Sales Workers	11,192	12,458	1,266	11.3%	1,266	4,029	5,295		
41-2011	Cashiers	3,884	4,373	489	12.6%	489	1,854	2,343	Short OJT	Work Exp.
41-2012	Gaming Change Persons and Booth Cashiers	36	40	4	11.1%	4	17	21	Short OJT	Work Exp.
41-2021	Counter and Rental Clerks	512	532	20	3.9%	20	139	159	Short OJT	Work Exp.
41-2022	Parts Salespersons	363	383	20	5.5%	20	132	152	Moderate OJT	Work Exp.
41-2031	Retail Salespersons	6,397	7,130	733	11.5%	733	1,887	2,620	Short OJT	Work Exp.
41-3000	Sales Representatives, Service	1,102	1,176	74	6.7%	78	270	348		
41-3011	Advertising Sales Agents	115	111	-4	-3.5%	0	22	22	Moderate OJT	Bachelor's
41-3021	Insurance Sales Agents	378	401	23	6.1%	23	90	113	Post-sec.	Post-sec. + Work Exp.
41-3031	Securities, Commodities, and Financial Services Sales Agents	172	180	8	4.7%	8	54	62	Bachelor's	Bachelor's + Work Exp.
41-3041	Travel Agents	55	56	1	1.8%	1	4	5	Moderate OJT	Post-sec.
41-3099	Sales Representatives, Services, All Other	382	428	46	12.0%	46	100	146	Moderate OJT	Post-sec.
41-4000	Sales Representatives, Wholesale and Manufacturing	1,400	1,505	105	7.5%	105	337	442		
41-4011	Wholesale and Manufacturing Sales Representatives; Technical and Scientific	230	251	21	9.1%	21	56	77	Work Exp.	Bachelor's
41-4012	Wholesale and Manufacturing Sales Representatives Non-technical and Scientific	1,170	1,254	84	7.2%	84	281	365	Work Exp.	Assoc.
41-9000	Other Sales and Related Workers	2,230	2,473	243	10.9%	243	458	701		
41-9011	Demonstrators and Product Promoters	215	243	28	13.0%	28	66	94	Short OJT	Work Exp.
41-9012	Models	6	6	0	0.0%	0	2	2	Moderate OJT	Work Exp.
41-9021	Real Estate Brokers	590	657	67	11.4%	67	102	169	Post-sec.	Post-sec. + Work Exp.
41-9022	Real Estate Sales Agents	866	967	101	11.7%	101	150	251	Post-sec.	Post-sec. + Work Exp.
41-9031	Sales Engineers	29	33	4	13.8%	4	11	15	Bachelor's	Master's
41-9041	Telemarketers	233	256	23	9.9%	23	61	84	Short OJT	Work Exp.
41-9091	Door-To-Door Sales Workers, News and Street Vendors, and Related Workers	21	22	1	4.8%	1	4	5	Short OJT	Work Exp.
41-9099	Sales and Related Workers, All Other	270	289	19	7.0%	19	62	81	Short OJT	Work Exp.
	Office and Administrative Support	30,998	34,105	3,107	10.0%	3,145	6,581	9,726		
43-0000	Office and Administrative Support Occupations	30,998	34,105	3,107	10.0%	3,145	6,581	9,726		
43-1000	Supervisors, Office and Administrative Support Workers	1,878	2,074	196	10.4%	196	446	642		
43-1011	Supervisors and Managers of Office and Administrative Support Workers	1,878	2,074	196	10.4%	196	446	642	Work Exp.	Assoc.
43-2000	Communication Equipment Workers	137	161	24	17.5%	24	31	55		
43-2011	Switchboard Operators, Including Answering Service	137	161	24	17.5%	24	31	55	Short OJT	Work Exp.
43-3000	Financial Clerks	5,068	5,601	533	10.5%	533	956	1,489		

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	Employment 2018	Employment Change	Employment Percent Change	2008-2018 Openings Due to Growth	2008-2018 Openings Due to Replacement	2008-2018 Openings Total	Minimum Education	Competitive Education
43-3011	Bill and Account Collectors	330	386	56	17.0%	56	67	123	Short OJT	Work Exp.
43-3021	Billing and Posting Clerks	610	733	123	20.2%	123	110	233	Short OJT	Work Exp.
43-3031	Bookkeeping, Accounting, and Auditing Clerks	2,995	3,275	280	9.3%	280	377	657	Post-sec.	Assoc.
43-3041	Gaming Cage Workers	105	114	9	8.6%	9	21	30	Short OJT	Work Exp.
43-3051	Payroll and Timekeeping Clerks	254	275	21	8.3%	21	63	84	Moderate OJT	Post-sec.
43-3061	Purchasing and Procurement Clerks	84	86	2	2.4%	2	26	28	Moderate OJT	Post-sec.
43-3071	Tellers	690	732	42	6.1%	42	292	334	Short OJT	Work Exp.
43-4000	Information and Record Clerks	7,087	7,935	848	12.0%	848	2,170	3,018		
43-4011	Brokerage Clerks	40	42	2	5.0%	2	12	14	Moderate OJT	Work Exp.
43-4021	Correspondence Clerks	29	31	2	6.9%	2	9	11	Short OJT	Post-sec.
43-4031	Court, Municipal, and License Clerks	298	317	19	6.4%	19	87	106	Short OJT	Post-sec.
43-4041	Credit Authorizers, Checkers, and Clerks	17	20	3	17.6%	3	5	8	Work Exp.	Post-sec.
43-4051	Customer Service Representatives	2,495	2,715	220	8.8%	220	820	1,040	Moderate OJT	Work Exp.
43-4061	Eligibility Interviewers, Government Programs	239	264	25	10.5%	25	58	83	Moderate OJT	Post-sec.
43-4071	File Clerks	257	301	44	17.1%	44	68	112	Short OJT	Work Exp.
43-4081	Hotel, Motel, and Resort Desk Clerks	170	227	57	33.5%	57	67	124	Short OJT	Work Exp.
43-4111	Interviewers, Except Eligibility and Loan	315	393	78	24.8%	78	84	162	Short OJT	Work Exp.
43-4121	Library Assistants, Clerical	181	195	14	7.7%	14	78	92	Short OJT	Post-sec.
43-4131	Loan Interviewers and Clerks	244	260	16	6.6%	16	62	78	Short OJT	Work Exp.
43-4141	New Accounts Clerks	112	119	7	6.3%	7	33	40	Work Exp.	Bachelor's
43-4151	Order Clerks	282	303	21	7.4%	21	83	104	Short OJT	Work Exp.
43-4161	Human Resources Assistants, Except Payroll and Timekeeping	209	230	21	10.0%	21	62	83	Short OJT	Post-sec.
43-4171	Receptionists and Information Clerks	1,722	1,999	277	16.1%	277	502	779	Short OJT	Work Exp.
43-4181	Reservation and Transportation Ticket Agents and Travel Clerks	17	18	1	5.9%	1	4	5	Short OJT	Post-sec.
43-4199	Information and Record Clerks, All Other	460	501	41	8.9%	41	136	177	Short OJT	Work Exp.
43-5000	Material Recording, Scheduling, Dispatching, and Distributing Workers	3,831	4,072	241	6.3%	277	945	1,222		
43-5011	Cargo and Freight Agents	18	20	2	11.1%	2	4	6	Moderate OJT	Work Exp.
43-5021	Couriers and Messengers	78	93	15	19.2%	15	20	35	Short OJT	Work Exp.
43-5031	Police, Fire, and Ambulance Dispatchers	122	136	14	11.5%	14	27	41	Moderate OJT	Work Exp.
43-5032	Dispatchers, Except Police, Fire, and Ambulance	193	209	16	8.3%	16	41	57	Moderate OJT	Work Exp.
43-5041	Meter Readers, Utilities	41	41	0	0.0%	0	11	11	Short OJT	Work Exp.
43-5051	Postal Service Clerks	114	108	-6	-5.3%	0	24	24	Short OJT	Post-sec.
43-5052	Postal Service Mail Carriers	441	420	-21	-4.8%	0	134	134	Short OJT	Work Exp.
43-5053	Postal Service Mail Sorters, Processors, and Processing Machine Operators	179	170	-9	-5.0%	0	16	16	Short OJT	Work Exp.
43-5061	Production, Planning, and Expediting Clerks	295	312	17	5.8%	17	75	92	Work Exp.	Bachelor's
43-5071	Shipping, Receiving, and Traffic Clerks	772	820	48	6.2%	48	197	245	Short OJT	Work Exp.
43-5081	Stock Clerks and Order Fillers	1,471	1,627	156	10.6%	156	357	513	Short OJT	Work Exp.
43-5111	Weighers, Measurers, Checkers, and Samplers, Recordkeeping	107	116	9	8.4%	9	39	48	Short OJT	Work Exp.
43-6000	Secretaries and Administrative Assistants	5,415	6,089	674	12.4%	674	775	1,449		
43-6011	Executive Secretaries and Administrative Assistants	1,659	1,816	157	9.5%	157	234	391	Moderate OJT	Assoc.
43-6012	Legal Secretaries	412	462	50	12.1%	50	59	109	Post-sec.	Assoc.

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	2018	Change	Percent Change	2008-2018 Openings Due to Growth	Due to Replacement	Total	Minimum Education	Competitive Education
43-6013	Medical Secretaries	838	1,102	264	31.5%	264	131	395	Moderate OJT	Post-sec.
43-6014	Secretaries, Except Legal, Medical, and Executive	2,506	2,709	203	8.1%	203	351	554	Moderate OJT	Assoc.
43-9000	Other Office and Administrative Support Workers	7,582	8,173	591	7.8%	593	1,258	1,851		
43-9011	Computer Operators	53	56	3	5.7%	3	6	9	Moderate OJT	Post-sec.
43-9021	Data Entry Keyers	321	347	26	8.1%	26	70	96	Moderate OJT	Work Exp.
43-9022	Word Processors and Typists	75	84	9	12.0%	9	6	15	Moderate OJT	Post-sec.
43-9031	Desktop Publishers	77	79	2	2.6%	2	13	15	Post-sec.	Post-sec. + Work Exp.
43-9041	Insurance Claims and Policy Processing Clerks	387	415	28	7.2%	28	52	80	Moderate OJT	Post-sec.
43-9051	Mail Clerks and Mail Machine Operators, Except Postal Service	160	175	15	9.4%	15	30	45	Short OJT	Post-sec.
43-9061	Office Clerks, General	4,905	5,312	407	8.3%	407	696	1,103	Short OJT	Post-sec.
43-9071	Office Machine Operators, Except Computer	74	77	3	4.1%	3	25	28	Short OJT	Work Exp.
43-9081	Proofreaders and Copy Markers	12	10	-2	-16.7%	0	2	2	Short OJT	Work Exp.
43-9111	Statistical Assistants	32	32	0	0.0%	0	5	5	Moderate OJT	Post-sec.
43-9199	Office and Administrative Support Workers, All Other	1,486	1,586	100	6.7%	100	353	453	Short OJT	Work Exp.
	Farming, Fishing, and Forestry	11,178	11,923	745	6.7%	770	3,056	3,826		
45-0000	Farming, Fishing, and Forestry Occupations	11,178	11,923	745	6.7%	770	3,056	3,826		
45-1000	Supervisors, Farming, Fishing, and Forestry Workers	622	651	29	4.7%	29	164	193		
45-1011	Supervisors and Managers of Farming, Fishing, and Forestry Workers	578	603	25	4.3%	25	152	177	Work Exp.	Work Exp.
45-1012	Farm Labor Contractors	44	48	4	9.1%	4	12	16	Work Exp.	Work Exp.
45-2000	Agricultural Workers	10,104	10,841	737	7.3%	737	2,774	3,511		
45-2011	Agricultural Inspectors	12	12	0	0.0%	0	2	2	Moderate OJT	Work Exp.
45-2021	Animal Breeders	3	4	1	33.3%	1	1	2	Moderate OJT	Work Exp.
45-2041	Graders and Sorters, Agricultural Products	744	787	43	5.8%	43	157	200	Short OJT	Work Exp.
45-2091	Agricultural Equipment Operators	795	838	43	5.4%	43	220	263	Short OJT	Work Exp.
45-2092	Farmworkers and Laborers for Crops, Nurseries, and Greenhouses	7,706	8,293	587	7.6%	587	2,157	2,744	Short OJT	Work Exp.
45-2093	Farmworkers, Farm and Ranch Animals	617	670	53	8.6%	53	174	227	Short OJT	Work Exp.
45-2099	Agricultural Workers, All Other	227	237	10	4.4%	10	63	73	Short OJT	Work Exp.
45-3000	Fishing and Hunting Workers	3	3	0	0.0%	0	1	1		
45-3011	Fishers and Related Fishing Workers	3	3	0	0.0%	0	1	1	Short OJT	Work Exp.
45-4000	Forest, Conservation, and Logging Workers	449	428	-21	-4.7%	4	117	121		
45-4011	Forest and Conservation Workers	25	27	2	8.0%	2	7	9	Moderate OJT	Work Exp.
45-4021	Fallers and Buckers	90	84	-6	-6.7%	0	23	23	Moderate OJT	Work Exp.
45-4022	Logging Equipment Operators	149	139	-10	-6.7%	0	39	39	Moderate OJT	Work Exp.
45-4023	Log Graders and Scalers	41	43	2	4.9%	2	11	13	Moderate OJT	Work Exp.
45-4029	Logging Workers, All Other	144	135	-9	-6.3%	0	37	37	Moderate OJT	Work Exp.
	Construction and Extraction	9,054	9,197	143	1.6%	145	1,566	1,711		
47-0000	Construction and Extraction Occupations	9,054	9,197	143	1.6%	145	1,566	1,711		
47-1000	Supervisors, Construction and Extraction Workers	731	744	13	1.8%	13	143	156		
47-1011	Supervisors and Managers of Construction Trades and Extraction Workers	731	744	13	1.8%	13	143	156	Work Exp.	Post-sec.
47-2000	Construction Trades Workers	7,332	7,412	80	1.1%	81	1,192	1,273		
47-2011	Boilermakers	1	1	0	0.0%	0	0	0	Long OJT	Post-sec.
47-2021	Brickmasons and Blockmasons	169	169	0	0.0%	0	43	43	Long OJT	Post-sec.

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	Employment 2018	Employment Change	Employment Percent Change	2008-2018 Openings Due to Growth	2008-2018 Openings Due to Replacement	2008-2018 Openings Total	Minimum Education	Competitive Education
47-2022	Stonemasons	1	1	0	0.0%	0	0	0	Long OJT	Post-sec.
47-2031	Carpenters	1,679	1,693	14	0.8%	14	210	224	Long OJT	Post-sec.
47-2041	Carpet Installers	38	42	4	10.5%	4	10	14	Moderate OJT	Work Exp.
47-2043	Floor Sanders and Finishers	6	6	0	0.0%	0	2	2	Moderate OJT	Work Exp.
47-2044	Tile and Marble Setters	56	58	2	3.6%	2	15	17	Long OJT	Work Exp.
47-2051	Cement Masons and Concrete Finishers	380	382	2	0.5%	2	96	98	Long OJT	Work Exp.
47-2061	Construction Laborers	1,408	1,423	15	1.1%	15	95	110	Short OJT	Work Exp.
47-2071	Paving, Surfacing, and Tamping Equipment Operators	93	94	1	1.1%	1	15	16	Moderate OJT	Work Exp.
47-2072	Pile-Driver Operators	13	13	0	0.0%	0	2	2	Moderate OJT	Post-sec.
47-2073	Operating Engineers and Other Construction Equipment Operators	352	356	4	1.1%	4	61	65	Moderate OJT	Work Exp.
47-2081	Drywall and Ceiling Tile Installers	252	252	0	0.0%	0	28	28	Long OJT	Work Exp.
47-2082	Tapers	182	181	-1	-0.5%	0	20	20	Moderate OJT	Work Exp.
47-2111	Electricians	924	928	4	0.4%	4	224	228	Post-sec.	Post-sec. + Work Exp.
47-2121	Glaziers	123	130	7	5.7%	7	46	53	Long OJT	Post-sec.
47-2131	Insulation Workers, Floor, Ceiling, and Wall	69	69	0	0.0%	0	23	23	Long OJT	Work Exp.
47-2141	Painters, Construction and Maintenance	524	534	10	1.9%	10	90	100	Long OJT	Work Exp.
47-2151	Pipelayers	67	69	2	3.0%	2	14	16	Moderate OJT	Work Exp.
47-2152	Plumbers, Pipefitters, and Steamfitter	482	489	7	1.5%	7	98	105	Post-sec.	Post-sec. + Work Exp.
47-2161	Plasterers and Stucco Masons	21	21	0	0.0%	0	3	3	Long OJT	Work Exp.
47-2171	Reinforcing Iron and Rebar Workers	16	16	0	0.0%	0	3	3	Long OJT	Work Exp.
47-2181	Roofers	255	255	0	0.0%	0	42	42	Moderate OJT	Work Exp.
47-2211	Sheet Metal Workers	206	215	9	4.4%	9	50	59	Post-sec.	Post-sec. + Work Exp.
47-2221	Structural Iron and Steel Workers	15	15	0	0.0%	0	2	2	Work Exp.	Post-sec.
47-3000	Helpers, Construction Trades	353	359	6	1.7%	6	74	80		
47-3011	Brickmason's, Blockmason's, Stonemason's, and Tile and Marble Setter's Helpers	132	133	1	0.8%	1	28	29	Short OJT	Work Exp.
47-3012	Carpenter's Helpers	62	64	2	3.2%	2	13	15	Short OJT	Work Exp.
47-3013	Electrician's Helpers	46	46	0	0.0%	0	10	10	Short OJT	Work Exp.
47-3014	Painter's, Paperhanger's, Plasterer's, and Stucco Mason's Helpers	29	29	0	0.0%	0	6	6	Short OJT	Work Exp.
47-3015	Pipelayer's, Plumber's, Pipefitter's, and Steamfitter's Helpers	43	44	1	2.3%	1	9	10	Short OJT	Work Exp.
47-3016	Roofer's Helpers	2	2	0	0.0%	0	0	0	Short OJT	Work Exp.
47-3019	Construction Trades' Helpers, All Other	39	41	2	5.1%	2	8	10	Short OJT	Work Exp.
47-4000	Other Construction and Related Workers	584	629	45	7.7%	45	148	193		
47-4011	Construction and Building Inspectors	137	152	15	10.9%	15	30	45	Work Exp.	Assoc.
47-4031	Fence Erectors	81	83	2	2.5%	2	9	11	Moderate OJT	Work Exp.
47-4041	Hazardous Materials Removal Workers	3	4	1	33.3%	1	1	2	Moderate OJT	Work Exp.
47-4051	Highway Maintenance Workers	236	256	20	8.5%	20	67	87	Moderate OJT	Work Exp.
47-4061	Rail-Track Laying and Maintenance Equipment Operators	1	1	0	0.0%	0	0	0	Moderate OJT	Work Exp.
47-4071	Septic Tank Servicers and Sewer Pipe Cleaners	36	39	3	8.3%	3	10	13	Moderate OJT	Work Exp.
47-4099	Construction and Related Workers, All Other	90	94	4	4.4%	4	31	35	Moderate OJT	Work Exp.
47-5000	Extraction Workers	54	53	-1	-1.9%	0	9	9		
47-5021	Earth Drillers, Water and Construction	40	39	-1	-2.5%	0	7	7	Moderate OJT	Work Exp.

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	Employment 2018	Employment Change	Employment Percent Change	2008-2018 Openings Due to Growth	2008-2018 Openings Due to Replacement	2008-2018 Openings Total	Minimum Education	Competitive Education
47-5031	Blasters, Explosives Workers, and Ordnance Handling Experts	8	8	0	0.0%	0	1	1	Moderate OJT	Work Exp.
47-5081	Extraction Worker's Helpers	6	6	0	0.0%	0	1	1	Short OJT	Work Exp.
	Installation, Maintenance, and Repair	6,453	6,816	363	5.6%	388	1,300	1,688		
49-0000	Installation, Maintenance, and Repair Occupations	6,453	6,816	363	5.6%	388	1,300	1,688		
49-1000	Supervisors, Installation, Maintenance, and Repair Workers	529	553	24	4.5%	24	142	166		
49-1011	Supervisors and Managers of Mechanics, Installers, and Repairers	529	553	24	4.5%	24	142	166	Work Exp.	Post-sec.
49-2000	Electrical and Electronic Equipment Mechanics, Installers, and Repairers	528	550	22	4.2%	26	98	124		
49-2011	Computer, Automated Teller, and Office Machine Repairers	107	119	12	11.2%	12	19	31	Work Exp.	Post-sec.
49-2021	Radio Mechanics	20	22	2	10.0%	2	4	6	Post-sec.	Post-sec. + Work Exp.
49-2022	Telecommunications Equipment Installers and Repairers, Except Line Installers	200	196	-4	-2.0%	0	35	35	Post-sec.	Post-sec. + Work Exp.
49-2091	Avionics Technicians	23	23	0	0.0%	0	4	4	Post-sec.	Assoc.
49-2092	Electric Motor, Power Tool, and Related Repairers	24	28	4	16.7%	4	9	13	Long OJT	Post-sec.
49-2094	Electrical and Electronics Repairers, Commercial and Industrial Equipment	46	46	0	0.0%	0	8	8	Post-sec.	Assoc.
49-2095	Electrical and Electronics Repairers, Powerhouse, Substation, and Relay	17	19	2	11.8%	2	3	5	Post-sec.	Post-sec. + Work Exp.
49-2096	Electronic Equipment Installers and Repairers, Motor Vehicles	50	55	5	10.0%	5	9	14	Post-sec.	Post-sec. + Work Exp.
49-2097	Electronic Home Entertainment Equipment Installers and Repairers	7	7	0	0.0%	0	1	1	Moderate OJT	Post-sec.
49-2098	Security and Fire Alarm Systems Installers	34	35	1	2.9%	1	6	7	Post-sec.	Post-sec. + Work Exp.
49-3000	Vehicle and Mobile Equipment Mechanics, Installers, and Repairers	2,079	2,224	145	7.0%	147	443	590		
49-3011	Aircraft Mechanics and Service Technicians	159	162	3	1.9%	3	31	34	Post-sec.	Assoc.
49-3021	Automotive Body and Related Repairers	168	187	19	11.3%	19	46	65	Long OJT	Post-sec.
49-3022	Automotive Glass Installers and Repairers	19	21	2	10.5%	2	4	6	Moderate OJT	Post-sec.
49-3023	Automotive Service Technicians and Mechanics	586	636	50	8.5%	50	117	167	Post-sec.	Assoc.
49-3031	Bus and Truck Mechanics and Diesel Engine Specialists	320	347	27	8.4%	27	77	104	Long OJT	Post-sec.
49-3041	Farm Equipment Mechanics	295	318	23	7.8%	23	58	81	Long OJT	Post-sec.
49-3042	Mobile Heavy Equipment Mechanics, Except Engines	153	157	4	2.6%	4	30	34	Long OJT	Post-sec.
49-3043	Rail Car Repairers	13	13	0	0.0%	0	2	2	Long OJT	Work Exp.
49-3051	Motorboat Mechanics	8	8	0	0.0%	0	2	2	Long OJT	Work Exp.
49-3052	Motorcycle Mechanics	26	25	-1	-3.8%	0	5	5	Long OJT	Post-sec.
49-3053	Outdoor Power Equipment and Other Small Engine Mechanics	29	34	5	17.2%	5	7	12	Moderate OJT	Post-sec.
49-3091	Bicycle Repairers	30	30	0	0.0%	0	6	6	Moderate OJT	Work Exp.
49-3092	Recreational Vehicle Service Technicians	43	42	-1	-2.3%	0	9	9	Post-sec.	Assoc.
49-3093	Tire Repairers and Changers	230	244	14	6.1%	14	49	63	Short OJT	Work Exp.
49-9000	Other Installation, Maintenance, and Repair Occupations	3,317	3,489	172	5.2%	191	617	808		
49-9011	Mechanical Door Repairers	16	16	0	0.0%	0	2	2	Moderate OJT	Work Exp.

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	Employment 2018	Employment Change	Employment Percent Change	2008-2018 Openings Due to Growth	2008-2018 Openings Due to Replacement	2008-2018 Openings Total	Minimum Education	Competitive Education
49-9012	Control and Valve Installers and Repairers, Except Mechanical Door	31	33	2	6.5%	2	5	7	Moderate OJT	Work Exp.
49-9021	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	348	361	13	3.7%	13	57	70	Long OJT	Post-sec.
49-9031	Home Appliance Repairers	63	70	7	11.1%	7	10	17	Long OJT	Post-sec.
49-9041	Industrial Machinery Mechanics	255	242	-13	-5.1%	0	36	36	Long OJT	Post-sec.
49-9042	Maintenance and Repair Workers, General	1,321	1,450	129	9.8%	129	213	342	Long OJT	Assoc.
49-9043	Maintenance Workers, Machinery	71	71	0	0.0%	0	11	11	Long OJT	Assoc.
49-9044	Millwrights	56	56	0	0.0%	0	11	11	Post-sec.	Post-sec. + Work Exp.
49-9045	Refractory Materials Repairers, except Brickmasons	2	2	0	0.0%	0	0	0	Moderate OJT	Work Exp.
49-9051	Electrical Power-Line Installers and Repairers	123	125	2	1.6%	2	44	46	Post-sec.	Post-sec. + Work Exp.
49-9052	Telecommunications Line Installers and Repairers	197	193	-4	-2.0%	0	30	30	Long OJT	Assoc.
49-9061	Camera and Photographic Equipment Repairers	2	3	1	50.0%	1	1	2	Moderate OJT	Work Exp.
49-9062	Medical Equipment Repairers	40	46	6	15.0%	6	12	18	Post-sec.	Assoc.
49-9064	Watch Repairers	3	3	0	0.0%	0	1	1	Long OJT	Post-sec.
49-9069	Precision Instrument and Equipment Repairers, All Other	24	25	1	4.2%	1	7	8	Long OJT	Post-sec.
49-9091	Coin, Vending, and Amusement Machine Servicers and Repairers	91	96	5	5.5%	5	31	36	Moderate OJT	Work Exp.
49-9094	Locksmiths and Safe Repairers	15	16	1	6.7%	1	2	3	Moderate OJT	Post-sec.
49-9095	Manufactured Building and Mobile Home Installers	16	17	1	6.3%	1	1	2	Moderate OJT	Work Exp.
49-9096	Riggers	17	15	-2	-11.8%	0	2	2	Moderate OJT	Work Exp.
49-9097	Signal and Track Switch Repairers	8	8	0	0.0%	0	1	1	Post-sec.	Post-sec. + Work Exp.
49-9098	Installation, Maintenance, and Repair Worker's Helpers	127	140	13	10.2%	13	64	77	Short OJT	Work Exp.
49-9099	Installation, Maintenance, and Repair Workers, All Other	491	501	10	2.0%	10	76	86	Long OJT	Post-sec.
	Production	13,276	13,603	327	2.5%	508	2,623	3,131		
51-0000	Production Occupations	13,276	13,603	327	2.5%	508	2,623	3,131		
51-1000	Supervisors, Production Workers	1,067	1,089	22	2.1%	22	145	167		
51-1011	Supervisors and Managers of Production and Operating Workers	1,067	1,089	22	2.1%	22	145	167	Work Exp.	Bachelor's
51-2000	Assemblers and Fabricators	2,454	2,522	68	2.8%	68	529	597		
51-2011	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	1	2	1	100.0%	1	0	1	Long OJT	Work Exp.
51-2021	Coil Winders, Tapers, and Finishers	4	4	0	0.0%	0	1	1	Short OJT	Work Exp.
51-2022	Electrical and Electronic Equipment Assemblers	364	370	6	1.6%	6	57	63	Short OJT	Work Exp.
51-2023	Electromechanical Equipment Assemblers	31	34	3	9.7%	3	5	8	Short OJT	Work Exp.
51-2031	Engine and Other Machine Assemblers	17	20	3	17.6%	3	4	7	Moderate OJT	Post-sec.
51-2041	Structural Metal Fabricators and Fitters	194	204	10	5.2%	10	42	52	Long OJT	Post-sec.
51-2091	Fiberglass Laminators and Fabricators	53	55	2	3.8%	2	12	14	Moderate OJT	Work Exp.
51-2092	Assemblers, Multi-task or Team	1,394	1,422	28	2.0%	28	317	345	Moderate OJT	Work Exp.
51-2099	Assemblers and Fabricators, All Other	396	411	15	3.8%	15	91	106	Moderate OJT	Work Exp.
51-3000	Food Processing Workers	797	875	78	9.8%	78	234	312		
51-3011	Bakers	250	280	30	12.0%	30	68	98	Long OJT	Work Exp.
51-3021	Butchers and Meat Cutters	160	180	20	12.5%	20	54	74	Long OJT	Post-sec.
51-3022	Meat, Poultry, and Fish Cutters and Trimmers	44	49	5	11.4%	5	15	20	Short OJT	Work Exp.
51-3023	Slaughterers and Meat Packers	30	32	2	6.7%	2	10	12	Moderate OJT	Work Exp.

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	Employment 2018	Employment Change	Employment Percent Change	2008-2018 Openings Due to Growth	2008-2018 Openings Due to Replacement	2008-2018 Openings Total	Minimum Education	Competitive Education
51-3091	Food Roasting, Baking, and Drying Machine Operators and Tenders	28	31	3	10.7%	3	8	11	Short OJT	Work Exp.
51-3092	Food Mixing and Blending Machine Operators and Tenders	103	109	6	5.8%	6	25	31	Short OJT	Work Exp.
51-3093	Food Cooking Machine Operators and Tenders	182	194	12	6.6%	12	54	66	Short OJT	Work Exp.
51-4000	Metal Workers and Plastic Workers	1,768	1,796	28	1.6%	77	388	465		
51-4011	Computer-Controlled Machine Tool Operators, Metal and Plastic	220	227	7	3.2%	7	44	51	Long OJT	Post-sec.
51-4012	Numerical Tool and Process Control Programmers	31	33	2	6.5%	2	6	8	Post-sec.	Post-sec. + Work Exp.
51-4021	Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic	71	57	-14	-19.7%	0	13	13	Moderate OJT	Work Exp.
51-4022	Forging Machine Setters, Operators, and Tenders, Metal and Plastic	4	4	0	0.0%	0	1	1	Moderate OJT	Work Exp.
51-4023	Rolling Machine Setters, Operators, and Tenders, Metal and Plastic	47	42	-5	-10.6%	0	9	9	Moderate OJT	Work Exp.
51-4031	Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	228	233	5	2.2%	5	46	51	Moderate OJT	Work Exp.
51-4032	Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic	16	18	2	12.5%	2	1	3	Moderate OJT	Work Exp.
51-4033	Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic	25	24	-1	-4.0%	0	4	4	Moderate OJT	Work Exp.
51-4034	Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic	24	23	-1	-4.2%	0	4	4	Moderate OJT	Work Exp.
51-4035	Milling and Planing Machine Setters, Operators, and Tenders, Metal and Plastic	8	9	1	12.5%	1	2	3	Moderate OJT	Work Exp.
51-4041	Machinists	331	348	17	5.1%	17	45	62	Long OJT	Post-sec.
51-4051	Metal-Refining Furnace Operators and Tenders	24	21	-3	-12.5%	0	4	4	Moderate OJT	Work Exp.
51-4052	Pourers and Casters, Metal	20	12	-8	-40.0%	0	3	3	Moderate OJT	Work Exp.
51-4061	Model Makers, Metal and Plastic	6	6	0	0.0%	0	0	0	Long OJT	Work Exp.
51-4071	Foundry Mold Makers and Coremakers	4	2	-2	-50.0%	0	1	1	Moderate OJT	Work Exp.
51-4072	Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	51	40	-11	-21.6%	0	9	9	Moderate OJT	Work Exp.
51-4081	Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	45	47	2	4.4%	2	9	11	Moderate OJT	Post-sec.
51-4111	Tool and Die Makers	28	27	-1	-3.6%	0	2	2	Long OJT	Post-sec.
51-4121	Welders, Cutters, Solderers, and Brazers	492	531	39	7.9%	39	157	196	Long OJT	Post-sec.
51-4122	Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	22	23	1	4.5%	1	7	8	Moderate OJT	Post-sec.
51-4191	Heat Treating Equipment Setters, Operators, and Tenders, Metal and Plastic	17	15	-2	-11.8%	0	7	7	Moderate OJT	Work Exp.
51-4192	Lay-Out Workers, Metal and Plastic	5	5	0	0.0%	0	1	1	Long OJT	Work Exp.
51-4193	Plating and Coating Machine Setters, Operators, and Tenders, Metal and Plastic	17	18	1	5.9%	1	5	6	Moderate OJT	Work Exp.
51-4194	Tool Grinders, Filers, and Sharpeners	22	21	-1	-4.5%	0	7	7	Long OJT	Work Exp.
51-4199	Metal Workers and Plastic Workers, All Other	10	10	0	0.0%	0	1	1	Moderate OJT	Post-sec.
51-5000	Printing Workers	348	295	-53	-15.2%	0	50	50		

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	2018	Change	Percent Change	2008-2018 Openings Due to Growth	Due to Replacement	Total	Minimum Education	Competitive Education
51-5011	Bindery Workers	83	66	-17	-20.5%	0	11	11	Moderate OJT	Work Exp.
51-5012	Bookbinders	9	7	-2	-22.2%	0	1	1	Moderate OJT	Work Exp.
51-5021	Job Printers	40	35	-5	-12.5%	0	1	1	Long OJT	Work Exp.
51-5022	Prepress Technicians and Workers	74	62	-12	-16.2%	0	9	9	Long OJT	Post-sec.
51-5023	Printing Press Machine Operators	142	125	-17	-12.0%	0	28	28	Moderate OJT	Work Exp.
51-6000	Textile, Apparel, and Furnishings Workers	610	645	35	5.7%	36	55	91		
51-6011	Laundry and Dry-Cleaning Workers	126	146	20	15.9%	20	24	44	Moderate OJT	Work Exp.
51-6021	Pressers, Textile, Garment, and Related Materials	32	34	2	6.3%	2	1	3	Short OJT	Work Exp.
51-6031	Sewing Machine Operators	326	334	8	2.5%	8	18	26	Moderate OJT	Work Exp.
51-6041	Shoe and Leather Workers and Repairers	22	25	3	13.6%	3	3	6	Long OJT	Work Exp.
51-6051	Sewers, Hand	2	2	0	0.0%	0	0	0	Short OJT	Work Exp.
51-6052	Tailors, Dressmakers, and Custom Sewers	19	20	1	5.3%	1	2	3	Work Exp.	Post-sec.
51-6062	Textile Cutting Machine Setters, Operators, and Tenders	14	14	0	0.0%	0	2	2	Moderate OJT	Work Exp.
51-6092	Fabric and Apparel Patternmakers	4	4	0	0.0%	0	0	0	Long OJT	Work Exp.
51-6093	Upholsterers	56	58	2	3.6%	2	4	6	Long OJT	Work Exp.
51-6099	Textile, Apparel, and Furnishings Workers, All Other	9	8	-1	-11.1%	0	1	1	Moderate OJT	Work Exp.
51-7000	Woodworkers	745	718	-27	-3.6%	6	153	159		
51-7011	Cabinetmakers and Bench Carpenters	286	282	-4	-1.4%	0	64	64	Long OJT	Work Exp.
51-7021	Furniture Finishers	7	8	1	14.3%	1	2	3	Long OJT	Work Exp.
51-7032	Patternmakers, Wood	1	1	0	0.0%	0	0	0	Long OJT	Work Exp.
51-7041	Sawing Machine Setters, Operators, and Tenders, Wood	160	141	-19	-11.9%	0	27	27	Moderate OJT	Work Exp.
51-7042	Woodworking Machine Setters, Operators, and Tenders, Except Sawing	228	218	-10	-4.4%	0	45	45	Moderate OJT	Work Exp.
51-7099	Woodworkers, All Other	63	68	5	7.9%	5	15	20	Moderate OJT	Work Exp.
51-8000	Plant and System Operators	231	238	7	3.0%	15	54	69		
51-8012	Power Distributors and Dispatchers	13	13	0	0.0%	0	5	5	Long OJT	Bachelor's
51-8013	Power Plant Operators	7	8	1	14.3%	1	3	4	Long OJT	Bachelor's
51-8021	Stationary Engineers and Boiler Operators	28	27	-1	-3.6%	0	5	5	Long OJT	Work Exp.
51-8031	Water and Liquid Waste Treatment Plant and System Operators	128	141	13	10.2%	13	29	42	Post-sec.	Post-sec. + Work Exp.
51-8091	Chemical Plant and System Operators	33	26	-7	-21.2%	0	7	7	Long OJT	Post-sec.
51-8093	Petroleum Pump System Operators, Refinery Operators, and Gaugers	2	2	0	0.0%	0	0	0	Long OJT	Post-sec.
51-8099	Plant and System Operators, All Other	20	21	1	5.0%	1	5	6	Long OJT	Post-sec.
51-9000	Other Production Occupations	5,256	5,425	169	3.2%	206	1,015	1,221		
51-9011	Chemical Equipment Operators and Tenders	36	36	0	0.0%	0	3	3	Moderate OJT	Work Exp.
51-9012	Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	219	239	20	9.1%	20	19	39	Moderate OJT	Work Exp.
51-9021	Crushing, Grinding, and Polishing Machine Setters, Operators, and Tenders	63	58	-5	-7.9%	0	10	10	Moderate OJT	Work Exp.
51-9022	Grinding and Polishing Workers, Hand	122	121	-1	-0.8%	0	21	21	Moderate OJT	Work Exp.
51-9023	Mixing and Blending Machine Setters, Operators, and Tenders	177	189	12	6.8%	12	31	43	Moderate OJT	Work Exp.
51-9031	Cutters and Trimmers, Hand	59	50	-9	-15.3%	0	12	12	Short OJT	Work Exp.
51-9032	Cutting and Slicing Machine Setters, Operators, and Tenders	105	103	-2	-1.9%	0	22	22	Moderate OJT	Work Exp.

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	Employment 2018	Employment Change	Employment Percent Change	2008-2018 Openings Due to Growth	2008-2018 Openings Due to Replacement	2008-2018 Openings Total	Minimum Education	Competitive Education
51-9041	Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	283	286	3	1.1%	3	59	62	Moderate OJT	Work Exp.
51-9051	Furnace, Kiln, Oven, Drier, and Kettle Operators and Tenders	17	15	-2	-11.8%	0	2	2	Moderate OJT	Work Exp.
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	588	591	3	0.5%	3	99	102	Moderate OJT	Post-sec.
51-9071	Jewelers and Precious Stone and Metal Workers	25	26	1	4.0%	1	5	6	Post-sec.	Post-sec. + Work Exp.
51-9081	Dental Laboratory Technicians	68	77	9	13.2%	9	14	23	Long OJT	Post-sec.
51-9082	Medical Appliance Technicians	17	18	1	5.9%	1	3	4	Long OJT	Post-sec.
51-9083	Ophthalmic Laboratory Technicians	21	25	4	19.0%	4	4	8	Moderate OJT	Work Exp.
51-9111	Packaging and Filling Machine Operators and Tenders	1,121	1,183	62	5.5%	62	193	255	Short OJT	Work Exp.
51-9121	Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	157	157	0	0.0%	0	41	41	Moderate OJT	Work Exp.
51-9122	Painters, Transportation Equipment	54	60	6	11.1%	6	15	21	Moderate OJT	Work Exp.
51-9123	Painting, Coating, and Decorating Workers	49	55	6	12.2%	6	14	20	Long OJT	Post-sec.
51-9131	Photographic Process Workers	27	29	2	7.4%	2	7	9	Moderate OJT	Post-sec.
51-9132	Photographic Processing Machine Operators	73	83	10	13.7%	10	19	29	Short OJT	Work Exp.
51-9141	Semiconductor Processors	1	1	0	0.0%	0	0	0	Work Exp.	Work Exp.
51-9191	Cementing and Gluing Machine Operators and Tenders	22	20	-2	-9.1%	0	5	5	Moderate OJT	Work Exp.
51-9192	Cleaning, Washing, and Pickling Equipment Operators and Tenders	158	164	6	3.8%	6	33	39	Moderate OJT	Work Exp.
51-9193	Cooling and Freezing Equipment Operators and Tenders	20	21	1	5.0%	1	4	5	Moderate OJT	Work Exp.
51-9194	Etchers and Engravers	5	7	2	40.0%	2	0	2	Long OJT	Post-sec.
51-9195	Molders, Shapers, and Casters, Except Metal and Plastic	61	61	0	0.0%	0	30	30	Moderate OJT	Work Exp.
51-9196	Paper Goods Machine Setters, Operators, and Tenders	77	61	-16	-20.8%	0	14	14	Moderate OJT	Work Exp.
51-9197	Tire Builders	11	11	0	0.0%	0	4	4	Moderate OJT	Work Exp.
51-9198	Production Worker's Helpers	881	910	29	3.3%	29	157	186	Short OJT	Work Exp.
51-9199	Production Workers, All Other	739	768	29	3.9%	29	175	204	Moderate OJT	Work Exp.
	Transportation and Material Moving	13,774	14,671	897	6.5%	908	3,448	4,356		
53-0000	Transportation and Material Moving Occupations	13,774	14,671	897	6.5%	908	3,448	4,356		
53-1000	Supervisors, Transportation and Material Moving Workers	440	474	34	7.7%	34	79	113		
53-1021	Supervisors and Managers of Transportation Helpers, Laborers, and Material Movers, Hand	151	166	15	9.9%	15	27	42	Work Exp.	Assoc.
53-1031	Supervisors and Managers of Transportation and Material-Moving Machine and Vehicle Operators	289	308	19	6.6%	19	52	71	Work Exp.	Bachelor's
53-2000	Air Transportation Workers	223	226	3	1.3%	3	75	78		
53-2011	Airline Pilots, Copilots, and Flight Engineers	24	26	2	8.3%	2	8	10	Post-sec.	Assoc.
53-2012	Commercial Pilots, Exclude Airline Pilots	181	181	0	0.0%	0	61	61	Post-sec.	Post-sec. + Work Exp.
53-2022	Airfield Operations Specialists	18	19	1	5.6%	1	6	7	Long OJT	Work Exp.
53-3000	Motor Vehicle Operators	5,070	5,427	357	7.0%	357	932	1,289		
53-3011	Ambulance Drivers and Attendants, Except Emergency Medical Technicians	7	8	1	14.3%	1	1	2	Moderate OJT	Work Exp.
53-3021	Bus Drivers, Transit and Intercity	292	327	35	12.0%	35	54	89	Moderate OJT	Work Exp.
53-3022	Bus Drivers, School	781	833	52	6.7%	52	141	193	Short OJT	Work Exp.
53-3031	Driver/Sales Workers	503	553	50	9.9%	50	94	144	Short OJT	Work Exp.
53-3032	Truck Drivers, Heavy and Tractor-Trailer	2,309	2,433	124	5.4%	124	424	548	Post-sec.	Post-sec. + Work Exp.
53-3033	Truck Drivers, Light or Delivery Services	731	788	57	7.8%	57	136	193	Moderate OJT	Work Exp.

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

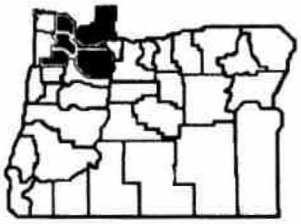
Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	2018	Change	Percent Change	2008-2018 Openings Due to Growth	Due to Replacement	Total	Minimum Education	Competitive Education
53-3041	Taxi Drivers and Chauffeurs	358	388	30	8.4%	30	66	96	Short OJT	Work Exp.
53-3099	Motor Vehicle Operators, All Other	89	97	8	9.0%	8	16	24	Short OJT	Work Exp.
53-4000	Rail Transportation Workers	71	69	-2	-2.8%	0	23	23		
53-4011	Locomotive Engineers	8	8	0	0.0%	0	3	3	Moderate OJT	Work Exp.
53-4013	Rail Yard Engineers, Dinkey Operators, and Hostlers	1	1	0	0.0%	0	0	0	Moderate OJT	Work Exp.
53-4021	Railroad Brake, Signal, and Switch Operators	11	9	-2	-18.2%	0	3	3	Moderate OJT	Work Exp.
53-4031	Railroad Conductors and Yardmasters	50	50	0	0.0%	0	17	17	Moderate OJT	Work Exp.
53-4099	Rail Transportation Workers, All Other	1	1	0	0.0%	0	0	0	Moderate OJT	Work Exp.
53-5000	Water Transportation Workers	9	10	1	11.1%	1	4	5		
53-5021	Captains, Mates, and Pilots of Water Vessels	7	8	1	14.3%	1	3	4	Post-sec.	Post-sec. + Work Exp.
53-5022	Motorboat Operators	2	2	0	0.0%	0	1	1	Moderate OJT	Work Exp.
53-6000	Other Transportation Workers	919	1,026	107	11.6%	107	392	499		
53-6021	Parking Lot Attendants	71	78	7	9.9%	7	27	34	Short OJT	Work Exp.
53-6031	Service Station Attendants	795	893	98	12.3%	98	351	449	Short OJT	Work Exp.
53-6041	Traffic Technicians	2	2	0	0.0%	0	1	1	Short OJT	Post-sec.
53-6051	Transportation Inspectors	42	44	2	4.8%	2	10	12	Work Exp.	Post-sec.
53-6099	Transportation Workers, All Other	9	9	0	0.0%	0	3	3	Short OJT	Work Exp.
53-7000	Material Moving Workers	7,042	7,439	397	5.6%	406	1,943	2,349		
53-7011	Conveyor Operators and Tenders	30	30	0	0.0%	0	9	9	Short OJT	Work Exp.
53-7021	Crane and Tower Operators	87	83	-4	-4.6%	0	20	20	Moderate OJT	Work Exp.
53-7031	Dredge Operators	2	2	0	0.0%	0	1	1	Moderate OJT	Work Exp.
53-7032	Excavating and Loading Machine and Dragline Operators	212	209	-3	-1.4%	0	61	61	Moderate OJT	Work Exp.
53-7041	Hoist and Winch Operators	18	17	-1	-5.6%	0	5	5	Moderate OJT	Work Exp.
53-7051	Fork Lift, Industrial Truck and Tractor Operators	1,114	1,151	37	3.3%	37	338	375	Short OJT	Work Exp.
53-7061	Cleaners of Vehicles and Equipment	478	513	35	7.3%	35	176	211	Short OJT	Work Exp.
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	2,927	3,104	177	6.0%	177	971	1,148	Short OJT	Work Exp.
53-7063	Machine Feeders and Offbearers	774	778	4	0.5%	4	87	91	Short OJT	Work Exp.
53-7064	Packers and Packagers, Hand	1,091	1,189	98	9.0%	98	190	288	Short OJT	Work Exp.
53-7081	Refuse and Recyclable Material Collectors	228	281	53	23.2%	53	74	127	Short OJT	Work Exp.
53-7121	Tank Car, Truck, and Ship Loaders	6	5	-1	-16.7%	0	2	2	Moderate OJT	Work Exp.
53-7199	Material Moving Workers, All Other	75	77	2	2.7%	2	9	11	Short OJT	Work Exp.
	Nonclassifiable	3,567	3,801	234	6.6%	234	837	1,071		
66-0000	Nonclassifiable Occupations	3,567	3,801	234	6.6%	234	837	1,071		
66-2000	Nonclassifiable Occupations	3,567	3,801	234	6.6%	234	837	1,071		
66-2021	Leased Workers	726	755	29	4.0%	29	168	197		
66-2031	Sheltered Workshop Workers	283	339	56	19.8%	56	71	127		
66-2041	Non-covered Agricultural Workers	1,203	1,203	0	0.0%	0	273	273		
66-2051	Home Care Workers	1,355	1,504	149	11.0%	149	325	474		

Portland Metro LABOR TRENDS

Clackamas, Columbia, Multnomah, Washington, Yamhill, Clark (WA) & Skamania (WA) Counties



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December 2009

Economic Indicators

Unemployment Rates

Portland MSA	Seasonally Adjusted	Raw
Oct 2009	11.6%	10.7%
Sep 2009	11.5%	10.7%
Oct 2008	6.8%	6.3%
Oregon		
Oct 2009	11.3%	10.7%
Sep 2009	11.3%	10.6%
Oct 2008	7.2%	6.8%
United States		
Oct 2009	10.2%	9.5%
Sep 2009	9.8%	9.5%
Oct 2008	6.6%	6.1%

Nonfarm Payroll Employment

(not seasonally adjusted)

	October 2009	October 2008
Total	**982,200**	**1,035,800**
Construction	51,000	61,200
Manufacturing	110,600	121,600
Trade, Trans., & Utilities	192,500	202,700
Information	22,800	24,700
Financial Activities	64,500	67,200
Professional & Bus. Svc	124,600	135,300
Educ. & Health Services	137,100	136,300
Leisure & Hospitality	94,300	99,300
Government	147,800	148,500
High Tech *	48,400	50,300

* (manufacturing and nonmanufacturing)

Consumer Price Index (CPI)

United States	Oct '09	2008
Yearly Change	-0.2%	3.8%

Next release: December 16, 2009

Portland-Salem	1st Half '09	2008
Yearly Change	-1.0%	3.3%

Next release: mid-February 2010

www.bls.gov/cpi

University of Oregon Index of Economic Indicators

Aug. 2009	84.3
Sept. 2009	84.4

2008 Population

		2007-2008 % Change
Portland Metro	2,191,785	1.5%
Oregon	3,791,075	1.2%

Employment Trends: Local

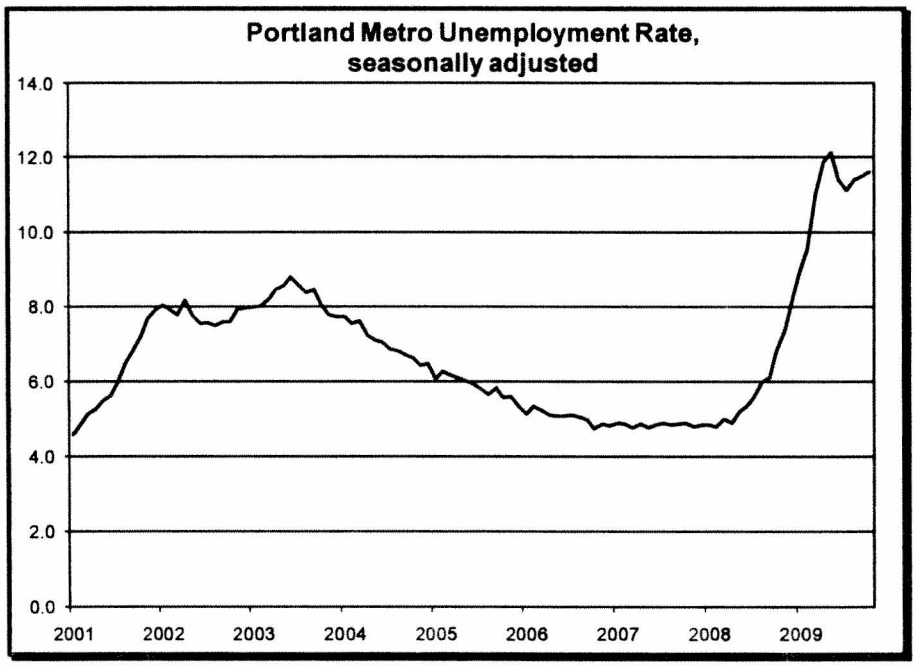
The Portland metro area's seasonally adjusted unemployment rate was essentially unchanged at 11.6 percent in October. The revised September rate was 11.5 percent, and the year-ago rate was 6.8 percent. An estimated 125,700 area residents were unemployed in October; 50,800 more than one year ago. To be counted as unemployed, a person must be actively seeking and available for work.

Oregon's unemployment rate was 11.3 percent in October, while the U.S. rate rose to 10.2 percent, its highest level in 26 years.

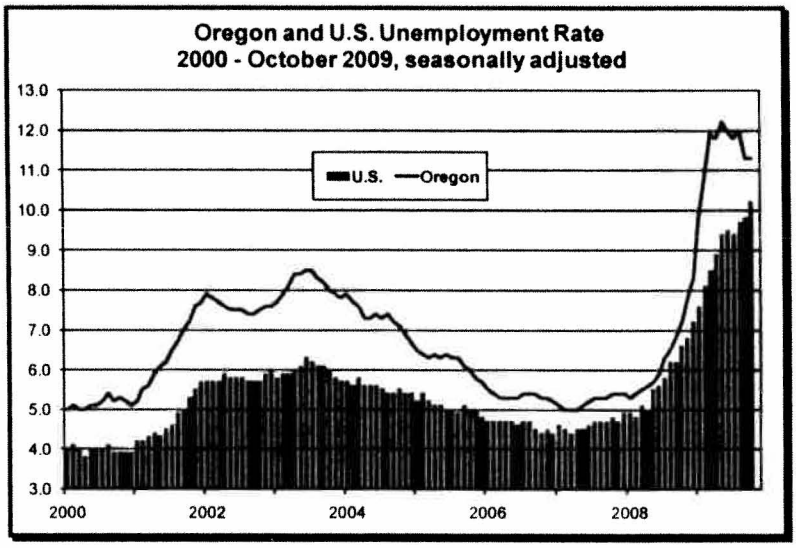
The Portland metro area's seasonally adjusted nonfarm payroll employment edged up by 400 jobs in October, following a loss of 2,300 (as revised) in September.

Since peaking in January 2008, the metro area has lost 67,800 jobs; a decline of 6.5 percent.

Construction cut 1,000 jobs, a few hundred more than typical for this time of year. Over the year, this industry is down 10,200 jobs



(-16.7%). Over the past two years, one-quarter of construction jobs have disappeared (-16,400).



Manufacturing declined by 700 jobs in October, with losses spread across most published components. This industry is down 11,000 jobs (-9.0%) over the year, and 15,800 (-12.5%) over the past two years. Nondurable goods and high tech manufacturing have each shed over 3,000 jobs since October 2007.

Trade, transportation, and utilities was flat in October as retailers held off seasonal hiring. Leisure and hospitality cut 1,900 jobs, about typical for October. Educational and health services also followed seasonal trends, adding 3,000 jobs as schools finished ramping up at the start of the school year.

Employment Trends: State

Oregon's seasonally adjusted unemployment rate was unchanged at 11.3 percent in October from the revised September figure of 11.3 percent. This was the lowest rate since the 10.7 percent rate in February, and was below the high of 12.2 percent in May. Oregon's unemployment rate was 7.2 percent in October 2008.

Oregon's seasonally adjusted October unemployment rate was only 1.1 percentage points above the U.S. unemployment rate. This is the closest Oregon's rate has been to the U.S. since December 2008 when the gap was also 1.1 percentage point.

In October, 210,325 Oregonians were unemployed. In October 2008, 135,071 Oregonians were unemployed.

Portland Metro Labor Trends is published by the Workforce and Economic Research Division of the Oregon Employment Department. *Portland Metro Labor Trends* also can be found on the Publications page at www.QualityInfo.org.

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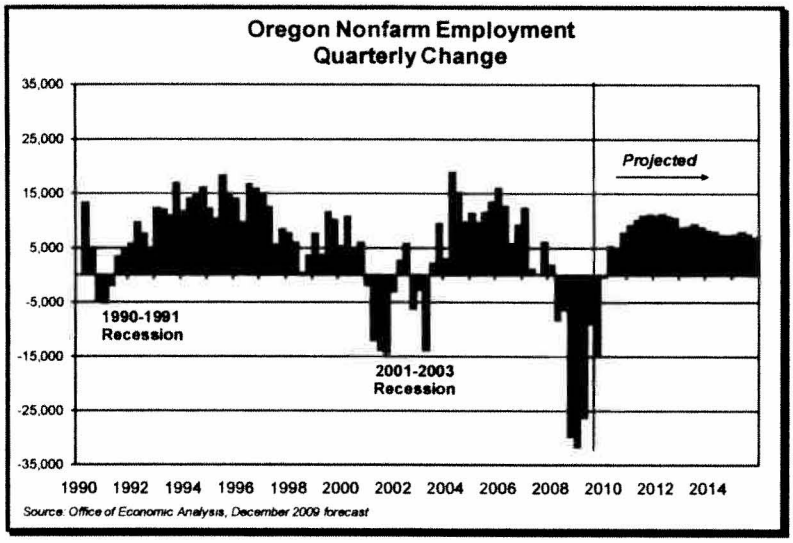
Oregon's seasonally adjusted nonfarm payroll employment dropped by 1,900 jobs in October, following a loss of 6,000 (as revised) in September.

In October, three major industries posted seasonally adjusted job losses of more than 1,000: manufacturing (-2,400 jobs), construction (-1,900), and leisure and hospitality (-1,500). Two of the other major industries posted gains: professional and business services (+1,500) and financial activities (+1,400).

Oregon Employment Forecast: Light at the End of the Tunnel?



The latest report from the state Office of Economic Analysis (OEA) declared that Oregon's recession is either over or is very close to ending. But don't break out the champagne just yet; the recovery won't feel like much of one to many unemployed Oregonians. The report forecasts that Oregon, as with the nation, will experience a jobless recovery in the initial stages.

How can the state or nation be in a recovery phase yet not be adding jobs? Nationally, recessions are defined by more than just unemployment. The National Bureau of Economic Research (NBER), the private, non-profit research organization that determines the beginnings and ends of downturns, looks at changes in economic output when dating recessions. They use gross domestic product, income, industrial production, wholesale and retail sales, and other data in addition to employment. It's entirely possible, and likely, that we can experience a significant increase in economic activity and output (i.e., recovery) without immediate job growth. Companies will first increase work hours and reduce furloughs of existing workers, and make better use of existing technology and equipment before hiring additional workers.

Here in Oregon, defining and dating recessions is a little more complicated because much of the data NBER uses at the national level either don't exist for states or the lag time in their availability is too long to be of timely use for dating purposes. In addition, we don't have an official agency that calls recessions. That said, OEA lists six factors they feel indicate that the recession in Oregon is ending, including national trends, the Oregon Index of Leading Economic Indicators, and analysis from the Federal Reserve. But they caution that only time will tell if their assessment is correct.

The December 2009 report forecasts Oregon will see an employment decline of 5.1 percent when the books are closed on 2009. All sectors of the economy are expected to end the year in the red with the exception of private education and health services. This broad industry has managed to survive the recession relatively intact, although the pace of growth has unquestionably slowed. Construction will be the hardest hit, contracting by 16.3 percent in 2009. Manufacturing is expected to decline 13.9 percent, pulled down by heavy losses in transportation equipment, wood products, and metals and machinery.

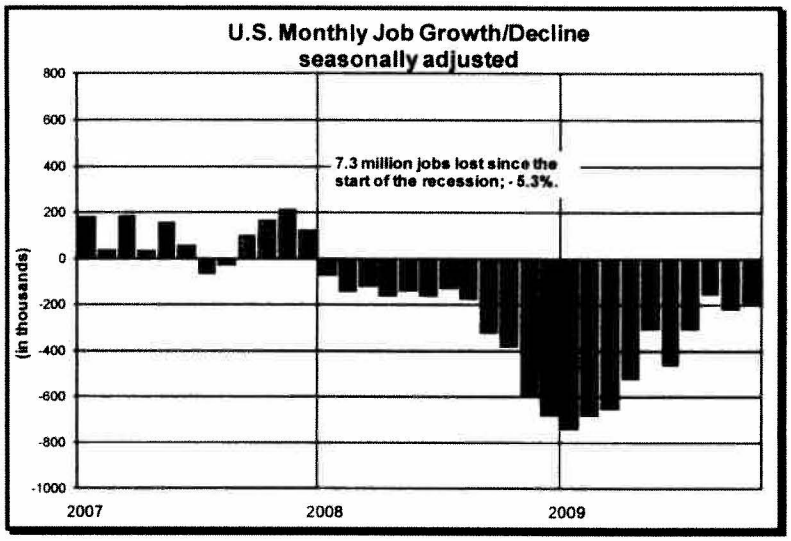
We'll start 2010 with mild job losses followed by modest growth in the second quarter through the end of the year. We won't see significant growth (above 2%) until 2011. It may be as late as 2013 before we return to pre-recession employment levels.

From start to finish, OEA forecasts that Oregon will lose 127,500 jobs over eight quarters, a decline of 7.3 percent. In comparison, employment declined by 11.5 percent over 12 quarters during the recession of the early 1980s.

Oregon lost jobs at a faster pace than the nation in 2008, and this trend is expected to repeat in 2009. Once we return to growth, however, Oregon should again outpace the nation.

The OEA's complete report is available at: www.oea.das.state.or.us.

Employment Trends: National



In October, the number of unemployed persons increased by 558,000 to 15.7 million. The unemployment rate rose 0.4 percentage point to 10.2 percent, the highest rate since April 1983. Since the start of the recession in December 2007, the number of unemployed persons has risen by 8.2 million, and the unemployment rate has grown by 5.3 percentage points.

Total nonfarm payroll employment declined by 190,000 in October. In the most recent three months, job losses have averaged 188,000 per month, compared with losses averaging 357,000 during the prior three months. In contrast, losses averaged 645,000 per month from November 2008 to April 2009. Since December 2007, payroll employment has fallen by 7.3 million.

Dusting off the Crystal Ball: Employment Projections Released

Predicting the future of the economy is always a difficult task. Predicting the future of an economy during times of rapid change, like a recession, is especially challenging. Nonetheless, every two years the Oregon Employment Department goes out on an economic limb to forecast job growth over the coming decade. These figures are based on historical trends, industry and demographic relationships, state and national forecasting models, population forecasts, and input from industry experts and outside economists.

After losing jobs in the years following the recession of 2001, the state experienced rapid employment growth from 2004 through 2007. In 2008, the base year for our employment projections, the state lost jobs and continued to lose jobs into 2009. Our 10-year projections do not try to forecast the beginning or end of the current recession or possible future recessions. Rather, the projections aim for a long-term average employment level, somewhere between the cyclical highs and lows.

Statewide

Despite the job losses caused by the recent recession, Oregon will almost certainly add jobs between 2008 and 2018. Our forecast calls for a gain of over 160,000 jobs, an increase of 9 percent. This percentage is similar to the 10 percent gain from 1998 to 2008 but lower than any 10-year gains seen in the prior quarter-century. The projection's slow job growth reflects recent job losses caused by the recession and a population forecast that has Oregon growing slower than it has since the early 1990s.

The forecast shows some regions within Oregon adding jobs at a much faster pace than other regions. We expect the most rapid growth in Central Oregon. This region has been growing partially because of its many recreational amenities, which will continue to attract people throughout the decade. Jobs in the region are expected to grow by 14 percent.

The state's other major population centers all have expected job growth rates of 10 percent, just above the statewide average. These centers include Portland, Eugene, Salem, and Medford. About half of the state's job growth will be in the Portland area. Many of the more rural regions in the state will see smaller growth rates, as they have in recent years as natural resource and manufacturing jobs have been lost. Morrow and Umatilla counties will have the smallest growth rate as the job losses that will occur when the chemical incineration work is completed offset the job gains in other local industries.

The Tri-County Area (Clackamas, Multnomah, and Washington Counties)

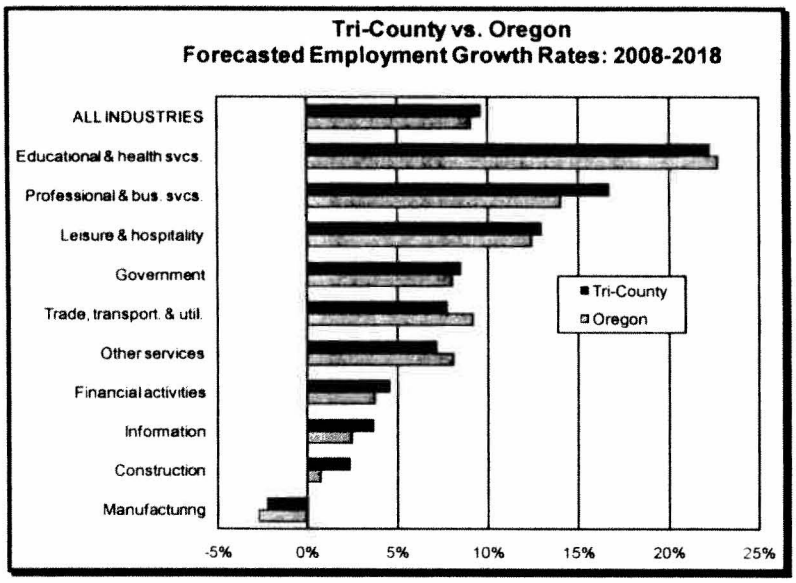
Summary

- The tri-county area is expected to add nearly 83,000 jobs between 2008 and 2018, an increase of 9.6 percent.
- Two broad industries are expected to account for half of the area's job growth:
  - Educational and health services, and
  - Professional and business services
- Manufacturing will likely rebound over the forecast period but is not expected to return to its employment level prior to the recent recession. Most of the sector's job losses will be in the manufacturing of durable goods.

We expect most broad industry sectors to add jobs between 2008 and 2018 (Chart 1). However, a few industries have been hit especially hard by the recession and employment levels may take most of the decade to recover.

Manufacturing is the only broad industry expected to lose jobs over the decade. We expect nearly all of the durable goods manufacturing sectors to lose jobs, led by computer and electronic products (high tech). This industry, which includes semiconductors, is expected to lose 900 jobs. The loss of the "traditional" semiconductor manufacturing jobs is actually expected to be higher, but those losses should be partially offset with gains in jobs at solar cell manufacturers.

Construction will most likely grow at a slow pace, adding very few jobs. After losing over one-quarter of its employment base during the recession, this industry will likely return to its historical share of about 5 percent of total employment.



The education and health services industry is expected to add nearly 24,000 jobs, the most of any industry. This translates into a 22 percent rate of growth over the decade, two and a half times the growth rate of total employment. Health care will add the vast majority of the new jobs due to the region's growing and aging population. The area's population age 65 or older is likely to grow by nearly 50 percent in the forecast period. Educational services are expected to grow by about 15 percent (3,000 jobs); almost twice as fast as statewide due to a faster anticipated growth rate in the school-aged population.

Professional and business services will likely be another fast growing industry and is projected to grow by 17 percent and add 19,800 jobs. Half of these new jobs will be in the professional and technical services component. Firms in this subsector include offices of lawyers, certified public accountants, tax preparers, architects, engineers, photographers, veterinarians, graphic designers, and interior designers, to name the most common examples. One-third of the new jobs will be in the administrative and support services component, an industry that provides workers and support to other businesses.

Leisure and hospitality is expected to add 10,600 jobs over the decade for a growth rate of 13 percent. The largest component of this industry, restaurants, will add the bulk of the new jobs.

Trade, transportation, and utilities should grow about 8 percent over the decade, slightly slower than the region's overall growth rate. This is the largest sector in the region's (and state's) economy, and it will likely add 13,200 jobs, the third largest addition of any industry. Retail trade is the largest component of this sector and will add 6,700 jobs and grow 8 percent; below population and overall job growth rates. The slower pace is due to a slowing trend in the number of motor vehicle dealers and building materials stores, and the growing trend of internet shopping.

The government sector should add 9,700 jobs, an increase of over 8 percent. Federal government could see declining employment due to reductions in Postal Service employment. Local governments are likely to grow at close to the pace of the state's overall economy.

The full projections are available on www.QualityInfo.org. Select a region from the map and look in the Publications tab for Regional Projections by Industry and Occupation 2008-2018.

Around the Region

A listing of employment-related events making recent news

- **Powin Corporation** is building a 71,000-square-foot plant in **Tualatin** to manufacture 20-kilowatt wind turbines. It expects to employ 95 people. *Tualatin Times, 10-22-09*
- **Studer's**, a floor covering business in **Vancouver**, is closing. About 33 installation specialists and sales and support staff will be laid off. *The Columbian, 10-22-09*
- **Kaiser Permanente Murrayhill Medical Office** opened in **Beaverton**, employing 2 family practice doctors, 2 physician assistants as well as support staff. *Beaverton Valley Times, 10-15-09*
- **Sweetest Thing Cupcakes**, a specialty bakery and café, opened in **Newberg**. *Newberg Graphic, 10-27-09*
- **Key Bank** will open in **Troutdale** early next year, employing seven. *Gresham Outlook, 10-21-09*
- **Orbit Medical Inc.**, a supplier of durable medical equipment, will open at the **Scholls Business Center** in **Portland**. *Portland Business Journal, 10-9-09*
- **Dita's Chocolates**, a European-style chocolate shop, will open in **Sandy**. *Sandy Post, 10-27-09*
- Sunnyvale, Calif.-based chip-maker **Allvia Inc.** has acquired the 178,000-square-foot **Hillsboro** manufacturing plant once operated by **ETEC Systems Inc.** It will start chip-production sometime next year. It is not known how many people it will employ. *Portland Business Journal, 10-23-09*
- **Creative Minds Preschool** will open in **Milwaukie**. *Portland Business Journal, 10-23-09*
- **Shari's Restaurant** at **Garrison Square** in **Vancouver** will close. About 35 employees were offered jobs at three other area Shari's locations. *The Columbian, 10-19-09*
- **Video HQ** in **Molalla** closed. *Molalla Pioneer, 10-26-09*
- **Coldwell Banker Executive Realty** in **McMinnville** closed. *News-Register, 11-2-09*
- **Princeton Athletic Club** in **Vancouver** closed. *The Columbian, 11-3-09*
- **Oregon Health & Science University** will receive at least $51.5 million in stimulus funding to pay for research, equipment, and new employees. The funds provide a significant boost to research at Portland-based OHSU, which already receives more than $200 million each year from the **National Institutes of Health**. *Portland Business Journal, 10-19-09*
- **Sun Microsystems Inc.** will lay off 42 workers across three **Hillsboro** locations. *Portland Business Journal, 11-5-09*
- **Marten Law PLLC,** a Seattle-based environmental and energy law firm, opened an office in **Portland**. It will provide clients with regulatory and litigation services in energy, environmental, and climate change. The 12-attorney team will be the area's largest environmental and energy legal team. *Portland Business Journal, 11-9-09*

- **Larkspur Wellness**, a massage business, opened in **Vancouver**. *The Columbian, 10-19-09*
- **Archive Systems Inc.**, a New Jersey-based records management firm, will open at the **Birtcher Center** in **Fairview**. *Portland Business Journal, 11-6-09*
- **Chariteas**, a tea shop, opened in **Sandy**. *Sandy Post, 11-3-09*
- **AOP Technologies Inc.** – a provider of solutions for automation, production, and sealing applications – will open at the **Quad 205 Business Park** in **Vancouver**. *The Columbian, 10-19-09*
- **Trillium House**, a pre-school with an after-school program, will open in **Gresham**. *Gresham Outlook, 10-21-09*
- **Kraven's Sports Bar** opened in **Wilsonville**. *Wilsonville Spokesman, 11-10-09*
- **Rockwell Collins**, a communication and aviation electronics company, is closing its San Jose site and moving those jobs –including about 120 engineering positions- to its **Wilsonville** facility, where it employs approximately 300 people. *Wilsonville Spokesman, 11-17-09*
- The **Big Kmart** store in **Vancouver** will close in February. It employs 68 people. *The Columbian, 11-14-09*
- **Taco Time** will open in **Milwaukie**. *Portland Business Journal, 11-13-09*
- **Cascade Steel Rolling Mills** in **McMinnville** laid off 30 workers. This is the fourth round of layoffs in the last 12 months. *News-Register, 11-14-09*
- **Banner Bank** opened in **Lake Oswego**. *Portland Business Journal, 11-17-09*
- **Acumed LLC** purchased the former Hansen Architectural Systems Inc. plant in **Hillsboro** for an expansion of its orthopedic manufacturing business. *Portland Business Journal, 11-6-09*
- A **Sherwin-Williams** paint store opened in **Newberg**. *Newberg Graphic, 11-17-09*
- **The Bar Method**, a fitness conditioning studio, will open in **northwest Portland**. *Portland Business Journal, 11-20-09*
- **Kerry's Deluxe Furniture, Home and Garden** opened in **Dundee**. *Newberg Graphic, 11-24-09*
- **Walton Physical Therapy** opened a second clinic in **Durham**. *Tigard Times, 11-21-09*
- **The Club at the Historic Reserve** in **Vancouver**, a downtown club geared to businesspeople, closed. **The Restaurant at the Reserve** will remain open. *The Columbian, 11-19-09*
- The **Willamette Valley Vineyards Wine Center** will open in **McMinnville**, serving as a first stop for people who travel every year to Oregon wine country, and providing information on vineyards, restaurants, lodging, and sustainable agricultural practices. *The Oregonian, 11-19-09*
- **Molalla's Main Street Pizzeria** will open in **Molalla**. *Molalla Pioneer, 11-23-09*

Portland-Vancouver-Beaverton MSA Labor Force and Industry Employment

	October 2009	September 2009	October 2008	—Change from— September 2009	October 2008
LABOR FORCE STATUS					
Civilian Labor Force	1,172,200	1,168,100	1,181,700	4,100	-9,500
Unemployed	125,700	124,600	74,900	1,100	50,800
Unemployment Rate	10.7%	10.7%	6.3%		
Unemployment Rate, seasonally adjusted	11.6%	11.5%	6.8%		
Total Employed	1,046,500	1,043,600	1,106,800	2,900	-60,300
NONFARM PAYROLL EMPLOYMENT					
Total nonfarm	**982,200**	**975,300**	**1,035,800**	**6,900**	**-53,600**
Total nonfarm, seasonally adjusted	**974,500**	**974,100**	**1,027,700**	**400**	**-53,200**
Total private	**834,400**	**836,200**	**887,300**	**-1,800**	**-52,900**
Mining and logging	**1,400**	**1,400**	**1,500**	**0**	**-100**
Construction	**51,000**	**52,000**	**61,200**	**-1,000**	**-10,200**
Construction of buildings	12,300	12,600	14,200	-300	-1,900
Residential building construction	6,700	6,800	7,500	-100	-800
Nonresidential building construction	5,600	5,800	6,700	-200	-1,100
Heavy and civil engineering construction	5,200	5,300	6,000	-100	-800
Specialty trade contractors	33,500	34,100	41,000	-600	-7,500
Manufacturing	**110,600**	**111,300**	**121,600**	**-700**	**-11,000**
Durable goods	83,100	83,700	91,600	-600	-8,500
Wood product manufacturing	4,000	4,100	4,700	-100	-700
Primary metal manufacturing	5,600	5,700	7,200	-100	-1,600
Fabricated metal product manufacturing	12,500	12,600	13,600	-100	-1,100
Machinery manufacturing	6,800	6,800	8,300	0	-1,500
Computer and electronic product manufacturing	33,700	33,900	35,500	-200	-1,800
Semiconductor and electronic component mfg.	25,300	25,400	26,400	-100	-1,100
Electronic instrument manufacturing	4,800	4,800	5,200	0	-400
Transportation equipment manufacturing	7,500	7,500	7,300	0	200
Nondurable goods	27,500	27,600	30,000	-100	-2,500
Food manufacturing	9,300	9,400	9,300	-100	0
Paper manufacturing	3,800	3,900	4,400	-100	-600
Trade, transportation, and utilities	**192,500**	**192,700**	**202,700**	**-200**	**-10,200**
Wholesale trade	53,900	54,200	56,900	-300	-3,000
Merchant wholesalers, durable goods	24,700	24,800	27,000	-100	-2,300
Merchant wholesalers, nondurable goods	20,600	20,800	21,300	-200	-700
Electronic markets and agents and brokers	8,600	8,600	8,600	0	0
Retail trade	104,100	104,000	108,400	100	-4,300
Motor vehicle and parts dealers	12,800	12,800	13,200	0	-400
Food and beverage stores	20,500	20,400	20,900	100	-400
Clothing and clothing accessories stores	9,800	10,000	10,800	-200	-1,000
General merchandise stores	20,000	19,900	20,900	100	-900
Transportation, warehousing, and utilities	34,500	34,500	37,400	0	-2,900
Air transportation	3,600	3,600	3,900	0	-300
Truck transportation	10,000	10,100	11,100	-100	-1,100
Couriers and messengers	4,400	4,400	4,900	0	-500
Warehousing and storage	3,500	3,500	3,900	0	-400
Information	**22,800**	**22,700**	**24,700**	**100**	**-1,900**
Publishing industries, except internet	9,100	9,000	10,000	100	-900
Software publishers	6,700	6,700	6,800	0	-100
Telecommunications	6,000	6,000	6,300	0	-300

Nonfarm Payroll Employment (continued)

	October 2009	September 2009	October 2008	—Change from— September 2009	October 2008
Financial activities	**64,500**	**64,700**	**67,200**	**-200**	**-2,700**
Finance and insurance	41,600	41,700	42,700	-100	-1,100
Credit intermediation and related activities	18,800	18,900	19,800	-100	-1,000
Insurance carriers and related activities	18,700	18,700	19,000	0	-300
Real estate and rental and leasing	22,900	23,000	24,500	-100	-1,600
Real estate	18,600	18,700	19,900	-100	-1,300
Professional and business services	**124,600**	**125,300**	**135,300**	**-700**	**-10,700**
Professional and technical services	50,900	51,100	54,100	-200	-3,200
Architectural and engineering services	10,800	10,900	12,300	-100	-1,500
Computer systems design and related services	8,000	8,000	8,000	0	0
Management of companies and enterprises	22,500	22,500	23,200	0	-700
Administrative and waste services	51,200	51,700	58,000	-500	-6,800
Administrative and support services	48,700	49,100	55,200	-400	-6,500
Employment services	19,000	19,000	22,600	0	-3,600
Business support services	7,400	7,500	8,000	-100	-600
Services to buildings and dwellings	13,400	13,600	14,800	-200	-1,400
Educational and health services	**137,100**	**134,100**	**136,300**	**3,000**	**800**
Educational services	25,400	23,000	25,600	2,400	-200
Colleges and universities	13,000	11,400	13,300	1,600	-300
Health care and social assistance	111,700	111,100	110,700	600	1,000
Ambulatory health care services	43,500	43,400	42,600	100	900
Hospitals	29,000	29,100	29,400	-100	-400
Nursing and residential care facilities	21,800	21,800	21,500	0	300
Social assistance	17,400	16,800	17,200	600	200
Leisure and hospitality	**94,300**	**96,200**	**99,300**	**-1,900**	**-5,000**
Arts, entertainment, and recreation	13,700	14,700	14,300	-1,000	-600
Amusement, gambling, and recreation	9,700	10,900	10,200	-1,200	-500
Accommodation and food services	80,600	81,500	85,000	-900	-4,400
Accommodation	8,900	9,000	9,500	-100	-600
Food services and drinking places	71,700	72,500	75,500	-800	-3,800
Full-service restaurants	34,400	34,900	36,100	-500	-1,700
Limited-service eating places	30,900	31,300	32,200	-400	-1,300
Other services	**35,600**	**35,800**	**37,500**	**-200**	**-1,900**
Membership associations and organizations	16,400	16,400	17,000	0	-600
Government	**147,800**	**139,100**	**148,500**	**8,700**	**-700**
Federal government	18,700	18,500	18,500	200	200
State government	21,900	19,800	21,700	2,100	200
State education	8,100	6,000	7,800	2,100	300
Local government	107,200	100,800	108,300	6,400	-1,100
Local education	60,500	54,100	60,800	6,400	-300
Labor Disputes	0	0	1,400	0	-1,400

The most recent month is preliminary, the prior month is revised. Prepared in cooperation with the U.S. Department of Labor, Bureau of Labor Statisti

Labor Force Status: Civilian labor force includes employed and unemployed individuals 16 years and older by place of residence. Employed includes payroll employment, self-employed, unpaid family workers, domestics, agriculture, and labor disputants. Unemployment rate is calculated by dividing unemployed by civilian labor force.

Nonfarm Payroll Employment: Data are by place of work and cover full- and part-time employees who worked or received pay for the pay period that includes the 12th of the month. The data exclude the self-employed, volunteers, unpaid family workers, and domestics.

"Mining and logging" formerly titled "Natural resources and mining". The definition is the same.

Resident Labor Force and Unemployment for Regions Within the Portland-Vancouver-Beaverton MSA

	October 2009	September 2009	October 2008	-Change From- September 2009	-Change From- October 2008
Portland-Vancouver-Beaverton MSA					
Civilian labor force	1,172,200	1,168,100	1,181,700	4,100	-9,500
Unemployed	125,700	124,600	74,900	1,100	50,800
Unemployment rate	10.7	10.7	6.3	0.1	4.4
Unemployment rate, seasonally adjusted	11.6	11.5	6.8	0.1	4.8
Employed	1,046,500	1,043,600	1,106,800	2,900	-60,300
Oregon portion of the MSA					
Civilian Labor Force	948,900	946,900	960,600	2,000	-11,700
Unemployed	96,900	97,600	59,200	-700	37,700
Unemployment rate (not seasonally adjuste	10.2	10.3	6.2	-0.1	4.0
Total Employed	851,900	849,400	901,300	2,500	-49,400
Clackamas County					
Civilian Labor Force	200,900	200,100	203,100	800	-2,200
Unemployed	20,800	20,500	12,500	300	8,300
Unemployment rate	10.3	10.3	6.2	0.0	4.1
Unemployment rate, seasonally adjusted	10.6	10.6	6.5	0.0	4.1
Total Employed	180,100	179,600	190,600	500	-10,500
Columbia County					
Civilian Labor Force	24,590	24,480	24,580	110	10
Unemployed	3,070	3,030	1,820	40	1,250
Unemployment rate	12.5	12.4	7.4	0.1	5.1
Unemployment rate, seasonally adjusted	13.4	13.8	7.9	(0.4)	5.5
Total Employed	21,520	21,450	22,770	70	-1,250
Multnomah County					
Civilian Labor Force	387,700	387,200	391,800	500	-4,100
Unemployed	41,100	41,600	25,100	-500	16,000
Unemployment rate	10.6	10.8	6.4	(0.2)	4.2
Unemployment rate, seasonally adjusted	10.9	11.1	6.7	(0.2)	4.2
Total Employed	346,600	345,600	366,700	1,000	-20,100
Washington County					
Civilian Labor Force	288,100	287,600	292,900	500	-4,800
Unemployed	27,000	27,200	16,600	-200	10,400
Unemployment rate	9.4	9.5	5.7	(0.1)	3.7
Unemployment rate, seasonally adjusted	9.7	10.0	5.9	(0.3)	3.8
Total Employed	261,200	260,400	276,300	800	-15,100
Yamhill County					
Civilian Labor Force	47,560	47,530	48,180	30	-620
Unemployed	5,030	5,130	3,180	-100	1,850
Unemployment rate	10.6	10.8	6.6	(0.2)	4.0
Unemployment rate, seasonally adjusted	11.6	11.9	7.3	(0.3)	4.3
Total Employed	42,530	42,400	44,990	130	-2,460
Washington portion of the MSA (Clark and Skamania counties)					
Civilian Labor Force	223,300	221,200	221,200	2,100	2,100
Unemployed	28,700	27,000	15,700	1,700	13,000
Percent of Labor Force	12.9	12.2	7.1	0.7	5.8
Total Employed	194,600	194,200	205,500	400	-10,900

Components may not sum exactly to totals due to rounding.

Estimates of labor force and unemployment for MSA components are based in part on the most recent population estimates and Unemployment Insurance claims data.

Or
Wc
875 Union St NE
Salem OR 97311

ID#3237 Qt=1 Lb=1

CITY OF NEWBERG
BARTON BRIERLY, CITY PLANNER
PO BOX 970
NEWBERG OR 97132

Statewide Recruitment, Retention & Expansion Projects
Oregon Economic & Community Developement

7/28/2006

Number of Groups: 12

Group Name	Description
Atmosphere	Metals Recruitment. Large power user. Lead came through CoreNet. Department continues to work the lead. 7/06
Charlie	Call Center project for a financial services company. The project would employ 150 to start and anticipates 300 employees at full capacity. They are looking for a Pacific Time Zone location. Eugene and Springfield have made the short list. Company reps will visited in April. 6/9 Still on the short list. 7/21 - This project is likely not going to go forward at this time.
Doctor	Medical products company considering relocation from California. 50 employees. Project is on hold for the foreseeable future but could come back at a future date. 7/06
Grit	This project that is looking for 10 contiguous acres of waterfront industrial for the development of a grinding plant. The company would import fine aggregates (sand) via water transportation . They would like to either purchase or enter a long term lease (30 years).
Moulding	A MDF company looking to expand in Oregon. Produces paintable moldings. 200K sf building required or 20-30 acre greenfield. 150-200 jobs. 7/28 They will be visiting So. Oregon during the week of Aug 7th
Mustang	Trailer Manufacturer. 100 jobs. Visited Oregon on several occasions looking for a location to expand to the west coast. Shortlisted to two sites in Linn County. 7/28 Pace American announced they are locating in Lebanon, OR They will start with 30-50 employees and expect to expand to as many as 100 within a year. This recruitment started in July 2004 and was eventually landed with a lot of patience and work.
Noah II	Manufacturing project would invest $110 million initially with a second business investment of $80 million. Combined total of 500 jobs. Short list of sites in mid/lower willamette valley. 7/06
Piping	Looking at sites along the Columbia River. $50 million project that needs 15 acres with water access. 7/06 Update - several messages have been left but client no longer responds.
Pita II	California food company looking to relocate in Oregon. Waiting for the right building/site and not in a big rush. Currently reviewing potential existing sites. 7/06
Robin	Representing a multi-national food processor wanting to locate a facility on the west coast. Looking at CA, OR, WA and NV 6-06 Presentation to be made to company in late July 7/06
Sand	Company that make products for the home building/improvement market. Looking for 10-20 acre rail sites along I-5 or I-84. Their raw materials come via rail from Idaho. 30-60 jobs
Sky	Established kit plane manufacturer wants to move to the US. They would like to locate to a small community with an uncontrolled airport. They need to lease or buy a building of 10K sf with direct access to a taxiway. Initial employment of 30. (7-18-06)

Recent Transactions

1100 Madison St. NE, Salem - Sold for $105,000

Tax Lot 1101, Lyons-Mill City Dr., Lyons - Sold for $190,000

2754 Hwy 99E, Hubbard - Sold for $900,000

Lot 3 Industrial Way, Hubbard - Sold for $260,000

580 19th St. SE, Salem - Sold for $237,200

2844 Hwy 99E, Hubbard - Leased 5,000 SF at $0.65/SF/MO - NNN

Current Client Needs

1. Lease - 3,000 SF retail space with 9-10,000 SF warehouse in Salem area. Needed by Feb. 2008.
2. Lease - .5 to 1 acre with a 30-40,000 SF building in Salem area, Industrial General zoned. 10,000 SF office space and the rest in warehouse. Dock and grade doors, 3-phase power and 18'-20' ceiling height.
3. Sale - 1.5 to 3 acres of bare land along I-5 corridor. Utilities need to be readily available to site and existing surface streets. Required zone: commercial use or any zone used for lodging.
4. Sale - 5-10,000 SF building anywhere between Salem and Brooks. Building requirements include 1 dock door, 1 grade door and easy freeway access.
5. Lease - 7-30,000 SF building with dock in the Salem area. Site needs fenced area for company vehicles.
6. Sale - Bare land or build-to-suit 30,000 SF building with 5 acres.
7. Sale - 40,000 SF building on 3-4 acres. Building requirements include 3-phase power with 1200 amps, 18'-24' ceiling height, minimal office space. Preferably located in Beaverton, Canby, Woodburn or Salem.
8. Sale/Lease - 10,000 SF building, Industrial General or Light Industrial zoned. Preferably located anywhere between Salem and Woodburn.
9. Lease - 3-4,000 SF building with .25 to .5 acres for yard. Building requirements include 16'-18' ceiling height, small office and rest room. Preferably located anywhere between Woodburn and Albany.
10. Sale - Industrial building with 9-10% cap rate. Retail or office properties will be considered.

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COLDWELL BANKER COMMERCIAL
Mountain West Real Estate, LLC

13201 Wilco Hwy - Woodburn, OR
Sale Price: $1,414,000.00
Size: Bldg #1 16,000 SF +/- Bldg #2 12,000 SF +/- Bldg #3 2,400 +/-
Zone: Industrial/Commercial General
Features: Property has 3 buildings and a 3 bedroom/2 bath manufactured home on approx. 3.22 AC +/- . Power 3 phase 240V. Easy access to I-5.

Wilco Rd. - Stayton, OR
Sale Price: $2,267,770.00
Size: 12.25 +/- AC in three parcels
Zone: Light Industrial
Features: Property can be purchased as a package or separately. Water and sewer are stubbed to the parcel.

4th and Birch St. - Turner, OR (Lots 6300 & 7700)
Lease Rate: $0.45/SF/MO - NNN (approx. cost for build-to-suit)
Size: 10,000 SF +/- Build-to-suit
Zone: M1
Features: Rare build-to-suit opportunity in Turner. Fenced yard; warehouse/office buildouts and grade level doors are negotiable.

580 19th St. SE Sp. B - Salem, OR
Lease Rate: $0.47/SF/MO - MG
Size: 2,250 SF +/-
Zone: IG
Features: Newly remodeled one story concrete block building. 2 grade level doors; ceiling height approx. 13'6"; power 110-220V; 253 SF+/- office ; restroom and mezzanine storage. Great location for easy access to all points of Salem as well as I-5.

Current Client Needs

1. **Purchase** - Investor looking for income producing property. Prefers Industrial but will consider Retail or Office.
2. **Lease/Purchase** - 10,000 - 20,000 SF with 1,500 to 2,000 SF of office; 3 phase 1,000 amps or more electrical; 1 AC yard and bridge cranes (*optional*). Prefers location in Donald, Hubbard, Canby, Oregon City or Woodburn.
3. **Purchase** - 1.5 to 3 AC of bare land along I-5 corridor. Utilites and existing surface streets need to be readily available to site. Required zone: commercial use or any zone for lodging.
4. **Lease/Purchase -** 10,000 - 20,000 SF building; 1 grade door; 220V power and 1 restroom with yard area in the Salem to Brooks area. Needs close access to I-5.
5. **Purchase** - Bare land to do build-to-suit on 2-5 acres. To build 24,000-30,000 SF single story building with 1-2 docks; 1-2 grade doors; 20' ceiling height and office.

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Coldwell Banker Commercial
Mountain West Real Estate, LLC

Our doors are always open for you at 250 Division St. NE - Salem, OR

Recent Transactions

19527 Grim Rd - Aurora, OR	5 year lease	93,500 SF	$.265/SF/MO - NNN
580 19th St. SE Sp. A - Salem, OR	5 year lease	1,625 SF	$650.00/MO - MG
580 19th St. SE Sp. B - Salem, OR	3 year lease	2,250 SF	$950.00/MO - MG
3589 Fairview Industrial Way - Salem, OR	MO to MO	2,221 SF	$1200.00/MO - MG
340 Thelma Lane NE - Salem, OR	3 year lease	6,000 SF	$.35/SF/MO - MG
7720 4th St. - Turner, OR	3 year lease	3,456 SF	$1200.00/MO - MG

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Coldwell Banker Commercial
Mountain West Real Estate, LLC

Lee M. Does
Dr. Amy L. Does
173 NE Renne Road
Newberg, Oregon 97132

14 January 2010

Newberg Planning Commission
401 E. Third Street
Newberg, Oregon 97132

re: Revised Newberg Economic Opportunities Analysis

Dear Planning Commission Chair:
We thank you for the opportunity to continue the discussion of the Newberg EOA. The EOA is an essential component to expanding Newberg's existing boundaries, and as such must survive serious scrutiny. We note that the revised EOA has been modified to adopt "Safe Harbor" population and employment projections, rather than accepting state economist's predictions for a slow and prolonged recovery. We believe the state's projections are accurate, and are in fact already being proven out by the permanent closure of Suntron and ongoing cutbacks at the mill.

We would argue that the city has failed to demonstrate a sense of urgency for a massive boundary expansion of some 2100 acres. We would likewise remind all parties that the EFU land surrounding Newberg is by state law already protected from owner-driven development, but would suffer from owner disinvestment if prematurely placed in long-term reserve status. We believe the EOA is both unrealistic and poorly timed, and at the very least should be revised to reflect current conditions and statewide economic projections.

The economy will almost certainly improve with time. State economists are predicting only modest growth over the next decade, however, as businesses struggle to rebuild. Both state and local projections appear in agreement that the leading growth industries will be healthcare and education. These industries are already in place in Newberg. Per the EOA, George Fox, Providence, and newcomer PCC already have sufficient reserve lands for the foreseeable future. The wine industry continues to expand and prosper on it's own, with recent infill into storefronts in the downtown core.

My wife Amy and I have been participating in this process in good faith for over six years. What is disappointing to us is the lack of compromise or new ideas coming from the city. The overwhelming majority of other locals attending these meetings have invariably voiced the same quality-of-life concerns over traffic and loss of farmland, yet Newberg continues to ignore the will of its own people. We trust you will agree, and ask that you reject the EOA in its current form.

Sincerely,

Lee M. Does
Amy L. Does, PhD.

Lee M. Does
Dr. Amy L. Does
173 NE Renne Road
Newberg, Oregon 97132

5 January 2010

Newberg Planning Dept.
Jessica Nunley, Planner
414 E. 1st Street
Newberg, Oregon 97132

re: Newberg Economic Opportunities Analysis

Dear Ms. Nunley:
My wife Amy and I understand that the goal of the EOA is to identify long-term goals as well as long-term strategies for shaping the future of Newberg. We likewise believe you were speaking in earnest at the 10 December planning meeting, when you reminded the commission that the EOA was attempting to address a 20-30 year timeline. We noted your conclusions were heavily weighted by pre-recession studies, however, including Johnson-Gardner employment and growth figures published in 2004. Given the realities of a nationwide recession and greater than 12% local unemployment, we'd like to call your attention to the 11/2009 Oregon State Employment Projections report by Nick Beleiciks. and available online at http://www.qualityinfo.org/olmisj/ArticleReader?itemid=00006783.

The report anticipates Oregon employment through 2018, and suggests a substantially different balance than what's presented in your current EOA. Where the EOA touts manufacturing as Newberg's second-largest employer, state economists are predicting a 9% loss of manufacturing within less than ten years. This information is especially timely, as Newberg has repeatedly argued the need for creating new industrial lands as a means for augmenting the $138-million annual payroll claimed in the EOA. We believe the State's projections are already being confirmed by ongoing job losses at the Newberg paper mill, and the recent closure of Suntron Electronics.

Our country has clearly entered a protracted period of more restrained growth, and recent employment losses in Newberg have clearly demonstrated that our city cannot expect a stable or long-term future from either piecework assembly jobs or large-scale processing plants.

We believe the Newberg EOA document is not supported by either current financial trends or statewide economic forecasts. While we applaud the city for attempting such far-reaching planning, we ask that you revise your document to reflect current conditions and statewide economic projections.

Sincerely,

Lee M. Does
Amy L. Does, PhD.

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Planning & Building Division
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PLANNING AND BUILDING DEPARTMENT

P.O. Box 970 • 414 E. First Street • Newberg, Oregon 97132 • (503)537-1240 • Fax (503)537-1272

HEARING NOTICE

The **Newberg Planning Commission** will hold public hearings on January 14, 2010 at 7 p.m. at the Newberg Public Safety Building, 401 E. Third Street, Newberg, OR, to evaluate the following proposals:

1) Affordable Housing Action Plan Implementation. (Hearing continued from December 10, 2009). The Planning Commission will consider changes to the Newberg Development Code to support the development of more affordable housing. The changes would do the following:

- Add a definition regarding "special needs housing";
- Allow reduction of parking requirements where an affordable housing development is near a transit stop or where the development provides its own transit;
- Modify current driveway standard to allow more than two lots per driveway; and
- Define the process for allowing accessory dwelling units.

File # G-09-007

2) Revise the Economic Opportunities Analysis. (Hearing continued from December 10, 2009, at the point of deliberation. Public testimony was closed but may be reopened at the discretion of the Planning Commission). The Economic Opportunities Analysis (EOA), adopted in 2006, is a section of the Comprehensive Plan and also helps implement Statewide Goal 9 (Economic Development). The EOA revisions include updated buildable land inventories for commercial and industrial land, updated demographic and economic statistics, and updated information regarding Newberg's economic development strategy. File # CPTA4-09-001.

You may examine information regarding these proposals at the Newberg Planning and Building Department, 414 E. First Street, Newberg, OR 97132, or at www.newbergoregon.gov. The staff recommendations regarding these proposals will be available one week before the public hearing at www.newbergoregon.gov (a link will be posted on the Upcoming Public Meetings calendar for January 14, 2010). If you have any questions, please call the Newberg Planning Division at 503-537-1240. All interested persons may appear and provide testimony. Any written testimony must be submitted by **January 7, 2010.** Only those persons who participate either orally or in writing in the hearing proceedings leading to the adoption of the action may appeal the decision.

Date Posted: 12/31/2009

1000 friends of Oregon

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Southern Oregon Office • PO Box 2442 • Grants Pass, OR 97528 • (541) 474-1155 • fax (541) 474-9389
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DEC 28 2009

December 28, 2009

Newberg Planning Commission
Lon Wall, Chair
414 E. First Street
Newberg OR 97132

Dear Commissioners and Staff:

On December 10th, 2009 the Planning Commission took testimony on the draft *Revised Economic Opportunities Analysis* (*EOA*), dated November 2009. We appreciate the opportunity we had to present testimony and the thoughtful comments of the various Planning Commissioners. The Planning Commission voted to consider the matter further at its next meeting scheduled for January 14, 2010.

We continue to believe the draft *EOA* overestimates the amount of employment land Newberg will need over the planning period and underestimates the capacity of available lands within the existing UGB to meet those needs, resulting in potential overexpansion of the urban area.

We are uncertain as to whether additional written or oral testimony will be accepted, but we wish to clarify the following issues that arose after public testimony concluded on December 10th.

1. Employment projections are based on outdated, pre-recession forecasts.

During the staff response to testimony, Assistant Planner Jessica Nunley stated that the *EOA* is based on current data. This is incorrect, at least regarding the job growth projections that form the basis for the *EOA*. The draft *EOA* explicitly states:

> **Employment Projections**
>
> In 2004, Johnson-Gardner prepared future industrial employment projections based on long-range employment forecasts by the Oregon Employment Department. Employment projections are shown in Table 12- 12 below.[1]

As we pointed out in our previous testimony, the job growth projections that form the basis for the proposed revisions to the *EOA* were prepared over 5 years ago in a very different economy and were based on even older long-range employment forecasts by the State of Oregon. It makes no sense to base major revisions to the comprehensive plan on outdated data and forecasts, rather than on current forecasts that are readily available.

[1] Draft *EOA*, November, 2009, p. 24. Nearly identical language appears on p. 39 of the *EOA*.

The Oregon Employment Department (OED) updates its long-range industry employment forecasts every two years.[2] In the last two years, the local economy has shed thousands of jobs in the worst recession in decades. It will take years to return to our pre-recession job levels and even longer to grow significantly beyond them. Industrial sectors have been particularly hard hit.

OED most recently released long-range forecasts in November of 2009, covering the years 2008 through 2018. (see attached article from OED website). We have attached the latest OED long-range forecast for Region 3, which includes Yamhill County. (see attachment 2). Additional statewide and regional forecasts are available at:
http://www.qualityinfo.org/olmisj/PubReader?itemid=00003217

These latest OED publications highlight the danger of basing plans and inventories on obsolete forecasts:

- OED predicts that statewide, "**Manufacturing** will likely rebound but **is not expected to return to its employment level prior to the recent recession**."[3] (emphasis added). Within the region, it is predicted to grow by only 1%.[4]

In contrast, the obsolete forecast that forms the basis for the job projections in the *EOA* result in the conclusion that manufacturing jobs in Newberg will grow by 31% by 2020 and 55% by 2030.[5] According to the *EOA*, over 67% of industrial job growth through 2030 is projected to be in manufacturing.[6] There is no current basis for this conclusion.

- OED predicts that regionally construction jobs will *decline* by 13%.[7]

In contrast, the obsolete forecast that forms the basis for the job projections in the *EOA* result in the conclusion that construction jobs in Newberg will grow by 47% by 2020 and 85% by 2030.[8] According to the *EOA*, over 67% of industrial job growth through 2030 is projected to be in manufacturing.[9] There is no current basis for this conclusion, either.

- Both regionally and statewide OED predicts that greatest job growth will be in the Educational and Health Services sector.

Education and Health Care, as well as Wine/Tourism are included in the list of "Targeted Business Types" in the *EOA*.[10] These sectors typically utilize far less land per employee than sectors utilizing industrial land. However, because the *EOA* does not include overall employment projection, only employment projections for industrial users, it is impossible to tell how much job growth is projected in these sectors or how much overall job growth is projected over the planning period.

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[2] See attachment 1, p. 1
[3] See attachment 1, p. 1
[4] See attachment 2, p. 2
[5] *EOA*, Table 12-12, p. 24
[6] *Ibid*
[7] See attachment 2, p. 2
[8] *EOA*, Table 12-12, p. 24
[9] *Ibid*
[10] *EOA*, Table 12-15, p. 37

The Planning Commission should recommend the preparation of updated employment projections based on the most current long-range long range employment projections from the Oregon Employment Department.

2. Industrial employment projections are based on "high" growth, not "moderate" growth.

During the Planning Commission discussion on December 10th that followed the public testimony, Commissioners Wall and Smith referenced the "Ad Hoc Committee on Newberg's Future," and their recommendations in the "Ad Hoc Committee on Newberg's Future: Report to Newberg City Council." Both Commissioners stated that the recommendations, and therefore the industrial land needs identified in the *EOA*, were based on an assumption of "moderate" growth. These statements were incorrect.

The Ad Hoc Committee recommended adoption of a "*medium*" *population* projection out of a range of three forecasts that were prepared. For industrial *employment*, however, the Ad Hoc Committee selected the *high employment* growth projection from a range of low, medium, and high scenarios:

> "Johnson-Gardner prepared future industrial land forecasts based on long-range employment forecasts by the Oregon Employment Department. The City's share of the County's projected high, medium, and low employment growth in each employment sector was converted to space needs for each employment sector. By applying a floor to area ratio, acreage requirements were estimated for each employment sector. **The Committee selected the high employment growth scenario**...(emphasis added).
>
> Table 14. Industrial Land Need

	2025	2040
Industrial	87 acres	75 acres." [11]

Moreover, projected industrial land needs in the *EOA* exceed what is needed under the "high" employment growth scenario. Under the "high" employment growth scenario in the Ad Hoc Committee Report, the city would need a total of 162 acres of industrial land through 2040; 87 acres through 2025 and an additional 75 acres through 2040.[12]

Both the Ad Hoc Committee Report and the *EOA*, however, ultimately conclude that much more acreage is needed based on the purported need for large parcels for targeted manufacturing industries. The *EOA* concludes that a total of 251 acres of industrial land are needed through 2040; 168 acres through 2025 and an additional 83 acres through 2040.[13]

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[11] Ad Hoc Committee on Newberg's Future: Report to Newberg City Council, (July 21, 2005), p. 38. (see attachment 3.)
[12] Ibid
[13] *EOA*, pp. 43-44.

As noted above, obsolete assumptions regarding the high rate of projected industrial employment growth and the proportion of industrial employment growth in the manufacturing sector should be revised to reflect current long-range forecasts. Assumptions based on current long-range forecasts will likely result in reduced industrial land needs.

The Planning Commission should recommend the preparation of updated projections of industrial land need based on revised employment projections.

3. Intensification of uses, Redevelopment, and Infill.

On December 10th testimony was given regarding the significant amount of employment growth that is typically absorbed through intensification of existing employment uses. This job growth is accommodated on existing developed sites without new development or redevelopment.

During the staff response to testimony, Economic Planner David Beam discounted the potential for job growth to be accommodated without physical development or redevelopment occurring, based on his observation that there are very few vacant industrial properties in Newberg. Those comments overlook the reality of how and where significant job creation occurs and how it is accommodated.

In the real world many new jobs are created without land being developed or redeveloped: a processing plant or manufacturer adds staff or even a second shift; laid-off workers are recalled; a restaurant adds additional staff in the dining room and kitchen. None of these involve development or redevelopment of new or existing sites.

In addition, we disagree with Mr. Beam's observation regarding vacant industrial properties in Newberg. Earlier on December 10th, Suntron announced its closure. Suntron was Newberg's second largest industrial employer in 2009.[14] An industrial building that formerly accommodated 220 employees will be vacant and available. 220 employees represent more than 15% of all new industrial employment projected in the *EOA* through 2030.

Significant numbers of new jobs are absorbed through intensification of existing employment land uses, and through infill and redevelopment. Metro found that, "On average, 40 percent of all job growth is absorbed through redevelopment or infill."[15] In Springfield's draft EOA (EcoNorthwest, September 2009), "Springfield concludes that 52% of employment growth would not require vacant employment land." [16]

The text of Newberg's draft *EOA* recognizes this dynamic and states that:

> Table 12-18… also includes assumptions that most (55%) of Newberg's future industrial employment will be located on sites 10 acres or less, and that one-third of those future new industrial firms under 10 acres in size, and one-

[14] *EOA*, Table 12-10, p. 22
[15] Metro Report, September 1999, Urban Growth Report Update" p.51
[16] "Draft: Springfield Economkc Opportunites Analysis," (EcoNorthwest, September 2009), pp. viii-ix. See attachment 4

> half of firms under 2 acres in size, will find a site through infill redevelopment or intensification of existing employment land uses. (*EOA*, p. 43)

Despite this text, the calculations of land need apparently fail to include these stated assumptions. Table 12-12 shows industrial employment projections. 1,446 new jobs are projected between 2010 and 2030. Table 12-18 allocates a need for buildable land to *all* of these new jobs. There is no indication that *any* jobs have been allocated to infill, redevelopment, or intensification of existing employment land uses.

In addition, it is not clear why the stated assumptions limit refill potential to sites smaller than 10 acres. At least some job growth will also be absorbed through intensification of existing employment uses on larger sites.

The Planning Commission should direct staff to return with a corrected land need calculation that incorporates stated assumptions regarding infill, redevelopment, and intensification of existing employment uses, and should recommend that similar assumption be made for sites larger than 10 acres.

4. Sites for expansion of existing industries are an advantage not a disadvantage.

Testimony we submitted on December 10th points out that in its list of comparative *disadvantages*, the *EOA* states:

> **"Comparative Disadvantages**...
>
> 2) In 2009, Newberg lacks suitable industrial sites to meet needs of targeted employment opportunities...
>
> c. Some existing sites are being reserved for future expansion of adjoining industrial users." [17] (emphasis in original)

We also pointed out that the expansion of existing industrial users is a key component of Newberg's economic strategy and they are a key component of the city's targeted industry clusters. Therefore, we argued, the availability of land for their expansion is an advantage, not a disadvantage and they should be considered accordingly.

During the Planning Commission discussion on December 10th that followed the public testimony, Commissioner Smith stated that our statement was inaccurate, since the land in question was included in the inventory of vacant land.

Mr. Smith apparently misunderstood our testimony. We did not state, nor did we mean to imply, that the land in question had not been inventoried correctly.

We testified that having land available for the future expansion of adjoining existing industrial users, which are among Newberg's targeted employment opportunities, should be

[17] *EOA*, p. 27

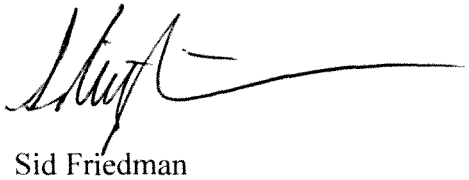
considered advantageous, not disadvantageous. We continue to believe that is true and we stand by our previous testimony.

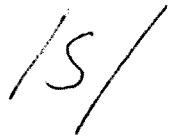
5. Conclusion

We recognize the considerable work that Newberg has undertaken in producing the Draft *Economic Opportunities Analysis* and the thoughtful manner in which the Planning Commission is considering it. Additional work remains and it is our hope that the final product is one we can support.

We hope these comments are helpful in achieving that outcome. Please include them in the official record of these proceedings and notify us of any decisions and/or future hearings in this matter.

Sincerely,





Sid Friedman
1000 Friends of Oregon

Ilsa Perse
Friends of Yamhill County

Cc (electronic): DLCD
Yamhill County Planning Department
Oregon Department of Agriculture

Attachments:
1. Article from Oregon Employment Department website, http://www.qualityinfo.org/olmisj/ArticleReader?itemid=00006783

2. Employment Projections By Industry and Occupation, 2008-2018, Region 3 (Marion, Polk and Yamhill Counties), Oregon Employment Department, November 2009

3. Ad Hoc Committee on Newberg's Future: Report to Newberg City Council, July 21, 2005, p. 38

4. Draft: Springfield Economkc Opportunites Analysis," (EcoNorthwest, September 2009), pp. viii-ix

SHARE

Health Care Projected to Lead Employment Growth

by Nick Beleiciks

Published Nov-23-2009

Summary

- Oregon is expected to add over 160,000 jobs between 2008 and 2018, an increase of 9 percent. Growth will be roughly equal to job growth in the prior decade when the state added nearly 165,000 jobs and grew by 10 percent.

- Two broad industries are expected to account for nearly half of the state's job growth:
  - Educational and health services, and
  - Trade, transportation, and utilities

- Manufacturing will likely rebound over the forecast period but is not expected to return to its employment level prior to the recent recession. Most of the sector's job losses will be in the manufacturing of durable goods, rather than in nondurable goods manufacturing.

- Job growth is expected to be most rapid in the central and southern regions of the state, while the slowest growing regions are anticipated to be in the northeast corner of the state. The Portland metro area and the Willamette Valley are expected to add the majority of jobs over the forecast period.

Predicting the future of the economy is always a difficult task. Predicting the future of an economy during times of rapid change, like a recession, is especially challenging. Every two years, Oregon Employment Department economists take on this challenge and create 10-year industry employment forecasts. We examined historical trends and other people's forecasts to help project Oregon's employment changes between 2008 and 2018. These forecasts are used in conjunction with occupational forecasts to help students decide on careers, schools decide on training programs, businesses decide on strategic plans, and governments decide on budgets and services.

After losing jobs in the years following the recession of 2001, the state experienced rapid employment growth from 2004 through 2007. In 2008, the base year for our employment projections, the state lost jobs and continued to lose jobs into 2009. Our 10-year projections do not try to forecast the beginning or end of the current recession or possible future recessions. Rather, the projections aim for a long-term average employment level, somewhere between the cyclical highs and lows.

Despite the job losses caused by the recent recession, Oregon will almost certainly add jobs between 2008 and 2018. Our forecast calls for a gain of over 160,000 jobs, an increase of 9 percent. This percentage is similar to the 10 percent gain from 1998 to 2008 but lower than any 10-year gains seen in the prior quarter-century. The projection's slow job growth reflects recent job losses caused by the recession and a population forecast that has Oregon growing slower than it has since the early 1990s.

Broad Industry Trends

We expect most broad industry sectors to add jobs between 2008 and 2018 (Table 1). However, a few industries have been hit especially hard by the recession and employment levels may take most of the decade to recover. Manufacturing is the only broad industry expected to lose jobs over the decade. We expect nearly all of the durable goods manufacturing sectors to lose jobs. The nondurable goods sector will likely also lose jobs, as losses in the paper manufacturing sector outweigh increases in food manufacturing.

Construction and information will most likely grow at a slow pace from 2008 and add very few jobs. After losing thousands of jobs during the recession, construction will likely return to its historical share of about 5 percent of total employment. Information is a diverse industry, with losses in the traditional print industries being offset by job gains in software publishing and data hosting services.

The education and health services industry is expected to add nearly 50,000 jobs, the most of any industry. Private education and health services employment is expected to grow by 23 percent over the decade, two and a half times the growth rate of total employment. Health care will add the bulk of the new jobs due to the state's growing and aging population. Oregon's population age 65 or older could grow by about 45 percent through 2018. Educational services are expected to grow at about the same rate as the overall economy.

Professional and business services will likely be another fast growing industry and is projected to grow by 14 percent and add 27,600 jobs. Growth in this industry has been driven in recent years by growth in Oregon's economy and as more firms hire other businesses to provide support activities.

Leisure and hospitality is expected to add 21,500 jobs over the decade for a growth rate of 12 percent. The largest component of this sector is food services and drinking places which are projected to grow along with the population growth rate of 12 percent and add 15,700 jobs. The smaller arts, entertainment, and recreation component is expected to grow slightly faster at 14 percent and add 3,200 jobs.

Trade, transportation, and utilities should grow about 9 percent over the decade, the same rate we project total jobs to grow. This is the largest sector in Oregon's economy and it will likely add 30,900 jobs, the second largest addition of any industry. Retail trade makes up the bulk of this sector and will add almost 20,000 jobs and grow 10 percent, slightly below the rate of population growth. The slower growth in retail trade is due to a slowing trend in the number of motor vehicle dealers, building materials stores, and hobby, book, and music stores.

The government sector should add almost 25,000 jobs, an increase of 8 percent. Federal government will likely see declining employment in Oregon due to reductions in Postal Service employment and the completion of cleanup at the Umatilla Army Depot. Tribal employment is expected to grow 14 percent as casinos expand and tribes diversify into other areas of the economy. In general, state and local governments are likely to grow at close to the pace of the state's overall economy. State and local education is expected to grow at a slower rate, consistent with the latest population forecasts that indicate Oregon's school age population will grow at a much slower rate than the total population.

Table 1

Oregon: Employment Forecast by Broad Industry, 2008-2018

Broad Industry	2008	2018	Change	Percent Change
Total payroll employment	1,765,900	1,926,200	160,300	9%
Education and health services	219,500	269,300	49,800	23%
Professional and business services	197,100	224,700	27,600	14%
Leisure and hospitality	173,100	194,600	21,500	12%
Trade, transportation, and utilities	336,400	367,300	30,900	9%
Government	296,000	319,800	23,800	8%
Other services	60,500	65,400	4,900	8%
Financial activities	101,300	105,100	3,800	4%
Natural Resources and mining	56,200	57,900	1,700	3%
Information	36,100	37,000	900	2%
Construction	94,300	95,000	700	1%
Manufacturing	195,400	190,100	-5,300	-3%

Detailed Industry Forecasts

Top 10 Growth Industries

Employment forecasts by detailed industry are needed to guide job seekers and educators in their prioritization efforts. The top 10 detailed industries by the number of jobs they will gain between 2008 and 2018 are shown in Graph 1. The top 10 industries consist of all the health care and social assistance industries, as well as restaurants, stores, and other service industries.

Ambulatory health care services, which includes doctors and dentist offices, tops the list with an expected job gain of 18,600 jobs, an increase of 28 percent. Add in projected job gains of 11,800 at hospitals, 10,500 at nursing and residential care facilities, and 6,300 in social assistance, and the total 47,200 jobs account for over one-fourth of the state's forecasted job

growth. Again, the growth in the health care and social assistance industries will be driven by the state's growing and aging population.

Food services and drinking places will likely grow 12 percent during the decade, about the same rate as population growth, and add 15,700 jobs. Limited-service eating places, which will add 7,600 jobs, are expected to have more growth than full-service restaurants, which will add 6,900 jobs.

Professional and technical services are expected to add 14,700 jobs during the decade. This industry covers firms providing a wide range of services, including many that require workers earning high wages. Firms in this industry include offices of lawyers, certified public accountants, tax preparers, architects, engineers, photographers, veterinarians, graphic designers, and interior designers, to name the most common examples.

Administrative and support services, a group of firms providing workers and support to other businesses, is expected to add 9,600 jobs. Local government education, food and beverage stores, and general merchandise stores are, like the industries mentioned above, large industries with growth driven by the increasing population.

Rapid Growth Industries

As noted above, the health care and social assistance industries - ambulatory health care, nursing and residential care, hospitals, and social assistance - are among the industries expected to add the largest number of jobs. They also top the list of industries with the largest percentage gains (Graph 2). As with the health care industry, professional and technical services' job gains also mean a fast growth rate.

Electronic markets and agents and brokers will likely be the fastest growing smaller industry between 2008 and 2018, growing 20 percent and adding 2,600 jobs. This industry has seen rapid job growth in the last few years and will likely continue to grow. These firms arrange the sale of goods owned by others through means such as business-to-business electronic markets or agents and brokers who usually work on a fee or commission basis.

The amusement, gambling, and recreation industry was one of the fastest growing industries over the prior decade, growing over 33 percent. That growth rate is not expected to continue into the next decade, but the industry should still grow about 14 percent. The factors behind the industry's growth include general population growth and retiring baby boomers with more time for recreation.

Tribal government is another area that has seen rapid growth during the prior decade and will continue into the next. This includes growth not only at casinos but also elsewhere as tribes continue to diversify into different business lines.

Nonstore and miscellaneous store retailers are expected to grow slightly faster than the average for all retailers as they fill niches not being met by traditional retailers.

Declining Industries

Although the average job growth rate in Oregon is expected to be a little slow from 2008 to 2018, most industries will likely add jobs over the decade. Other industries, especially in manufacturing, which relies more on exports than serving a growing local population, are expected to have employment losses over the decade.

Paper manufacturing is expected to lose 1,200 jobs, which represents a 20-percent loss, the most of any industry (Graph 3). This industry has been cutting jobs for years, and some major facility closures have been announced recently.

Computer and electronic product manufacturing is expected to lose 1,000 jobs, about 800 of those in the semiconductor and electronic component manufacturing industry. The loss of the "traditional" semiconductor manufacturing jobs in this industry is actually expected to be higher, but those losses should be partially offset with gains in jobs at solar cell manufacturers.

Primary metal, machinery, wood product, and transportation equipment manufacturing industries are all part of the larger manufacturing sector which has experienced a number of permanent factory closures.

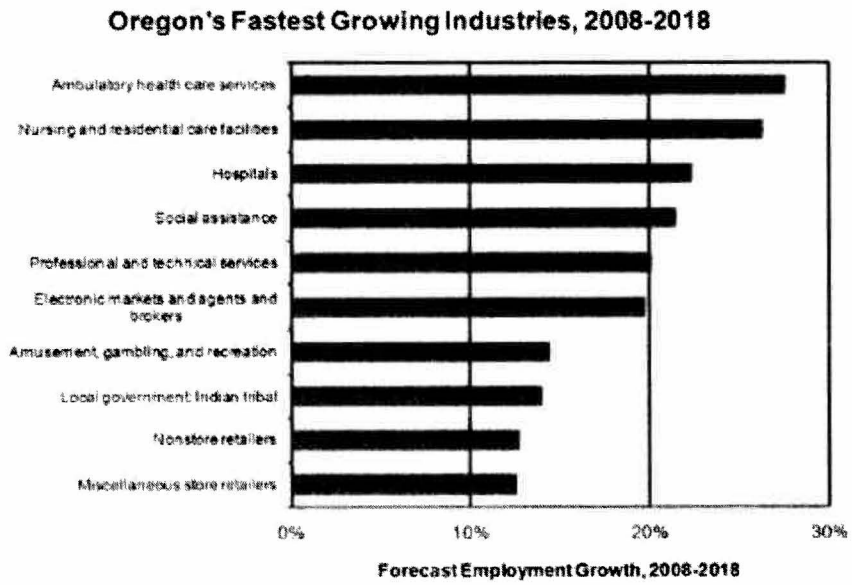
As mentioned above, the federal government is expected to lose jobs as the Umatilla Army Depot chemical incinerator closes and because of falling demand for postal services.

The non-Internet publishing industries will likely lose 400 jobs, as consumers continue the switch to online sources of information. Logging is expected to also lose about 400 jobs as more forestry work is done with labor saving tools like helicopters or by firms working in other industries.

Graph 1

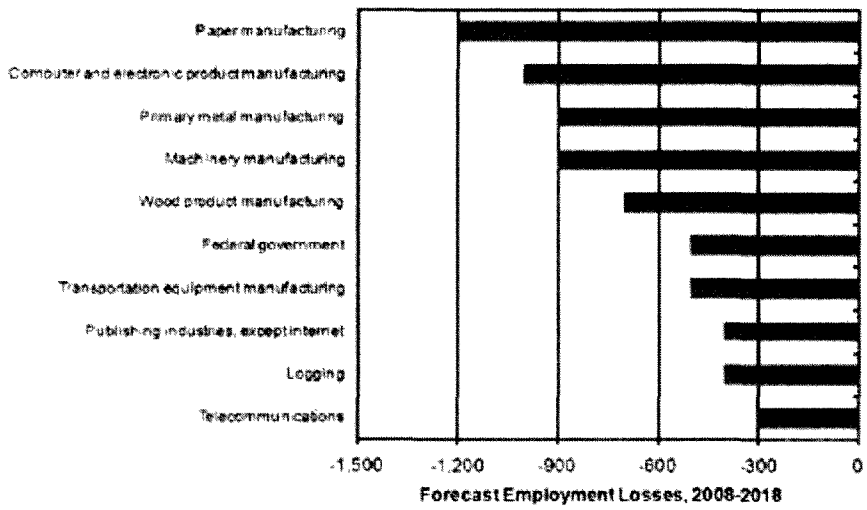
Oregon's Industries Adding Most Jobs, 2008-2018
Ambulatory health care services
Food services and drinking places
Professional and technical services
Hospitals
Nursing and residential care facilities
Administrative and support services
Social assistance
Local government education
Food and beverage stores
General merchandise stores
0
5,000
10,000
15,000
20,000
Forecast Employment Growth, 2008-2018

Graph 2


Oregon's Fastest Growing Industries, 2008-2018
Ambulatory health care services
Nursing and residential care facilities
Hospitals
Social assistance
Professional and technical services
Electronic markets and agents and brokers
Amusement, gambling, and recreation
Local government Indian tribal
Nonstore retailers
Miscellaneous store retailers
0%
10%
20%
30%
Forecast Employment Growth, 2008-2018

Graph 3

Oregon's Industries Losing Jobs, 2008-2018



Where the Jobs Are: Regional Differences

The forecast shows some regions within Oregon adding jobs at a much faster pace than other regions from 2008 to 2018 (Table 2). We expect the most rapid growth in Central Oregon (Region 10). This region has been growing partially because of its many recreational amenities, which will continue to attract people throughout the decade. Jobs in the region are expected to grow by 14 percent.

The state's other major population centers all have expected job growth rates of 10 percent, just above the statewide average. These centers include Portland (regions 2 and 15), Eugene (Region 5), Salem (Region 3), and Medford (Region 8). About half of the state's job growth will be in the Portland area.

Many of the more rural regions in the state will see smaller growth rates, as they have in recent years as natural resource and manufacturing jobs have been lost. Region 12 (Morrow and Umatilla counties) will have the smallest growth rate as the job losses that will occur when the chemical incineration work is completed offset the job gains in other local industries.

The full projections are available on www.QualityInfo.org. Select a region from the map and look in the Publications tab for Regional Projections by Industry and Occupation 2008-2018.

Table 2

Oregon: Industry Employment Forecasts by Region, 2008-2018

Workforce Region	Counties	2008	2018	Change	Percent Change
10	Crook, Deschutes, and Jefferson	81,280	92,340	11,060	14%
8	Jackson and Josephine	108,570	119,790	11,220	10%
11	Klamath and Lake	26,820	29,470	2,650	10%
5	Lane	154,400	169,400	15,000	10%
3	Marion, Polk, and Yamhill	197,300	216,400	19,100	10%
15	Clackamas	152,380	167,020	14,640	10%
2	Multnomah and Washington	712,300	780,500	68,200	10%
9	Gilliam, Hood River, Sherman, Wasco, and Wheeler	25,740	28,190	2,450	10%
1	Clatsop, Columbia, and Tillamook	37,740	41,130	3,390	9%
4	Benton, Lincoln, and Linn	103,390	111,540	8,150	8%
7	Coos and Curry	30,020	32,240	2,220	7%
14	Grant, Harney, and Malheur	18,390	19,740	1,350	7%
6	Douglas	38,130	40,560	2,430	6%
13	Baker, Union, and Wallowa	18,820	19,980	1,160	6%
12	Morrow and Umatilla	35,530	37,470	1,940	5%

WORKSOURCE OREGON
EMPLOYMENT DEPARTMENT

EMPLOYMENT PROJECTIONS BY INDUSTRY AND OCCUPATION 2008-2018 Region 3 (Marion, Polk, and Yamhill Counties)

For questions regarding industry projections, contact Nick Beleiciks at Nick.J.Beleiciks@state.or.us, (503) 947-1267

For questions regarding occupational projections, contact Brenda Turner at Brenda.P.Turner@state.or.us, (503) 947-1233

Oregon Employment Department
Workforce and Economic Research
875 Union St. NE
Salem, OR 97311
www.WorkingInOregon.org
www.QualityInfo.org

November 2009

Region 3: Industry Employment Forecast, 2008-2018
Marion, Polk, and Yamhill Counties

	2008	2018	Change	% Change
Total payroll employment	197,300	216,400	19,100	10%
Total private	150,700	166,800	16,100	11%
Natural resources and mining	16,300	17,000	700	4%
Mining and logging	1,500	1,300	-200	-13%
Construction	10,800	10,900	100	1%
Manufacturing	20,500	20,700	200	1%
Durable goods	10,900	10,900	0	0%
Wood product manufacturing	3,000	2,700	-300	-10%
Nondurable goods	9,600	9,800	200	2%
Food manufacturing	5,600	5,900	300	5%
Trade, transportation, and utilities	30,100	33,100	3,000	10%
Wholesale trade	4,600	4,900	300	7%
Retail trade	21,000	23,400	2,400	11%
Transportation, warehousing, and utilities	4,500	4,800	300	7%
Information	1,700	1,600	-100	-6%
Financial activities	8,900	9,500	600	7%
Professional and business services	14,300	16,400	2,100	15%
Administrative and support services	7,300	8,200	900	12%
Educational and health services	26,400	33,200	6,800	26%
Health care and social assistance	21,300	27,600	6,300	30%
Health care	17,900	23,400	5,500	31%
Leisure and hospitality	15,300	17,500	2,200	14%
Accommodation and food services	13,700	15,500	1,800	13%
Accommodation	900	1,200	300	33%
Food services and drinking places	12,700	14,300	1,600	13%
Other services	6,400	6,900	500	8%
Government	46,600	49,600	3,000	6%
Federal government	2,100	2,000	-100	-5%
State government	21,400	22,900	1,500	7%
State education	1,600	1,600	0	0%
Local government	23,100	24,700	1,600	7%
Indian tribal	2,000	2,100	100	5%
Local education	13,200	13,700	500	4%

F. Industrial Land Need and Supply

Need

Johnson-Gardner prepared future industrial land forecasts based on long-range employment forecasts by the Oregon Employment Department. The City's share of the County's projected high, medium, and low employment growth in each employment sector was converted to space needs for each employment sector. By applying a floor to area ratio, acreage requirements were estimated for each employment sector. The Committee selected the high employment growth scenario, which they felt was both more realistic and more desirable, since it reflects Newberg's desire to bring more family-wage jobs to the area and to avoid becoming a bedroom community.

Table 14. Industrial Land Need

	2025	2040
Industrial	87 acres	75 acres

Source: Johnson Gardner

In addition to an overall supply of buildable land, Newberg needs to have sites available the meet the specific needs of potential industrial users, so-called "target industries". The required site and building characteristics for industries that potentially could locate or expand in Newberg can be inferred from regional and local employment trends. As such, a variety of parcel sizes, building types, and land use designations are required to attract target industries.

As envisioned by Statewide Planning Goal 9 (Economy of the State),[10] cities typically look at regional, state and national trends to determine the types of economic development they want to attract. Different types of industrial development have varying siting requirements. The industrial site needs and suitability criteria are based on comparably sized and located communities. These cities include Dallas, McMinnville, Sherwood, Tualatin, Wilsonville and Woodburn. The suitability criteria also consider target industries identified by the Portland Development Commission (PDC) in coordination with the Regional Development Partnership. During the time that the Committee was meeting, Newberg officially adopted the Regional Partners Strategy, which promotes a coordinated regional approach to economic development. Finally, interviews were conducted with local and regional economic development interests to refine the types of industries Newberg is likely to attract.

OAR 660-009-0025 (2) requires cities to designate sufficient land in each site category to accommodate, at a minimum, the projected land needs for each category during the 20-year planning period. In general, there are four types of site classifications for industries:

[10] OAR 660-009-0025 (1) requires communities to identify the approximate number and acreage of sites needed to accommodate industrial and commercial uses to implement plan policies. This determination depends, in part, on plan policies and the City's economic development strategy. Those determinations will be made in the future when the City takes up the issue of economic development strategies and policies. OAR 660-009-0025 (1) also indicates that the need for sites should be specified in several broad "site categories", (e.g., light industrial, heavy industrial, commercial office, commercial retail, highway commercial) that combine compatible uses with similar site requirements. The rules do not require cities to provide a different type of site for each industrial or commercial use that may locate in the planning area.

(3) **Topography.** The sites should be relatively flat, with not more than 15% slope; with sites that are ideally less than 5% slope.

(4) **Access to services.** City services should be accessible to the site, including street access, sanitary sewer, and municipal water. Other services to sites should include: electricity, phone, and high-speed telecommunications. Capacity and demand for these services will vary by uses on each site.

(5) **Land ownership.** Sites with a single owner are strongly preferred, to reduce the cost of land assembly.

IMPLICATIONS

The economic opportunities analysis has the following implications for Springfield's economic land needs.

- *Economic growth.* Decision makers and community members that participated in the economic opportunities analysis agreed that economic growth is desirable over the planning period. The employment forecast indicates Springfield will add 13,440 new employees between 2010 and 2030 using the OAR 660-024-0040(8)(a)(ii) safe harbor methodology. The economic opportunities analysis concludes that Springfield will have employment growth in a wide variety of businesses, from services and retail for residents to industrial development to medical services. The City wants to diversify its economy and attract higher wage and professional jobs.

- *Buildable lands.* Springfield has 3,415 acres currently designated for industrial and other employment use. About two-thirds of the land designated for employment within Springfield's UGB is considered developed land that is not expected to redevelop over the 20 year planning period. Less than 15% of this land is buildable, unconstrained land. The majority of buildable, unconstrained employment land in Springfield has existing development on it that is expected to redevelop over the planning period. Springfield has a lack of buildable large sites, with one buildable site 20 acres and larger and 23 buildable sites in the five to 20 acre size range.

- *Employment that will not require vacant land.* Springfield concludes that 52% of employment growth would not require vacant

employment land.[1] Springfield's assumptions about employment that will not require vacant land are as follows:

- Fourteen percent of employment (1,918 employees) will locate in non-employment designations. These employees will include people with home occupations, working from home, and businesses that locate in residential or other non-employment designations. This assumption is based on the percent of employment located in non-employment designations in 2006. See Appendix C and Table C-7 for more information about this assumption.
- Ten percent of new employment (1,344 employees) will locate in existing built space. See Appendix C and Table C-7 for more information about this assumption.
- Twenty-seven percent of new employment (3,669 employees) will locate on redevelopable sites. Table 5-1 shows that Springfield assumes 187 industrial sites and 340 commercial and mixed use sites will redevelop over the planning period. The estimate of employment on these sites was based on the average number of employees per site by site size in 2006. See Chapter 2 for more information about redevelopment assumptions.

- *Redevelopment potential.* The analysis of redevelopment potential and need for employment land assumes that Springfield will have substantial redevelopment over the planning period. Consistent with City Council policies, the areas that are expected to have the most redevelopment in the plan period are in Glenwood, especially along the Willamette Riverfront and Franklin/McVay corridor, and in the Downtown Urban Renewal District. All land deficiencies for sites smaller than five acres are expected to be addressed through redevelopment of existing sites. The majority of retail land needs are expected to be addressed through redevelopment.

  The City will need to make strategic investments that support redevelopment and to continue supporting redevelopment through City plans and policies. For example, the City has established urban renewal districts in Glenwood and Downtown to help finance the public improvements necessary to support redevelopment and is

[1] The estimate of 52% of new employment not requiring vacant land is based on the assumption that 1,918 employees will locate in non-employment designations, 1,344 employees will locate in existing built space, and 3,669 employees will locate on redevelopable sites. The total number of new employees not requiring new land is 6,931 employees, which is approximately 52% of the forecasted growth of 13,440 jobs.

PLANNING COMMISSION MINUTES
December 10, 2009
7 p.m. Regular Meeting
Newberg Public Safety Building
401 E. Third Street

TO BE APPROVED AT THE JAN. 14, 2010 PLANNING COMMISSION MEETING

I. ROLL CALL:

Present:	Lon Wall, Chair	Derek Duff	Thomas Barnes
	Nick Tri, Vice Chair	Matson Haug	Philip Smith
	Cathy Stuhr	Amanda Golson, student PC	

Staff Present: David Beam, Economic Development Planner
Steve Olson, Associate Planner
Jessica Nunley, Assistant Planner
Dawn Karen Bevill, Recording Secretary

Others Present:	Sid Friedman	Lee Does	Saj Jivanjee	Ken Wegler
	Robert & Dorothy Roholt		Maryann Tack	Craig Markham

II. OPEN MEETING:

Chair Wall opened the meeting at 7:00 p.m. and asked for roll call.

III. CONSENT CALENDAR:

Chair Wall entertained a motion to accept the minutes of the November 12, 2009 meeting.

MOTION #1: Haug/Duff to approve the minutes from the Planning Commission Meeting of November 12, 2009. (7Yes/ 0 No/) Motion carried.

IV. COMMUNICATIONS FROM THE FLOOR:

Chair Wall offered an opportunity for non-agenda items to be brought forth. No topics were brought forward.

V. LEGISLATIVE PUBLIC HEARING:

APPLICANT: City of Newberg
REQUEST: Consider revisions to Newberg's Economic Opportunities Analysis (EOA). The EOA revisions include updated buildable land inventories for commercial and industrial land, updated demographic and economic statistics, updated information regarding Newberg's economic development strategy, and updates to the Comprehensive Plan land need and supply tables.
FILE NO.: CPTA4-09-001 RESOLUTION NO.: 2009-275
CRITERIA: Newberg Development Code §151.122(B)

Opening of the Hearing:
Chair Wall opened the public hearing and asked the Commissioners for any abstentions, conflicts of interest, and objections to jurisdiction. None were brought forward. Jessica Nunley, Assistant Planner, presented the staff report and revised Economic Opportunities Analysis (EOA) (see official meeting packet for full report). David Beam, Economic Development Planner, referred to the PowerPoint and spoke in regard to implementing the EOA. Mr. Beam has been with the City for over 10 years and knows many businesses have wanted to locate here but have not been able to because Newberg was unable to supply property of the appropriate size or with suitable characteristics. In order to have a balanced community, these have to be offered.

Commissioner Haug believes it is important to deliberate on the pros and cons. He referred to page 40 of the meeting packet in regard to comparative advantages and stated the attractive rural setting listed in that section is not near what it was years ago. Newberg no longer has a small town quality of life or proximity to the metro Portland area because Newberg has no mass transit into surrounding areas. He challenges the findings on these advantages. Mr. Haug asked staff what specific businesses were not able to locate in Newberg. Also, he asked if staff has put out an honest effort to unify the diverse parcel owners between Newberg and Dundee so that area would be easier to develop. Jessica Nunley replied the Economic Opportunities Analysis includes site suitability criteria and the area between Newberg and Dundee does not meet those criteria for industrial development. Access is limited and serviceability of utilities is an issue. David Beam stated one good example of a business unable to expand in Newberg was a medical device startup company that developed a heart medical device. They ran out of space because they needed to expand to begin production.

Public Testimony:
Chair Wall opened the public testimony portion of the hearing and asked those testifying to limit their comments to five minutes.

Undecided:
Saj Jivanjee is an architect and urban planner. He was disappointed after reading the Comprehensive Plan since he has seen this same plan tried in other cities. He believes the City is missing opportunities. He believes many issues are not addressed and old principles are being used. Why destroy land that has been around for thousands of years for more development? The key is to protect the natural resources in Newberg. Commissioner Haug stated the Comprehensive Plan is a guide for the implementation for the City Ordinances on Planning and Development. What are the priority needs for land development in Newberg that would differ from the existing or proposed wording in this plan? Mr. Jivanjee replied the priority is a design process; natural resources are left alone, which leaves the remaining balance of land for development. Commissioner Haug stated it was the developers and homeowners who wanted development and prevented putting in appropriate widths on stream corridors, as an example. Mr. Jivanjee stated the price for a piece of land can be affected by the zoning. Natural resources need to be protected before rezoning, or the land will be considered too valuable to be left undeveloped. Commissioner Stuhr stated the State Land Use Planning Goals compartmentalize the issues and try to protect natural resources while allowing development. The plans and analysis have been done but seem to fall apart where they all come together and you truly judge the pros and cons of trading the growth of the City for natural resources. Commissioner Smith understands Mr. Jivanjee is saying Newberg should start from scratch and determine ahead of time what the land uses are and what is sacred so development wouldn't overcome them. He then asked for examples. Mr. Jivanjee replied one top priority was not giving up lands with good agricultural soil. Assuming that is not enough, in his opinion, perhaps you

would also protect land that has scenic views, is agriculturally useful, has vegetative corridors, or has significant forests. There needs to be an overall policy to protect lands.

Opponents:
Maryann Tack has lived in Newberg since 1992, is a chiropractor, and has a degree in education. She is concerned with the loss of farmland and how it will affect the area in the future.

Dorothy Roholt addressed the Economic Analysis Plan and the Southeast Industrial Park. She believes the plan is moving along too quickly and is not what the citizens expect to see within the community. Mrs. Roholt is also concerned with statements referring to the advantages to economic development in this area. In reading the plan, there are tables that indicate wages and education levels that are not accurate as to what is spoken to in the text. Page 15 in the original document regarding the workforce and highly skilled jobs, alludes to a workforce that prefers work in the industrial field which she does not believe is true. Some of the tables in the plan fail to show the great potential in the healthcare industry in Newberg, which already has land. She believes this plan is rather rushed and not put together professionally. There are too many inconsistent facts and unprofessional wording. Also, the whole idea of developing flat land is an easy way to rush and fix the problem. Commissioner Stuhr asked for her thoughts on target industries and clusters as an approach. Mrs. Roholt replied regions tend to develop their own clusters and are known by the clusters that succeed. The wine industry is working well and could be developed further. Healthcare could also be a target cluster. Commissioner Stuhr pointed out the information in the plan was obtained from many different resources, which may be the reason why the tables classify industries differently. Commissioner Smith stated the plan does discuss the healthcare industry as one of four primary clusters, and does show that healthcare has available land for future growth. Industrial land is the problem and is needed for employers who offer industrial jobs. He urged Mrs. Roholt to consider the possibility that this plan has not been rushed into and has been done as a thorough job under State guidelines for protection of agricultural land.

Robert Roholt is an environmental engineer. He submitted written testimony to the City today. Newberg has doubled since 1989; the uncontrolled growth is a concern. Mr. and Mrs. Roholt have attended many meetings, but the concept that bigger is better is not true. There is a major transportation problem in this area and Newberg will have even more if large industry comes in. Chair Wall stated he has fought against rapid growth in Newberg but at the same time cities such as Tualatin, Sherwood, Hillsboro, and Gresham have all had faster rates of growth. The Ad Hoc Committee that was appointed by the Mayor came up with moderate numbers for Newberg's growth and this is the commercial part of that program. There has to be compromise. There is currently 12% unemployment in Oregon and Newberg's is worse than the State's average. He wants to be sure citizens in town have jobs.

Commissioner Haug stated the presentation emphasizes the pros and cons and those have to constantly be reviewed and discussed. This plan is suggesting the only way to get adequate job growth is with large parcels and the argument he has heard tonight is there are other places to look to help with job growth. Regarding increased traffic, one reason is because Newberg has no mass transit or light rail and transportation issues have a lot to do with that.

Lee Does stated the growth in Sherwood and Tualatin is not to be envied. Mr. Does and his wife moved here six years ago. He works in Tualatin for a company that employs 50 people and makes million-dollar equipment. He urged the Planning Commission to be careful about bringing in large employers. People who live here may not necessarily be hired in the new industries when they come in. Mr. Does and his wife specifically chose Newberg for small town life and they like what they currently see when they look

out their windows. If you have to put a price on an eagle or a sunset, no one will pay it. If SP Newsprint closes tomorrow, how will someone be able to move in there if you're already selling shovel ready property? Mr. Does is against the tenor of the Economic Opportunities Analysis as it appears. It is a turnkey approach. Local businesses are struggling and there is nothing to be gained right now by promoting shovel ready properties while companies are laying off employees by the hundreds. He does not see a great economic turnaround for another decade. Newberg should seek to invest in key and targeted industries listed in the Economic Opportunities Analysis. Mr. Does pointed out the Economic Opportunities Analysis fails to quote the latest data but figures from 2004. Why push for more land when the economy is in recession? Newberg has untapped potential for tourism; what is lacking is marketing. Mr. Does also submitted written testimony.

Chair Wall recessed the meeting at 9:05 p.m. for a five-minute break.

TIME - 9:10 PM

Continuation of Opponent's Testimony:
Sid Friedman testified on behalf of 1000 Friends of Oregon and Friends of Yamhill County. These organizations support Newberg's efforts to plan for the future and to strengthen the local economy and it's evident that considerable work has gone into the analysis. However, they do have a number of concerns. The draft overestimates the amount of employment land Newberg will need and underestimates the capacity of available land within the existing urban growth boundary to accommodate those needs. A more compact urban growth boundary would reduce pressure on farmland and rural lands outside the current urban growth boundary, reducing the cost of infrastructure beyond the fringe of existing development, and would also reduce transportation costs for Newberg residents who work and shop in Newberg and protect the local food shed. The City should plan to use land more efficiently in the future than it has in the past. Newberg based its calculations regarding how much new land is needed for new industrial development based on 9 ½ jobs per acre because it found it consistent with existing industrial development in Newberg. Salem and McMinnville used a denser jobs per acre figure. This is especially important since Newberg plans to accommodate a lot of its need for new industrial land on prime farmland, which already supports Yamhill County's leading industry, agriculture. Once land is committed to urbanization people disinvest in farming. The same amount of industrial building that Newberg is planning can be sited on less land then what is planned for in the Southeast Industrial Area. The employment projections are based on outdated, pre-recession forecasts and should be updated based on current long-range employment forecasts for the State of Oregon. The Economic Opportunities Analysis labels the South Industrial Area as a special opportunity because it's a nearby expanse of large, flat farmland; however, this land is prime farmland, zoned for exclusive farm use, and is not within the urban growth boundary or the urban reserve area. The organizations he represents do not characterize prime farmland as a special opportunity or comparative advantage. Mr. Friedman also submitted written testimony.

Ken Wegler submitted written testimony as late correspondence. Mr. Wegler was born in Newberg and has ancestry in Newberg dating back to 1848. He is concerned with the Economic Opportunities Analysis due to finding an error on the PDF file page 22 that shows FMC Food Tech as employing 109 employees. FMC sold out two years ago to PPM which merged with a company from England last year. This mistake makes him question the rest of the analysis. Mr. Wegler then referred to a report dated November 30, 2009 from the Chehalem Chamber of Commerce that stated money was allocated for Phase I of the bypass. When looking at the Economic Opportunities Analysis, which he read in detail, it fails to mention the wildlife around Newberg or how it would be protected from development. Mr.

Wegler also informed the Planning Commission that Suntron, which employs approximately192 people, announced they will be closing in Newberg which will make available a large space for another employer. Mr. Wegler submitted written testimony and a map.

Craig Markham worked for the Oregon Department of Transportation. He submitted written testimony on the comment form. He noted himself as a proponent, opponent, and undecided. Mr. Markham also submitted aerial photographs of southeast Newberg for the record. Mr. Markham has lived here for 20 years and agrees with the prior testimony he has heard this evening. His hope is to have the quality of Newberg improved rather than the quantity. He is concerned with the bypass and is afraid for the community and integrity of Newberg. From his experience, he has seen growth explode when large highways are developed in an area.

Chair Wall closed public testimony at 9:45 PM.

Chair Wall asked for final comments from staff. Jessica Nunley pointed out the timeline in the Economic Opportunities Analysis is 20 – 30 years out. It is important to keep in mind that Newberg is planning for the future and implementation of the goals and strategies for the citizens of Newberg. Staff has heard repeatedly from citizens the value of live here, work here, shop here. In order to implement that value, planners need to prepare for a complete community that provides those things. Otherwise, Newberg runs the risk of becoming a bedroom community. In addition, as Newberg looks to the future of problems associated with not providing local jobs, traffic congestion and commuting will add pollution. Newberg would like to provide more highly skilled industrial jobs. The statistics in the Economic Opportunities Analysis are based on current census data, and data from the Oregon Employment Department. As seen in recent meetings, Newberg is not promoting smoke stack type industries but to provide a more professional industry that looks nice and is functional. The transportation network will have to be reviewed when the UGB expansion is considered. There is a State Transportation Rule that requires a look at transportation flow, impacts, and mitigation. Ms. Nunley also pointed out this is an Economic Opportunities Analysis; this is not the urban growth boundary findings. The South Industrial Area does appear to be the best place for growth, but will be required by the state to do a location analysis at the urban growth boundary stage to find the best area to meet the industrial land need.

Ms. Nunley stated Section 4, letter B on page 74 of the Comprehensive Plan Amendments needs to be removed; the resolution has been updated to reflect this.

Commissioner Smith asked if the City does move forward and the land is approved for development, what is the earliest a company could build a factory. David Beam said that if Newberg is able to satisfy the State regarding the need for this land, he believes the building process couldn't begin until 2013.

Jessica Nunley stated staff has received late correspondence for the Planning Commission regarding this topic. Two letters were received tonight; one is dated December. 9, 2009, and was received today; the other was received on December 8, 2009.

TIME – 10:05 PM

Deliberation:

MOTION #2: Haug/Smith moved to review the 4 additional written testimonies/late correspondence and then continue deliberation. (7 Yes/ 0 No) Motion carried.

Jessica Nunley and David Beam passed out the late correspondence for the commissioners to read.

TIME – 10:14 PM

Commissioner Smith asked staff about Sid Friedman's letter and the point he made in calculating the land needed for industrial growth. The letter said the Economic Opportunities Analysis does not make appropriate estimates of the use of current land that we have. One example is the land we all presume A-DEC will expand into, which is already available and zoned for industry. This vacant land will be used by one of Newberg's existing industrial users, which is part of one of our targeted clusters. In similar ways, Mr. Friedman states in his letter that the numbers are flawed as well as the acres needed because the report is not adequately calculating the number of industrial jobs that can be created on land that Newberg already has. David Beam replied there are three kinds of lands: green fields, existing facilities, and lands to be redeveloped. As seen on the map Jessica Nunley showed during the PowerPoint presentation, there is very little green field available to develop on and most of it has already been targeted for other uses. The vacancy rate for the existing facilities is extremely low, of course now with Suntron vacating there will be a big piece to fill. Redevelopment of lands is not economically feasible at this time due to the facilities being in good shape. Commissioner Smith asked if the calculations in the Economic Opportunities Analysis account for a certain percentage of these jobs being absorbed by the expansion onto the two sections of land; one near the airport and the other in the Springbrook area? Mr. Beam replied yes, they are calculated in as part of the job growth.

Chair Wall entertained a motion for Resolution 2009-275.

MOTION #3: Tri/Smith moved to approve Resolution 2009-275. No vote was taken on the motion.

Discussion:
Commissioner Haug stated the EOA is a document with momentum. The objections heard this evening are primarily due to the usage of the green fields in the southeast industrial area. He will not deny there are strong arguments in favor of this resolution, but arguments have been heard tonight regarding insufficient effort was put into analyzing the economical alternatives of small acreage and expansion of existing business clusters. Also, large employers and complexes will not resolve existing employment problems for the current residents. Another point more in line with analysis of alternatives was marketing of existing resources and business clusters, such as tourism. Another argument made was Newberg is in an economic downturn and adoption should be delayed since there is no urgency for it. Also, the news of Suntron closing will open up another area for operation of a business. Commissioner Haug thinks this resolution should be delayed until that analysis is completed and staff returns with information on the points he's mentioned.

MOTION #4: Haug/Thomas moved to amend the motion that adopts Resolution 2009-275; delaying the vote on adoption until after the alternative analysis is done for the Southeast Industrial Plan and further analysis by staff on the economic alternatives for smaller acreage for industrial development with expansion of business clusters. No vote was taken on the motion.

MOTION #5: Smith/Tri moved to table the discussion on Resolution 2009-275 until the January 14, 2010 Planning Commission Meeting. (7 Yes/ 0 No) Motion carried.

TIME – 10:35 PM

VI. NUAMC POSITION RECOMMENDATION:

Mayor Andrews has requested that the Planning Commission make a recommendation on which commissioner should be appointed to Newberg Urban Area Management Committee. Commissioner Haug has been reappointed to the Planning Commission and will serve on the NUAMC committee unless another Planning Commissioner is interested.

MOTION #6: Haug/Smith moved to recommend Commissioner Lon Wall for the Newberg Urban Area Management Committee position; Commissioner Thomas Barnes as the Alternate. (7 Yes/ o No) Motion carried.

MOTION #7: Haug/Stuhr moved to continue Resolution 2009-273 until the January 14, 2010 Planning Commission Meeting. (7 Yes/ 0 No) Motion carried.

MOTION #8: Haug Stuhr moved to continue Resolution 2009-274 until the January 14, 2010 Planning Commission Meeting. (7 Yes/ 0 No) Motion carried.

VIII. ITEMS FROM STAFF:

Update on Council items: Steve Olson stated the Animal Shelter Annexation will be going to City Council on December 21, 2009.

The Holiday Dinner will take place on December 14, 6:30 p.m. at the Yamhill Grill.

Other reports, letters, or correspondence: None.

The next Planning Commission Meeting is scheduled for January 14, 2010

IX. ITEMS FROM COMMISSIONERS: None.

X. ADJOURN:

Chair Wall adjourned the meeting at 10:52 p.m.

Approved by the Planning Commission this 14th day of January, 2010.

AYES: 6 **NO:** Ø **ABSENT:** 1 (List Name(s)) (TRI) **ABSTAIN:** Ø (List Name(s))

Dawn Karen Bevill
Planning Recording Secretary

Philip D Smith
Planning Commission Chair

PLANNING COMMISSION MEETING
ROLL CALL & MOTIONS RECORDING FORM - 2009

DATE: December 10, 2009
LOCATION: Newberg Public Safety Building or _____

✔	ATTENDANCE	November 12, 09 Minutes Approval	Review additional testimony (written) & Continue deliberations	Approve Resolution 2009-275	Amend to delay adoption after further research.	Table Discussion until Jan. 14, 2010 meeting
✓	BARNES, THOMAS	Y	Y			Y
✓	HAUG, MATSON	Y	Y			Y
✓	DUFF, DEREK	Y	Y			Y
✓	SMITH, PHILIP	Y	Y			Y
✓	STUHR, CATHY	Y	Y			Y
✓	TRI, NICK – **VICE CHAIR**	Y	Y			Y
✓	WALL, LON -- **CHAIR**	Y	Y			Y
✓	GOLSON, AMANDA **STUDENT PC**					
RESOLUTION #:			2009-275	2009-275	2009-275	2009-275
COMMISSIONER THAT MOTIONED: (1ST & 2ND)		Haug/ Duff	Haug/ Smith	Tri/ Smith	Haug/ Thomas	Smith/ Tri
VOTE ON MOTION:		Motion Carried	Motion Carried	No Vote	NO Vote	Motion Carried
CONDITIONS:						

STAFF PRESENT:

No - ☐ **Barton Brierley, Planning Director**
☒ **Jessica Nunley, Assistant Planner**
☒ **Steve Olson, Association Planner**
☒ **David Beam, Econ. Dev. Coordinator/Planner**
☐ **Luke Pelz, Assistant Planner**
☐ David King, Recording Secretary
☒ Dawn Karen Bevill, Recording Secretary
☐ Crystal Kelley, Recording Secretary

OTHER CITY PERSONNEL PRESENT:

☐ _____
☐ _____
☐ _____

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PLANNING COMMISSION MEETING
ROLL CALL & MOTIONS RECORDING FORM - 2009

DATE: December 10, 2009
LOCATION: Newberg Public Safety Building or _____

✔	ATTENDANCE	MOTIONS: Minutes Approval	Lon Wall to NuAMC Position and Thomas Barnes as alternate	Continue Resolution 2009-273	Continue Resolution 2009-274	
	BARNES, THOMAS		Y	Y	Y	
	HAUG, MATSON		Y	Y	Y	
	DUFF, DEREK		Y	Y	Y	
	SMITH, PHILIP		Y	Y	Y	
	STUHR, CATHY		Y	Y	Y	
	TRI, NICK – **VICE CHAIR**		Y	Y	Y	
	WALL, LON -- **CHAIR**		Y	Y	Y	
	GOLSON, AMANDA **STUDENT PC**					
RESOLUTION #:				2009-273	2009-274	
COMMISSIONER THAT MOTIONED: (1ST & 2ND)			Haug/ Smith	Haug/ Stuhr	Haug/ Stuhr	
VOTE ON MOTION:			Motion Carried.	Motion Carried.	Motion Carried.	
CONDITIONS:						

STAFF PRESENT:

- ☐ **Barton Brierley, Planning Director**
- ☒ **Jessica Nunley, Assistant Planner**
- ☒ **Steve Olson, Association Planner**
- ☒ **David Beam, Econ. Dev. Coordinator/Planner**
- ☐ **Luke Pelz, Assistant Planner**
- ☐ David King, Recording Secretary
- ☐ Dawn Karen Bevill, Recording Secretary
- ☐ Crystal Kelley, Recording Secretary

OTHER CITY PERSONNEL PRESENT:

☐ _____

☐ _____

☐ _____

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Planning Division
P.O. Box 970 ▪ 414 E First Street ▪ Newberg, Oregon 97132
503-537-1240 ▪ Fax 503-537-1272 ▪ www.ci.newberg.or.us

Planning Commission Staff Report
Revised Economic Opportunities Analysis

File No.: CPTA4-09-001
Proposal: Adopt the revised Economic Opportunities Analysis and the accompanying Comprehensive Plan Amendments.

Planning Commission Hearing Date: December 10, 2009

Summary of Proposal: The original Economic Opportunities Analysis (EOA) was adopted by City Council in January 2006 by Ordinance 2006-2635. The EOA is considered part of the Comprehensive Plan and implements the goals and policies in Section H. The Economy. Much of the information found in the EOA is statistical and dynamic in nature, including demographic and economic statistics, population and employment projections, and buildable land inventories. Therefore, the EOA is not a static document and is meant to be updated with current information from time to time. The accompanying Comprehensive Plan amendments update similar statistical information and add five new policies to Section H. Having an updated EOA also ensures the city's compliance with Statewide Planning Goal 9: Economic Development.

Summary of EOA: Newberg's economic base has diversified over time and several of its home-grown industries have become national and international leaders in their respective fields. The City is slowly transitioning into more of an urban center for east Yamhill County as the population grows. However, Newberg citizens have made it clear that they value the "live here, work here, shop here" values and way of life. To keep up the City's commitment to the values of its residents, Newberg must strengthen its economic base and provide adequate industrial and commercial lands for current and future populations. The revised EOA has updated data on demographic and economic statistics to help us plan for these future populations.

Newberg has identified four business clusters that are the foundation of its economy: manufacturing, health care, higher education, and the wine/tourism industry. Ensuring the vitality of these business clusters is key to the economic health of our community. Newberg's economic development efforts focus on two principal strategies: 1) retention and expansion of existing businesses, and 2) recruitment of new businesses. The availability of developable land for businesses is a large part of Newberg's economic development strategy, and the City closely monitors the inventory of available land to ensure that there are opportunities for economic growth. The revised EOA has updated data on regional industry clusters and trends, an assessment of our community economic development potential, and an updated discussion of Newberg's economic development strategy.

The industrial and commercial buildable land supply tables in the revised EOA indicate a shortage of both types of land within the current Newberg Urban Growth Boundary. It is critical for economic development efforts to have adequate buildable land available that meets the identified site suitability requirements for both industrial and commercial areas. The City cannot help provide enough jobs for current and future residents without adequate land to locate new businesses on, and without adequate land for existing businesses to expand onto. Newberg does have many advantages that make it stand out in the regional marketplace, including the following: small town quality of life; access to quality education and skills training; strong established and growing industry clusters; strong local support for business and employment opportunities; proximity to the Portland Metropolitan Region; future Newberg-Dundee Bypass; and compliance with Oregon's statewide planning goals. The revised EOA includes updated buildable lands inventories and an updated discussion of Newberg's comparative advantages and disadvantages, along with strategies to address each.

Summary of Changes to the EOA:

- Updated population, demographic, economic and employment statistics.
- An economic trends analysis section that looks at national, state and regional trends, regional economic development industry clusters and target industries, Yamhill County agri-business, and regional industrial land availability.
- A new section that covers an assessment of our community economic development potential. This section includes updated employment projects, a discussion of Newberg's comparative advantages and disadvantages relative to similar regional markets, and Newberg's special opportunities to capitalize on its unique geographic niche in the regional marketplace.
- A more robust discussion of Newberg's economic development strategy. The current EOA focuses largely on regional targeted industry clusters; the revised version of the EOA focuses more on our local targeted industry clusters as the foundation of our economic development efforts. This section also includes actions to capitalize on Newberg's comparative advantages and to address the comparative disadvantages, and actions to implement the overall economic development strategy.
- Updated buildable land inventories and the addition of maps that illustrate the available industrial and commercial buildable land by area.

ATTACHMENTS:

Planning Commission Resolution 2009-275 with:

Exhibit A: Revised Economic Opportunities Analysis
Exhibit B: Comprehensive Plan Amendments
Exhibit C: Findings

1. Letter from Tom Fox, dated December 1, 2009
2. Comments from Steve Oulman, dated November 30, 2009
3. Public Comments

Revised Economic Opportunities Analysis

PLANNING COMMISSION HEARING
RESOLUTION 2005-275
DECEMBER 10, 2009

Staff Request

Pass Resolution 2009-275, recommending that the City Council adopt the revised Economic Opportunities Analysis and the accompanying Comprehensive Plan Amendments.

Background of the EOA

- Original EOA was adopted by City Council in 2006
- EOA is considered part of the Comprehensive Plan and implements the goals & policies in Section H (The Economy)
- Having an updated EOA ensures continued compliance with Statewide Planning Goal 9: Economic Development

Summary of EOA

- Demographic & economic statistics help us plan for future populations
- Targeted industries: manufacturing, health care, higher education, wine/tourism
- Assessment of community's economic development potential to retain & attract targeted industries
- Employment land inventories (industrial & commercial)

Summary of EOA Revisions

- Updated population, demographic, economic & employment statistics
- Economic trends analysis (national, state & regional)
- Assessment of community economic development potential
  - Employment projections
  - Comparative advantages & disadvantages
  - Special opportunities in the regional marketplace
- Economic development strategy
- Updated buildable land inventories & maps

Comparative Advantages & Disadvantages

Advantages:

- Small town quality of life
- Access to quality education and skills training
- Established and growing industry clusters
- Strong local support for business & employment opportunities
- Proximity to the Portland Metropolitan region
- Future Newberg-Dundee Bypass
- Oregon's statewide planning goals

Disadvantages

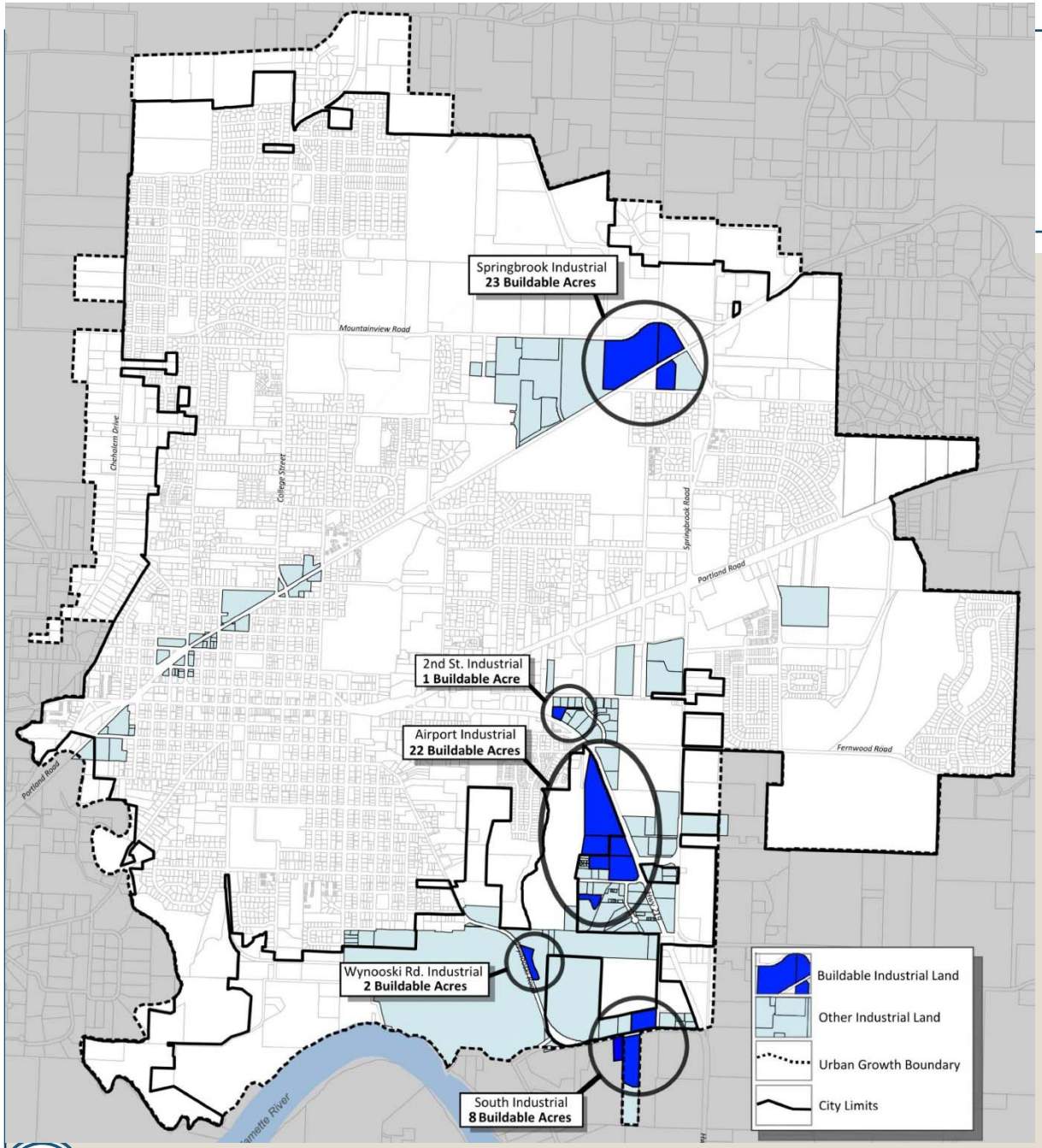
- Transportation & access issues
- Lack of suitable employment sites
- Highly parcelized land outside UGB limits ability to meet employment site requirements
- Stressed commercial sector
- Retail dollar leakage due to close proximity to metropolitan area markets
- Market pressures on SP newsprint
- Oregon's statewide planning goals

2010-2030 Industrial Buildable Land Supply and Need Table

Size Range (Acres)	Number of Sites - 2009 UGB	Buildable Acres - 2009 UGB	2010-2030 Needed Sites	2010-2030 Needed Buildable Acres	2010-2030 Deficit # of Sites	2010-2030 Deficit Buildable Acres
<2	5	6	18	21	(14)	(15)
2 to 10	7	30	11	63	(4)	(33)
10 to 30	1	20	2	42	(1)	(22)
30 to 50	0	0	1	42	(1)	(42)
Total	13	56	32	168	(20)	(112)

- Unmet need for one 30-50 acre site, two 10-30 acre sites, 33 acres of 2-10 acre sites, and 16 acres of sites under 2 acres in size.

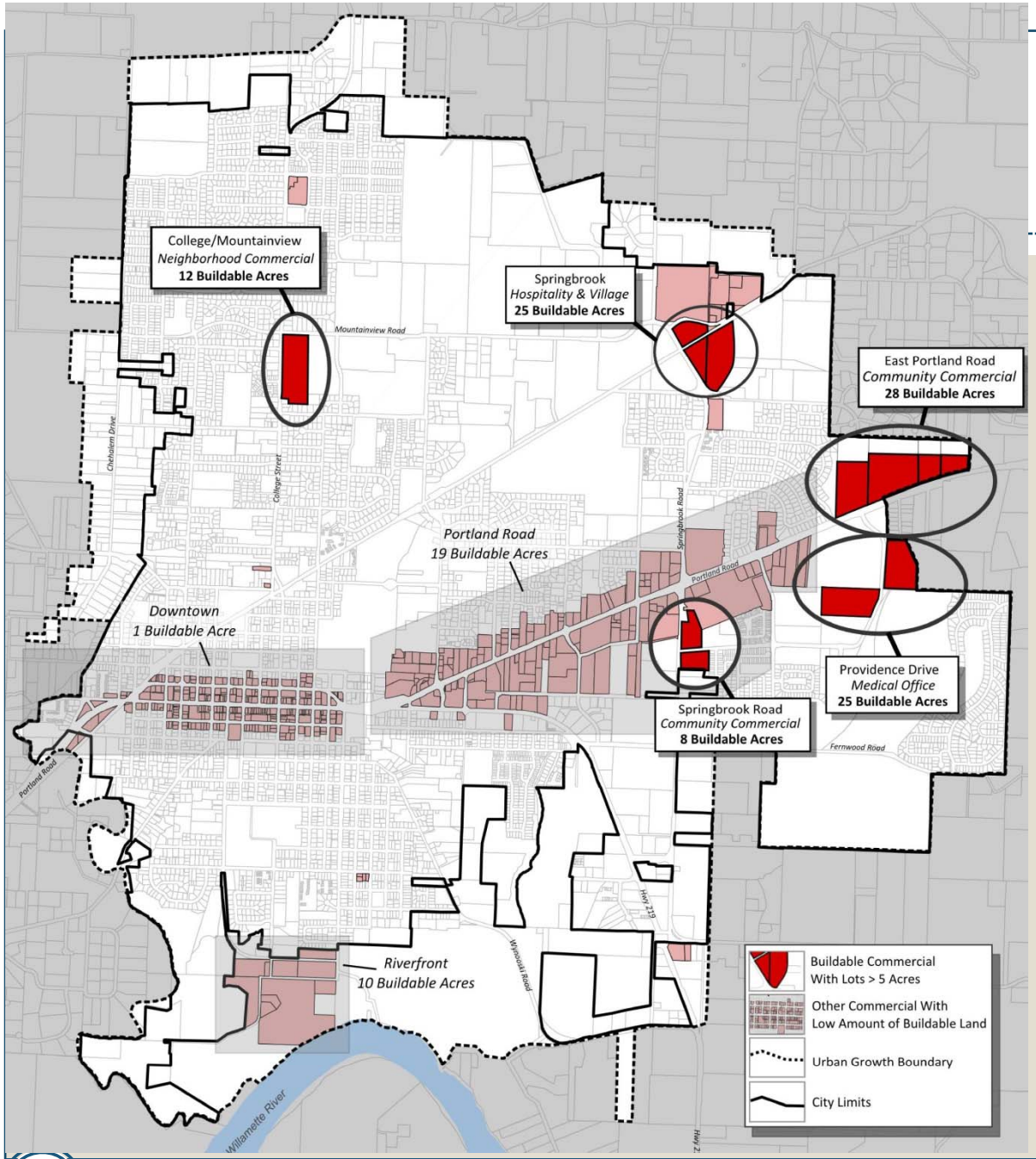
Current Buildable Industrial Land Map



2010-2030 Commercial Buildable Land Supply and Need Table (acres)

Type	2010-2030	Land in 2009 UGB	Surplus or (Deficit)	2031-2040
Office	**20**	25	5	**17**
Retail	**101**	95	(6)	**51**
Total	**121**	120	(1)	**68**

- Nearly adequate supply of commercial land through 2030.
- Need 68 buildable acres for 2031-2040. Some commercial development will be made up by downtown redevelopment & infill; remainder should include a community commercial center and 2-3 neighborhood commercial centers.



Current Buildable Commercial Land Map

Comprehensive Plan Amendments

- Necessary as the Comprehensive Plan coordinates information with the EOA
- Updated population information & land need and supply information
- Add five new policies to Section H (The Economy):
  - Three policies regarding collaboration for the best utility, telecommunications, and transportation infrastructure possible (m, n, o)
  - p. The City shall strive to develop and promote a high quality of life in the community in order to attract and retain a diverse and highly skilled workforce.
  - q. The City shall foster an environment of business innovation so that the community may remain economically competitive.

Economic Development Strategy

- Two-pronged approach:
  - Retention and expansion of existing businesses
  - Recruitment of new businesses
- Strategies & actions to capitalize on comparative advantages and address comparative disadvantages
  - Implement Comprehensive Plan policies from Section H (The Economy)
- Regional collaboration
- Focus on local targeted industry clusters: manufacturing, health care, higher education, wine/tourism
- Other supportive actions that implement Comprehensive Plan policies from Section H (The Economy)

In Practice...Implementing the EOA

- Anecdotal evidence
- Implementing two-pronged approach
  - 80/20 rule
  - Regional cooperation & collaboration
- Marketing our comparative advantages (i.e. easy I-5 access)
- Coordination & buy-in by OBDD

Questions?

Any questions about the revised EOA or the Comprehensive Plan amendments?

business oregon

David Beam, AICP
City of Newberg
Economic Development Planner
414 E. First Street
Newberg, OR 97132

December 1, 2009

David:

I have reviewed the site descriptions by targeted industry cluster (Tables 16 -19 of Newberg's draft Economic Opportunity Analysis). I concur that site sizes and characteristics would be viable for firms seeking sites in Oregon and for Newberg's targeted industries.

Given Newberg's location and current economic base, the City should be able to find success in expanding and attracting businesses of the identified targeted industry clusters, if development sites of the size and character identified in the EOA are made available.

Tom Fox
Business Development Officer
Business Oregon
Oregon Business Development Department

775 Summer St, NE, Suite 200 • Salem, OR 97301-1280
503-986-0123 • fax 503-581-5115 • TTY 800-735-2900 • www.oregon4biz.com

Jessica Nunley

From: Oulman, Steve [steve.oulman@state.or.us]
Sent: Monday, November 30, 2009 1:51 PM
To: Barton Brierley
Cc: Jessica Nunley; Hogue, Thomas
Subject: Newberg EOA - local file CPTA4-09-001

Barton –

After a brief conversation with Jessica this morning, I reviewed the revised economic opportunities analysis (EOA) sent to us on November 25. It appears that this revised document reflects items you and I talked about on November 19. As such, I don't anticipate that the department will have further comments on this post-acknowledgement plan amendment.

In the revised EOA, staff revised discussion of transportation opportunities and constraints, strengthened and clarified the economic development actions and strategies the city will undertake, clarified that land needs are counted as "gross" acres, and refined the analysis of industrial and commercial land needs for the 20-year planning period as well as an additional need to the year 2040.

We understand that this EOA will provide significant basis for a forthcoming urban growth boundary expansion. Such a proposal likely will be reviewed by the department and LCDC in the manner of periodic review and LCDC may review the EOA plan amendment in the context of evaluating goal compliance of a UGB proposal.

Steven M. Oulman, AICP | Regional Representative, Mid-Willamette Valley
Oregon Department of Land Conservation and Development
635 Capitol Street NE, Suite 150 | Salem, OR 97301-2540
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Economic Opportunity Analysis

Adopted by Newberg City Council – 1/3/06
Ordinance No. 2006-2635

City of Newberg
Economic Opportunity Analysis

Introduction

Newberg's economy has traditionally been rural in nature. As the city with the second largest population in Yamhill County, Newberg serves as the commerce center for the eastern portion of the county's primarily agricultural economy. However, over the past couple of decades, Newberg has been making a slow transition to a city of more urban characteristics. Newberg's economic base has become more diversified, including some of its home-grown industries that have evolved into national and international leaders in their respective fields. This trend toward urbanization is likely to continue as the growth of the Portland metropolitan area increasingly influences the character of Newberg . However, our city is one steeped in history, and is a community that possesses a strong sense of place. The citizens of Newberg highly value these characteristics and wish to maintain its unique identity. To do so, Newberg must strengthen its economic base. Newberg must support its existing businesses while nurturing new enterprises. Finally, Newberg also recognizes the importance of regionalism in economic development. Therefore, it will take advantage of the Portland area regional economy while retaining its separate identity.

Population Profile

Historic and Future Growth Trend

Newberg has grown steadily through the last few decades (Source: U.S. Census Bureau).

Year	Population
1960	4,204
1970	6,507
1980	10,394
1990	13,086
2000	18,064

Newberg's population as of July 1, 2004 has been estimated to be 19,910 (Source: Population Research Center, Portland State University).

Between 1990 and 2000, Newberg's growth rate was 38%. In comparison, Newberg's growth rate was greater than the Portland Metropolitan area's at 27%,the state of Oregon at 20%, and Yamhill County's at 30% (Source: U.S. Census Bureau). It should be noted that Yamhill County, where Newberg is located, is part of the Portland Metropolitan Statistical Area (PMSA). While Oregon's population in general is not expected to grow in the foreseeable future as fast as in the 1990s, the Portland metropolitan area should

grow faster than the state as a whole.

In 2004, the Newberg City Council appointed an ad hoc advisory committee to look at the community's future land needs. To accomplish this task, the Ad Hoc Committee for Newberg's Future needed to forecast the community's future population. A consultant working with the Committee developed three growth forecast scenarios for the Committee to consider: low, medium, and high. The Committee selected the medium growth scenario as the most likely to occur. The following is the forecasted future growth for Newberg:

	2000	2005	2025	2040
Forecasted Population*	18,438	21,132	38,352	54,097

Source: Johnson Gardner, Population Research Center, Portland State University
* Population forecasted within Newberg's urban growth boundary.

Age characteristics

The following table compares the population of Newberg by age compared with the state of Oregon, Yamhill County and the PMSA (2000 Census):

TABLE 12-1

Age	Newberg		Oregon		PMSA		Yamhill County	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Under 5	1,442	8.0	223,055	6.5	134,890	7.0	5,911	7.0
5 to 9	1,389	7.7	234,474	6.9	138,228	7.3	6,321	7.4
10 to 14	1,353	7.5	242,098	7.1	136,190	7.1	6,618	7.8
15 to 19	1,651	9.1	244,427	7.1	130,638	6.8	7,149	8.4
20 to 24	1,875	10.4	230,406	6.7	127,455	6.6	6,578	7.7
25 to 34	2,623	14.5	470,695	13.8	298,031	15.5	11,006	12.9
35 to 44	2,763	15.3	526,574	15.4	317,251	16.5	13,254	15.6
45 to 54	2,035	11.3	507,155	14.8	283,431	14.8	11,422	13.4
55 to 59	608	3.4	173,008	5.1	90,811	4.7	3,939	4.5
60 to 64	413	2.3	131,380	3.8	62,850	3.3	2,820	3.3
65 to 74	789	4.4	219,342	6.4	97,404	5.1	4,909	5.8
75 to 84	749	4.1	161,404	4.7	73,909	3.9	3,705	4.4
85+	374	2.1	57,431	1.7	26,921	1.4	1,363	1.6
TOTAL	18,064	100.0	3,421,399	100.0	1,918,009	100.0	84,992	100.0

The median age of Newberg's population compared with the state of Oregon, Yamhill County and the PMSA is as follows (2000 Census):

	Newberg	Oregon	PMSA	Yamhill County
Median Age	30.1	36.3	34.8	34.1

This data shows that our population is younger that the comparative populations, especially in the 20 to 24 year old category. This is likely due to the presence of students attending George Fox University. In general, our population over 45 years of age is somewhat lower that the comparative populations.

Education Attainment, Employment, and Income

The following table compares the educational attainment of the Newberg population over 25 years of age compared with the state of Oregon, Yamhill County and the PMSA (2000 U.S. Census):

TABLE 12-2

Educational Attainment	Newberg		Oregon		PMSA		Yamhill County	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than 9th Grade	654	6.3	111,705	5.0	54,049	4.3	3,348	6.4
9th to 12th, no diploma	1,219	11.7	223,106	9.9	106,173	8.5	5,716	10.9
High school graduate (includes equivalency)	2,889	27.8	591,229	26.3	298,927	23.8	16,235	30.8
Some college, no degree	2,791	26.8	610,753	27.1	346,179	27.6	13,752	26.1
Associates degree	688	6.6	149,639	6.6	86,800	6.9	2,737	5.2
Bachelor's degree	1,397	13.4	369,252	16.4	241,038	19.2	7,042	13.4
Graduate or professional degree	761	7.3	195,314	8.7	120,548	9.6	3,815	7.2
TOTAL	10,399	100.0	2,250,998	100.0	1,253,714	100.0	52,645	100.0

The following table compares the household income levels of the Newberg population over 25 years of age compared with the state of Oregon, Yamhill County and the PMSA (2000 Census):

TABLE 12-3

Household Income	Newberg		Oregon		PMSA		Yamhill County	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than $10,000	312	5.1	115,129	8.6	49,990	6.7	2,010	7.0
$10,000 to $14,999	355	5.8	86,695	6.5	37,119	5.0	1,609	5.6
$15,000 to $24,999	872	14.3	179,053	13.4	82,937	11.2	3,326	11.6
$25,000 to $34,999	893	14.6	185,595	13.9	93,693	12.6	3,937	13.7
$35,000 to $49,999	1,003	16.4	236,282	17.7	129,840	17.5	5,446	19.0
$50,000 to $74,999	1,797	29.5	269,492	20.2	163,756	22.1	6,844	23.8
$75,000 to $99,999	564	9.2	129,488	9.7	87,796	11.8	2,964	10.3
$100,000 to $149,999	212	3.5	87,218	6.5	64,298	8.7	1,780	6.2
$150,000 to $199,999	79	1.3	22,650	1.7	16,735	2.3	418	1.5
$200,000 or more	14	0.2	23,507	1.8	16,217	2.2	366	1.3
TOTAL	6,101	100.0	1,335,109	100.0	742,381	100.0	28,700	100.0

	Newberg	Oregon	PMSA	Yamhill County
Median Household Income	$44,206	$40,916	$47,077	$44,111
Median wage				
Male, full-time, Year-round	$34 ,099	$36,588	$40,418	$35,686
Female, full-time, Year-round	$23,571	$26,980	$29,894	$25,254

Comparing the previous education, income, and employment tables reveals a very interesting profile of the Newberg community. The Newberg population has a smaller percentage of 4-year college and graduate degrees than the state or the PMSA. Nonetheless, the city's median household income is higher than the state's average. The reason for condition likely lies in the manufacturing data in the following tables. Newberg has a much higher percentage of its workforce in the manufacturing sector than the comparative populations. The average annual wage for the employment sector is the highest of all the employment sectors in Newberg at $48,418. Manufacturing jobs paying high wages usually are very skilled. However, those skills are more likely to be developed through vocational training and apprenticeships rather through a university education.

It is interesting to note that Newberg is the home of private university (George Fox University), yet the city's population as a whole has fewer college degrees. This indicates that George Fox University graduates are not remaining in Newberg, whether by choice to live in another community of a different quality of life and/or lack of opportunity.

The median annual wages for males and females in Newberg are less that the comparative populations. With a relatively high median household income, this may mean that there is a higher average number of wage earners in each household than in the comparative populations.

TABLE 12-4

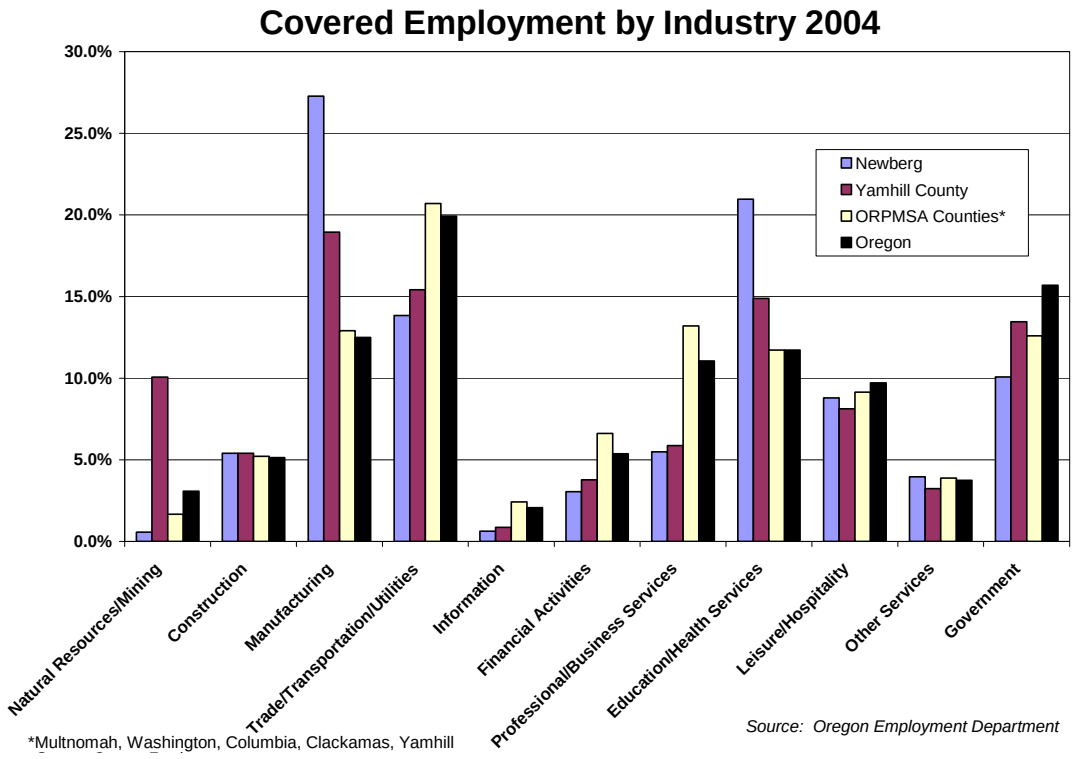


TABLE 12-5

City of Newberg Covered Employment by Industry 2004				
	Average Annual Employment	Number of Firms	Payroll $	Average Wage $
Natural Resources/Mining	46	12	1,780,765	38,434
Construction	447	83	15,749,453	35,273
Manufacturing	2,261	68	109,461,165	48,418
Trade/Transportation/Utilities	1,147	113	31,393,726	27,362
Information	52	12	1,375,115	26,530
Financial Activities	252	72	8,335,564	33,078
Professional/Bus. Services	454	79	13,969,592	30,770
Education/Health Services	1,738	84	54,587,110	31,411
Leisure and Hospitality	729	61	8,793,341	12,059
Other Services	328	64	5,484,323	16,699
Private Sector Total	7,454	648	250,930,154	33,664
State Government	8		270,409	36,055
Local Government	805		27,469,045	34,121
Federal Government	22		1,206,634	54,435
Government Total	835		28,946,088	34,666
Total	8,289		279,876,242	33,765

Source: Oregon Employment Department Covered Employment 2003

Commuting Patterns

The 2000 Census indicates that many Newberg residents are likely to be employed outside of the city. Commuting data for Newberg specifically is not available. However, Yamhill County commuting data is available. Of Yamhill County jobs, 20% of them are held by workers who reside outside of the county. Of Yamhill County residents, 35% commute to jobs outside of the county, with the vast majority of these commuting to the

Portland metro area. This data also shows an increasing percentage of Yamhill County residents commuting to other counties for employment. The following table shows this commuting pattern (Source: Oregon Employment Department):

TABLE 12-6

Yamhill County residents working in:							
	1990		**2000**		**Change: 1990 to 2000**		
	#	**Share**	**#**	**Share**	**#**	**Growth**	**Share**
Yamhill	19,396	68%	24,593	64%	5,197	27%	-5%
Clackamas	742	3%	1,575	4%	833	112%	1%
Clark	86	0%	134	0%	48	56%	0%
Columbia	27	0%	52	0%	25	93%	0%
Multnomah	1,998	7%	2,374	6%	376	19%	-1%
Washington	3,934	14%	6,653	17%	2,719	69%	3%
Elsewhere	2,230	8%	3,207	8%	977	44%	0%
Total	**28,413**	**100%**	**38,588**	**100%**	**10,175**	**36%**	

Given Newberg's relatively close proximity to the Portland area's employment centers, it is possible that the percentage of Newberg residents commuting outside of the community for work is higher that Yamhill County as a whole. The housing construction boom in Newberg in recent years in contrast to the limited commercial/industrial growth would indicate that this is the trend for Newberg. The 2000 Census also shows that the mean travel time for Newberg workers is 23.3 minutes. Given Newberg's relatively small physical size, this statistic would indicate that a good portion of Newberg workers find employment outside of the city.

Reasons for these commuting patterns are likely to be manifold:

- Lower housing costs compared to the Portland area.
- More employment opportunities in the Portland area.
- Desire to live in a community like Newberg with a high quality of life and sense of community, rather than a "same as everywhere else" type of Portland area suburb.

Historic Economy

Settlement of our region by people of European ancestry began a mostly agricultural economy for the area. As the region developed, Newberg slowly became the commercial center for the eastern end of Yamhill County and it remains so to this day. Evidence of this development is expressed through Newberg's Central Business District, which consists of many early, twentieth century buildings constructed in a high-density pattern.

The advent of the car as a primary mode of transportation for people brought about commercial development pattern of a lower density. Most of this type of development is situated along Highway 99W at the eastern section of the city.

Current Economy

Newberg has a diverse economic base. This diversity, along with the types of businesses, has provided Newberg with a reasonably stable economy. The relatively minor impact of the recession at the beginning of this century seems to attest to this.

The following is a list of the top employers located within the urban growth boundary of Newberg in 2005 (Source: Chehalem Valley Chamber of Commerce):

TABLE 12-7

Employer	Average Employment	Product description
A-dec	914	Dental equipment
George Fox University	560	Higher education
Newberg Public Schools	520	K-12 education
SP Newsprint Company	324	Newsprint
Providence Newberg Hospital	255	Health Care
Fred Meyer, Inc.	235	Groceries, pharmacy, apparel, electronics, hardware, home décor.
Suntron	190	Electronics (circuit boards, modular parts, cable assembly)
Friendsview Retirement Center	149	Continuing care retirement community
City of Newberg	140	Government
FMC Food Tech	109	Food processing machinery
Hazelden Springbrook	100	Alcohol and drug treatment facility
Safeway	80	Groceries, pharmacy
Climax Portable Machine Tools	79	Portable machine tools
A.R.E. Manufacturing	70	Dental equipment and boat parts
Chehalem Youth & Family Services	70	Child and family services
Dental Components, Inc.	60	Dental equipment
Ushio Oregon, Inc.	53	High intensity lamps
Harris Thermal Transfer Products	52	Heat exchanger manufacturing

As has already been pointed out, Newberg has a higher than average manufacturing employment base. The companies in the table above shows that many of the community's businesses are industrial in nature. Education (e.g. George Fox University) and health care (e.g. Providence Newberg Hospital) are also big components of Newberg's economic structure. In addition, the wine industry is beginning to make a larger impact, along with the associated tourism industry: Bed & Breakfasts, restaurants, art shops, wine-tasting rooms.

While Newberg's economy appears to be stable, outside threats to its health do exist. Firstly, the global economy provides strong competition for local manufacturers. Many other countries, such as China and India, are attracting manufacturing facilities through a

growing, trained workforce with lower, average wages than this region. Secondly, Newberg's commercial sector has been under considerable stress as retail paradigms have changed over the last few decades. Regional malls and the more recent development of "big-box" stores are strong competitors to Newberg businesses. While the volume sales model of these types of stores bring lower costs to consumers for goods, this pattern has had a negative impact on the relatively smaller retailers of the local economy. In addition, the ease of shopping through internet sales is being utilized by growing number of customers. Many locally-owned businesses find it difficult to compete under this new paradigm, a situation that has forced many of them to go out of business. In addition, Newberg's close proximity to the Portland metro area and relatively low retail opportunities results in retail dollar "leakage" from the community. This means that fewer retail dollars stay in the community and continue to circulate within the local population. However, there are strategies being employed to counter this situation. Many small businesses are adjusting these new retail realities by either focusing on high quality customer service and/or gearing their business plans toward niche markets.

Support for this assertion of retail dollar leakage can be demonstrated through some simple calculations. By taking the total annual retail sales numbers of area, divided by the area's population, one gets a total annual retail spending per capita in that community. Using this formula, the following is a list of the annual retail sales per capita in population centers within Oregon.

TABLE 12-8

Population Center	Annual retail sales per capita
Newberg	$9,462
McMinnville	$11,798
Ashland	$7,495
Medford	$21,470
Washington County	$12,386
Salem	$13,807
Bend	$22,933
Pendleton	$12,515
Eugene/Springfield	$14,132
Oregon	$10,542

Source: U.S. Census Bureau

Newberg's local retail spending is the below the state average. Yet, Newberg's median household income is higher than the state average. McMinnville's retail spending is higher than Newberg, but also has more shopping opportunities. Ashland and Medford's relationship is much like Newberg with the Portland metro area, with many Ashland retail dollars likely to be going to Medford businesses. Many other commercial centers around Oregon, like Salem, Bend, Pendleton and Eugene/Springfield also appear to attract more retail dollars per capita that the state average.

It is acknowledged that this calculation is simplistic. Many other variables would affect a more thorough analysis, such as total income, disposable income, geographic boundaries and population dispersion. However, it is unlikely that any of these factors would change the fact that many small towns with limited shopping opportunities, like Newberg, near larger urban centers, lose retail dollars to those urban centers.

Outside of Newberg, agriculture is still an important industry to the area's economy. The wine/tourism industry has an especially large impact upon Newberg. Many new businesses, such as restaurants, bed & breakfasts, art galleries, and gift shops, have been established with a recognition that tourists would be a principal customer. The Yamhill Valley (consisting of portions of Yamhill and Polk County) is the heart Oregon's wine industry, with about 200 vineyards and 85 of Oregon's 200 wineries. It is the heart of a $576 million Oregon industry (Source: News-Register). The wine industry in Yamhill County has grown exponentially over the last few decades.

Future Economy

Plans and Policies

Newberg has developed a vision for the community's economic future. The City of Newberg's adopted Comprehensive Plan includes a list of goal and policies that help shape Newberg's future economy (Section H. The Economy). Moreover, Newberg has recognized the importance of being part of a shared, regional economic vision. Beyond the Vision: A Strategic Plan for the Chehalem Valley is a document that was created cooperatively between five governmental entities located within the Chehalem Valley. This document was adopted by the Newberg City Council in January 2005. One section of this document called *Economy and Employment* describes the economic future of the area as follows:

> A diversified economy provides balanced economic opportunities for the residents of the Chehalem Valley. Agriculture and agribusinesses are an important component of the local economy. The natural beauty of the area encourages tourism and the wine industry. A carefully targeted retail recapture strategy has encouraged more local shopping and minimized buying outside of the area. Downtown areas are vibrant commercial areas that support the local economy.
>
> Clean industries have been developed using a "campus" design. Plenty of family wage jobs are available for citizens of the area. Tourism is a major economic force, its strengths based on the premise that the Chehalem Valley is 1) the gateway to the wine country; 2) characterized by a clean and comfortable environment; and, 3) offers the historical experience of a friendly, small town and village America in the earlier period of the 20th century. As a destination location for visitors, the community of Dundee now has two small exclusive hotels and bed and breakfast inns. The service industry has expanded, with the health industry and health research being a major provider of employment in this sector of the economy.

Key strategic steps laid out for the *Economy and Employment* section of the plan are as follows:

- Hold a broad community forum on economic development to build consensus.
- Invigorate the Chamber of Commerce Economic Development Committee.
- Seek financial aid in the form of grants.
- Develop community college training programs tailored to the labor force needs of prospective employers.

Today, the most accepted economic development model is that such an endeavor should be approached as a regional effort. Cities can no longer compete individually within the global economy. Moreover, luring companies located in other cities within the same region is now recognized as a zero-sum game.

The regional economic development paradigm is expected to continue in the foreseeable future. Most of Newberg's regional economic development efforts in the recent past have been limited to its involvement with the Mid-Willamette Valley Community Development Partnership, which is administered through the Mid-Willamette Valley Council of Government, located in Salem. Moreover, the Chehalem Valley Chamber of Commerce has been a member of the Strategic Economic Development Corporation (SEDCOR) for last 2-3 years. However, Newberg's economic future is likely to be strongly linked with fortunes of the Portland region rather than Salem region. The previously mentioned Newberg commuter data and retail shopping patterns support this assertion.

In the summer of 2004, the City of Newberg joined the Association of Regional Economic Development Partners, Inc.. The Partners is "a public-private partnership that focuses on shared economic priorities and works to implement business retention, expansion, and recruitment as well as marketing strategies and recommendations for policy development. The members are public and private sector economic development professionals in the region who have worked collaboratively for more than 10 years to retain and recruit businesses, and promote the metropolitan region as a vital economic center."

On January 3, 2005, the Newberg City Council passed Resolution No. 2005-2554, which stated the city's support for the framework of the Portland Regional Business Plan of the Regional Economic Development Partners. The complete Plan is being drafted at this time by representatives of both the public and private business sectors and is expected to be completed by the end of 2005.

Regional Economic Development Industry Clusters and Target Industries

Industry clusters of a region are its principal economic drivers. The Regional Business Plan identifies specific, traded-sector industry clusters that should be supported to enhance the economic base of the region. The Plan defines a cluster as follows:

A cluster is a group of firms that, though their interactions with each other and with their customers and suppliers, develop innovative, cutting-edge products and processes that distinguish them in the market place and from firms in the same industry found elsewhere. The competitiveness of an industry cluster is determined by the presence of highly specialized pools of skills, technology and infrastructure tailored to the needs of the cluster firms. The presence of sophisticated and demanding customers in a cluster pressures firms to innovate on a continuing basis....

Those industry clusters that compete nationally and internationally are the core of this region's economy and what distinguishes it from other regions. The industry cluster that exist and that are emerging in the metropolitan area are built on the distinctive knowledge competencies of the region, and the strengths that currently enable the region to compete globally for economic activity and investment. Additionally, industries that sell their products and services nationally and internationally have greater long-term growth potential since their opportunities for growth are not constrained by the size of this region's market. For these reasons, focusing on industry clusters is both a more efficient and effective use of this region's efforts and resources.

The Plan identifies the following industry clusters that the Portland region should focus its economic development efforts:

- <u>Established</u>
  - High Tech (Semiconductors/Silicon, Imaging & Display Technology)
  - Metals, Machinery, Transportation Equipment
  - Nursery Products
  - Specialty Foods and Food Processing
  - Lumber and Wood Products

- <u>Emerging</u>
  - High Tech (Nano & Micro Technology, Cyber-Security, Health/Medical Information Technology)
  - Creative Services (Advertising, Public Relations, Film and Video, Web/Internet Content and Design)
  - Sports Apparel/Recreation-Related Products

- <u>Targeted (clusters desired to create and establish)</u>
  - Biotech/Bioscience (Medical Devices, Bioinfomatics, Pharmaceuticals, Genomics, Anti-Virals)
  - Sustainable Industries (Renewable Energy, Resource Efficiency Technologies, Sustainable Building Materials, Green Chemistry)
  - Professional Services (Architecture, Engineering, Legal and Financial Services, etc.)
  - Distribution & Logistics

Newberg may or may not be able to capitalize on these industries in the near future. However, given our economic relationship with and close proximity to the Portland region, along with technologies like high-speed telecommunications that close the gap of space and time, it is reasonable to think that some of the businesses within these industries may find that they would like to establish themselves in Newberg. In addition, doing business in Newberg (e.g. real estate costs) can often be significantly lower than much of the Portland metro area. Our community offers a unique quality of life compared to others in the region, one that will attract those who believe their business will benefit form being located here.

Local Economic Development Industry Clusters and Target Industries

Recruiting specific new businesses to Newberg such as those listed in the Regional Business Plan should be encouraged. However, the majority of Newberg's economic development efforts should be focused upon supporting existing local businesses. In the economic development profession, there is a general principal call the "80/20 rule", which means that 80 percent of an area's economic development efforts should be dedicated towards the retention and expansion of existing local businesses. Another saying goes "Your good businesses are your competitor's best recruitment prospects!" This means that a community should ensure, as much as possible, that their local businesses are happy and prosperous, or else they may look elsewhere to do business. The point is that it is far easier, effective and efficient to try to maintain and expand your economy through one's local industries than to attract new ones.

As has been stated previously, the most effective method of strengthening the local economy is by focusing one's economic efforts on an area's strong, traded-sector clusters. In Newberg's case, this would be manufacturing, medical services, higher education, and the wine/tourist industry.

As we have seen in this report's data, the manufacturing industry is of critical importance to the local economy. One of Newberg's strongest clusters would be the dental industry, with one of its businesses being a world leader in the field. Many of the community's industrial businesses also involve a high level of metals machine work, an area that has good potential for expansion. Finally, a large, newsprint production facility is located here. This facility has received some major investments in the last few years. However, the newsprint production business is and will continue to face tough market demands in the future.

The health care industry should continue to be a strong segment in the foreseeable future. The heart of this industry is Providence Newberg Hospital, a highly-regarded facility in the field. Providence is currently constructing a new hospital on a 56 acre site that will be called Providence Newberg Medical Center. The new $68.5 million facility will provide greatly expand the capabilities of the hospital and is expected to serve not only Newberg, but the nearby region as well. Hospital physical space will almost double to 138,000 square feet and doctor office space will more than double to 37,500 square feet.

Diagnostic imaging equipment will be completely digital and state-or-the-art, helping the hospital to attract the best medical staff. Hospital employment is expected to increase by 100 to 450 and 60 other new jobs are expected to be created as a result of the expansion. The new facility is expected to be in operation in June 2006.

In addition, since 1999, two new assisted care facilities have been opened (Avamere and Astor House) and one existing facility has gone through a major expansion (Friendsview Manor). Construction on another facility called Springbrook Oaks Assisted Living Center is expected to begin in the fall of 2005.

Higher education should continue to be big part of the local economy. George Fox University (GFU) has had an increasing financial impact on Newberg, both by the new dollars it brings to the community (GFU is a private, tuition-driven institution) as well as the skills support it provides local businesses. The University has rapidly grown in the last couple of decades, with a student population expanding from 549 in 1986 to 3,210 in 2005. About 1,600 of those students attend classes at the Newberg campus, with the remainder attending satellite campuses in Portland, Salem, Redmond and Boise, Idaho. The University currently offers 35 undergraduate majors, 12 graduate programs, 5 seminary programs, and a bachelor's degree-completion program for working adults. Some of its biggest undergraduate programs include engineering (one of only 5 ABET-accredited schools in Oregon), business administration, and biology.

The University's future plans will continue to strengthen the local economy. A new nursing program will begin in the fall of 2006. With the current national shortage of qualified nurses, this program should assist the new Providence Newberg Medical Center fulfill its staffing needs. Other future expansion plans include the following:

- A 120-bed residence hall for third- and fourth-year students is under construction on the northeast side of campus. It is expected to open in fall of 2006.
- Hoover Academic Building is undergoing a two-year major renovation and expansion to provide facilities for the new nursing program.
- Purchase the 8 acre, existing Providence Newberg Hospital facility to create a new campus quad for professional and graduate programs.
- A 500-seat amphitheater is expected to be completed in the fall of 2005 on the edge of the Hess Creek canyon that runs through the campus.
- Development of a 24 acre site on the corner of Villa Road and Crestview Drive for athletic fields.

The wine/tourist industry would be considered a target industry. Tourism, of which wine industry is a big part, has shown strong growth for more than a decade. Total direct spending for tourism in Yamhill County has gone from $29.1 million in 1991 to $60.7 million in 2003 (Source: Dean Runyan Associates.) While growth of this industry surrounding Newberg has been impressive, the impact to the local economy has been limited. Some restaurants, bed and breakfasts, wine shops, and art galleries have undoubtedly have benefited from this rising industry and are actively pursuing these customers. Given Newberg's strategic location as the eastern gateway to the area's wine

country from the Portland metropolitan region, the potential for growth in this industry is very high.

Commercial and Industrial Land Needs

To encourage and accommodate future commercial and industrial growth, developable land must be readily available. Newberg's Ad Hoc Committee on Newberg's Future recently completed an analysis of the community's future land use needs. That analysis is described in the *Report to Newberg City Council; Recommendations for Newberg's Future*, which was accepted by the Newberg City Council on July 21, 2005. On August 1, 2005, the City Council initiated the amendment process for the comprehensive plan changes recommended in the Report. The following are the Committee's recommendation's in the Report describing the commercial and industrial land needs for Newberg's future.

Commercial Land Need

As Newberg grows, so will its needs for commercial land. Additional population will bring additional retail, office, and other commercial opportunities. Johnson-Gardner prepared a forecasts the need for office and retail commercial land. The office land need is a function of employment growth based on long-range forecasts by the Oregon Employment Department. The retail land need is a function of household growth and typical household spending patterns.

TABLE 12-9. Commercial Land Need

Type	2005-2025	2026-2040
Office	15 ac	27 ac
Retail	96 ac	82 ac
Total	111 ac	109 ac

Source: Johnson Gardner, *Industrial & Office Land Need Methodology*

In addition, Newberg will need to ensure that large parcels are available for shopping centers. The Urban Land Institute has identified three types of shopping centers that potentially could be developed in communities such as Newberg: neighborhood centers, community centers and regional centers. A large regional shopping center is not consistent with Newberg's desire to maintain a small town feeling and have a complete community rather than a bedroom suburb, smaller neighborhood and community shopping centers are preferred. Therefore, in addition to the overall demand for commercial land based on population and employment growth, Newberg needs to ensure that there is an adequate supply of sites with appropriate characteristics for this type of commercial development in terms of size, access, and location. Under this approach, future land needs will include needs for 2-3 community centers (10-15 acres each) and 2-3 smaller neighborhood centers (3-5 acres) for 2025 and 2040. The smaller neighborhood commercial centers should be scattered throughout the community to provide goods and services near where people live and reduce the need to drive into the

central area for basic needs.

Commercial Land Supply

The commercial buildable land inventory inside the current Newberg UGB has approximately 105 acres, but consists mostly of small, scattered sites, with only 3 parcels larger than 5 acres. Overall, Newberg has a deficit of commercial land through 2025. Appropriate land will need to be designated commercial to meet future needs, through some combination of changing the plan designation of lands within the UGB and/or adding additional land to the UGB. To meet the commercial land needs through 2040, additional land will need to be designated commercial.

TABLE 12-10. Commercial Land Need and Supply

Commerical Land Need 2005-2025 (acres)	Commercial Land in UGB (2004)	2025 Surplus (Deficit) (acres)	Commerical Land Need 2026-2040 (acres)
111	105	(6)	109

Source: Newberg's Ad Hoc Committee on Newberg's Future
Report to Newberg City Council; Recommendations for Newberg's Future

Industrial Land Need

Johnson-Gardner prepared future industrial land forecasts based on long-range employment forecasts and converted the new jobs to space needs for each employment sector (TABLE 12-11). This forecast is based on a high employment growth scenario consistent with Newberg's economic development goals to bring more family-wage jobs to the area and to avoid becoming a bedroom community.

TABLE 12-11. Industrial Land Need

	2005-2025	2026-2040
Industrial	87 acres	75 acres

Source: Johnson Gardner, *Industrial & Office Land Need Methodology*

In addition to an overall supply of buildable land, Newberg needs to have sites available the meet the specific needs of potential industrial users, so-called "target industries". A variety of parcel sizes, building types, and land use designations are required to attract target industries and provide market choice. In 2005, there is a general lack of suitable large (20+ acre) industrial sites with access to a state highway and physical separation or transitional buffering from residential neighborhoods. Therefore, Newberg needs 4-5 large (20+ acre) industrial sites for the period 2005-2025 and an additional 6 sites for the period 2026-2040. The assumption is that approximately 50 percent of the future industrial employment will take place on large parcels.

2025 Industrial Land Supply and Need

The industrial buildable land inventory inside the current UGB has approximately 159 acres. While this may seem to be a large supply, it is disadvantaged by a number of elements. First, it consists mostly of small, scattered sites, with only 8 parcels larger than 5 acres and only 3 parcels that are 20 acres or larger. Second, several sites are hindered because of proximity to residential neighborhoods or other factors. Thus, some of the industrial should be rezoned for other uses. Third, a significant part of the "buildable" land is in fact in industrial use, such as storage yards. Also, the land need is adjusted to account for existing industrial uses that are displaced by the Newberg Dundee Bypass.

TABLE 12-12. 2025 Industrial Land Supply and Need

Industrial Site Size	2025 Need	Supply	*Surplus/(Deficit)*
Small/Medium sites (< 20 ac)	50 ac	99 ac	49 ac
Large sites (20+ ac)	100 ac	60 ac	(40) ac

Source: Newberg's Ad Hoc Committee on Newberg's Future
Report to Newberg City Council; Recommendations for Newberg's Future

Inside the current UGB, the only one large site (20 acres) that is viable in the long term is at the Sportsman Airpark. Two other sites are better suited for other uses long term. Therefore, Newberg needs to look to add additional industrial land to its UGB.

2040 Industrial Land Supply and Need

The period 2025-2040 will have additional needs for industrial lands. There is projected to be a need for 37 acres of additional small/medium sites. In addition, there will be a need for six large industrial sites (20 acres each).

TABLE 12-13. 2026-2040 Industrial Land Supply and Need

Industrial Site Size	2026-2040 Need
Small/Medium sites (< 20 ac)	37 ac
Large sites (20+ ac)	120 ac

Source: Newberg's Ad Hoc Committee on Newberg's Future
Report to Newberg City Council; Recommendations for Newberg's Future

Recommended Supportive Economic Development Actions

- Identify and maintain adequate industrial land supplies for new businesses as well as expansion of existing businesses. The *Report to Newberg City Council:*

Recommendations for Newberg's Future is a good step toward increasing this land supply.

- Encourage the installation of infrastructure within industrially zoned land to shorten the development of projects.

- "Certify" industrial sites to shorten the development time of projects and provide certainty to a business that regulatory and permitting issues will not delay the project's timeline.

- Identify and implement cost and time saving measures that improve the development permitting processes.

- Develop a financial incentives "toolbox" to recruit new businesses and encourage existing business expansions. The incentives should be applied only after a proposed project has reviewed by a rigorous analysis that demonstrates a clear financial benefit to the City.

- Construct and maintain the best utility systems possible (e.g. water and sanitary sewer), both from a quality as well as quantity (capacity) standpoint.

- Maintain a useful economic development website that is easy to navigate and contains substantive content the meets the needs of business.

- Invest in the best telecommunications infrastructure possible, in cooperation with public and/or private entities if necessary. While Newberg does have a telecommunication system with redundancy, higher levels of accessibility and greater, higher-speed choices (e.g. wi-fi, wi-max, fiber optics) would increase the community's competitive edge.

- Construct and maintain the best surface transportation infrastructure possible (e.g. roads, airpark, and railroad). This infrastructure component is critical to a community's economic health. Newberg is fortunate to be located along three state highways (99W, 219, and 240) and is only a 20 minute drive to Interstate 5. However, heavy traffic congestion on Highway 99W, a state designated "freight route" and the location of most of Newberg's commercial properties, serves as a deterrent for existing and potential customers and hinders industrial development. The Newberg/Dundee Bypass will reduce the current highway congestion and may allow the city to significantly improve the economic health of the historic Central Business District.

- Work with local, regional and state educational and training resources (private and public) to assist with the workforce training needs of businesses and provides opportunities for workers voluntarily upgrade their skills. The available workforce pool in the Newberg region is approximately 223,000 (Source: OregonProspector.com – website of Oregon Economic Development

Association). This was calculated using the following assumptions. 23 minute mean commute time (2000 Census) equaling a 15 mile radius from the center of Newberg. However, Oregon is recognized for having an educated workforce, one with good basic work skill sets that allows them to be relatively, easily trained.

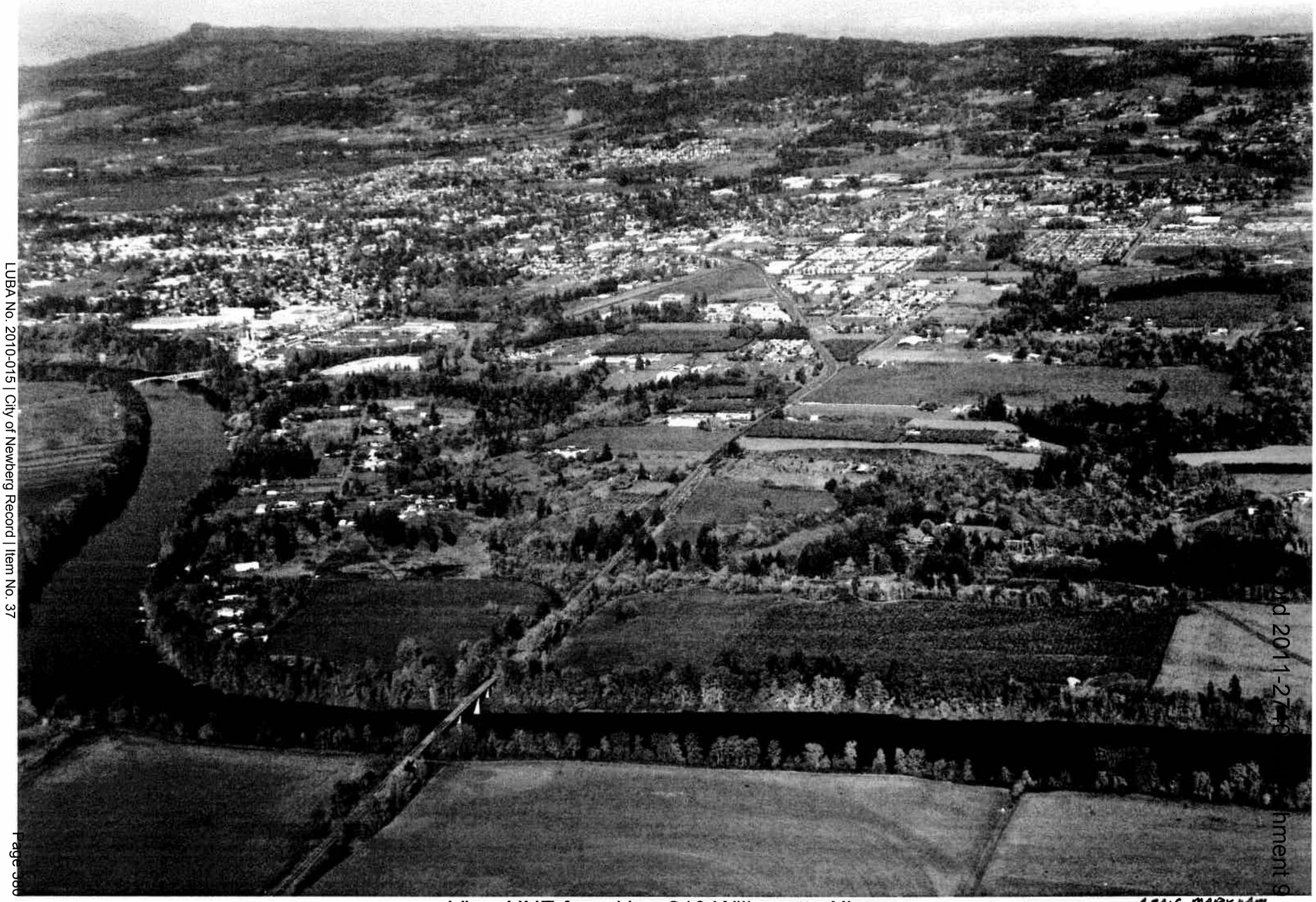
- Develop a quality of life in the community that attracts and retains a diverse, highly-skilled workforce. High-paying jobs usually require a high level of skills. Focus should be placed upon college educated workers in the 25 to 34 age range. As a whole, this population is more innovative, energetic, and productive than other age groups. Moreover, they are likely to begin setting roots, contributing to a community of their choosing, both economically and socially.

- Foster an environment of business innovation. Historically, businesses of older technologies that require a workforce of limited skills either die or production is shipped overseas. Innovation allows the community to remain economically competitive.

- Gauge health of local businesses regularly and identify how the city can help resolve issues, when feasible. Focus should be on businesses of the traded-sector and local clusters. Anticipate local problem areas by keeping abreast of region, national, and international business trends.

- Develop closer ties to organization/businesses located within the Portland area with a similar interest in regional economic development (e.g. Regional Economic Development Partners, future Portland Economic Development District, etc.). However, joining METRO will not be considered. Re-evaluate current relationship with Mid-Willamette Valley Community Development Partnership.

- Develop a Downtown Revitalization Master Plan prior to the construction of the Newberg/Dundee Bypass. Identify funding sources to implement the plan.



View NNE from Hwy 219 Willamette Xing

CRAIG MARKHAM
1 NOV 09

381 VIEW N FROM WILLAMETTE R. FROM HWY 219 BRIDGE (LOWER RIGHT)

CRAIG MAREHAM
1 NOV 09

CITY OF NEWBERG PLANNING COMMISSION
PUBLIC COMMENT REGISTRATION CARD

PLEASE STATE YOUR NAME PRIOR TO SPEAKING
(Agendas available at entrance)

Agenda Item No.: V-1 ***FILE No.:*** CPTA4-09-001 **Meeting Date:** 10 Dec 09

If you wish to make ORAL COMMENTS at this meeting, or submit written comments, please ***provide all of the information requested below.*** The agenda item numbers and project names are printed on the agenda. If you are attending the meeting to observe, you do not need to fill out a Registration Card.

Please check one (public hearings only):

- ☒ PROPONENT (For) } (with qualifications)
- ☒ OPPONENT (Against)
- ☐ UNDECIDED (Testify during either Proponent or Opponent testimony)
- ☒ WRITTEN COMMENT (oral testimony not required)

• Excessive amounts of proposed URA

• Proposal emphasizes quantitative expansion over qualitative improvements in the social, economic & environmental conditions of the Newberg Area.

• SE expansion area proposal to use 219 - McKay Rd - I-5 access puts the Marion County agricultural corridor along the route at risk. The Willamette Bridge lacks sufficient capacity to serve that purpose, and should not.

****If you don't raise an issue, either orally or in writing, you may be precluded from appealing****

★ ⟹ • We must preserve the human scale of our community.

Please print legibly:

Name CRAIG MARKHAM **Phone Number** 503-537-0587

Professional Standing *(if representing someone)* _____

Mailing Address *(including Zip Code)* 22245 NE ILAHERN LN, DUNDEE 97115

Email Address markhamcp@verizon.net Craig Markham
Signature

☐ Please do not release my contact information in a public records request

THANK YOU FOR COMPLETING THIS! These cards help us spell your name correctly for the permanent record and assists the Planning Commission Chair in determining time limits if there are many residents present.

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Newberg Planning Committee
Date: 12/10/09
File No CPTA4-09-001
Rec'd: 2009-275

Lee M. Does
Dr. Amy L. Does
173 NE Renne Road
Newberg, Oregon 97132

10 December 2009

Newberg Planning Commission
Lon Wall, Chair
401 E. Third Street
Newberg, Oregon 97132

re: Newberg Economic Opportunities Analysis

Dear Planning Commission Chair:
My wife Amy and I own a small farm adjacent to lands proposed for inclusion within the SE Urban Reserve Area, and have been active participants in the planning process to date. We recognize that long-term planning is essential for a city to grow in an orderly fashion, and we commend the city for producing a well-written document. Taken at face value, the EOA would appear to be offering a turn-key approach for launching Newberg into a stable financial future. Given the current financial climate, however, we believe the report is poorly timed and likewise fails to address several serious issues.

Our country is currently experiencing the worst financial crisis since the great depression, and Oregon already has more than its share of foreclosures and double-digit unemployment. Greed and bad decisions got us here, and many people still aren't accepting the idea that business as usual is only going to delay the much-needed recovery. Local businesses are struggling, and land values have plummeted for lack of buyers. From a purely economic standpoint, there is nothing to be gained by promoting "shovel-ready" properties while land prices are depressed and local industry is laying off employees by the hundreds.

My wife and I do believe that Newberg should seek to invest in the timely development of key targeted industries as described in the EOA, and we do agree that such development will eventually require additional lands beyond the current UGB. Although the city is clearly anxious to expand its borders, we believe the city has failed to demonstrate that immediate needs cannot be satisfied with high-priority lands already available within the current UGB. The EOA cites employment and growth figures prepared by Johnson-Gardner in 2004. While we believe the city should use due diligence to prepare for future growth, we do not believe the city should be quoting six-year old data. We likewise believe that updated figures would forecast significantly slower industrial growth for at least the next decade.

As farmers, Amy and I are compelled to point out that the majority of the land the city is seeking to condemn for its SE industrial development is currently zoned as Essential Farm Unit. It is our understanding that state law requires the city to utilize high-priority lands before requesting agricultural land. The city has previously argued that good planning required the early acquisition of such lands in order to prevent the lands from becoming parcelized. In remanding the city's SE URA this summer, however, the Oregon LCDC advised the city that EFU lands are by nature prohibited from owner-driven development. From a practical standpoint, therefore, there should be no sense of urgency to acquire and pave lands that are already protected against unexpected infill or other development. On that same note, we ask that you give serious consideration to the disinvestment factor that would inevitably accompany an announcement to rezone land from farming use to urban development.

Finally, we applaud the city for at least recognizing the value of "agri-tourism". I personally spent nearly twenty years of my life as a manager in the tourism industry, and can tell you that Newberg has considerable untapped potential to attract high-paying clientele on a year-round basis. Possibly our most visible assets would be the wine industry, the recently opened Allison Hotel, the golf course, and the Vista Balloon enterprise. These are only examples. What I see lacking in Newberg is a comprehensive and highly visible marketing strategy that presents the city itself as a destination with year-round activities. If you doubt the possibilities, take a look a the website for the City of Long Beach Washington. Long Beach is definitely at the "end of the road", yet they manage advertise tourist activities for nearly every month of the year. Newberg is relatively isolated in a valley that can be either a blessing or a curse. Why not have tourists driving to Newberg instead of through Newberg?

In conclusion, let me restate that my wife and I believe the city has failed to demonstrate an urgent or strategic need for near-term expansion beyond its current UGB. Our concern is that any suggestion of approval at this stage will result in an immediate –and we believe unwarranted- UGB expansion and subsequent loss of agricultural lands. In the six years I've been involved in this process, I've seen a lot of consultants come and go. Unlike the consultants, I'm here as a concerned property owner who is personally invested in Newberg's future. I'm also here because I believe Newberg can do much better than by simply duplicating outdated economic models that are currently failing in nearby cities with better transportation and resources than we have here in Newberg.

Conclusion: there's no urgency!! work with what we have now/build what we'll be thanked for in the future.

Sincerely,

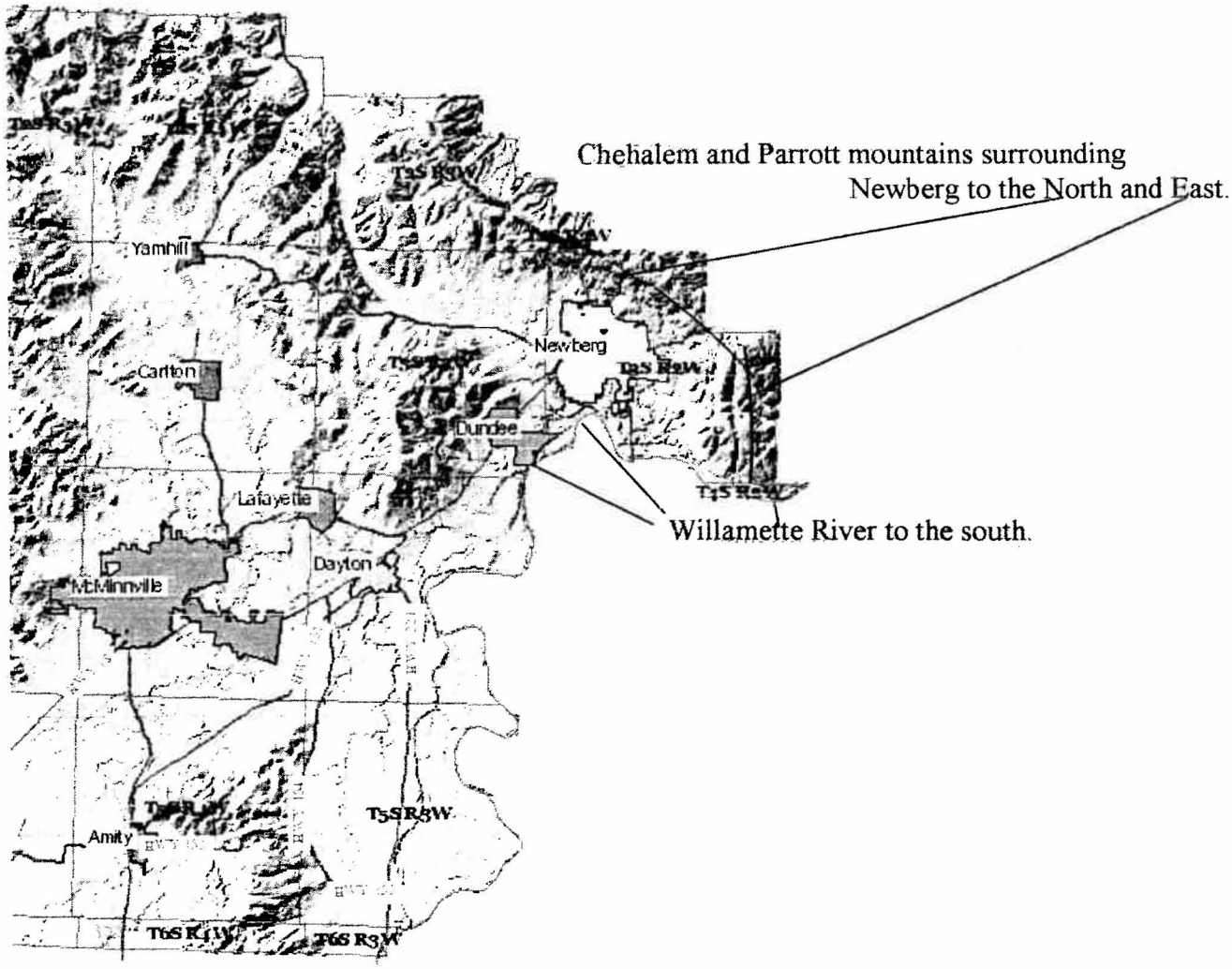
Lee M. Does

Amy L. Does, Ph.D.

Lee M. Does
Amy L. Does, PhD.

Submitted by Ken Wegler

Newberg Planning Committee
Date: Dec. 10, 2009
Re: 2009-275
No.: CPTA-09-001



If you look at this Yamhill County map you will notice the cities, with the exception of Dundee and Newberg, are surrounded for the most part by flat lands. Economic development expansion is not an issue to these cities. Newberg is not so positioned. With mountains to the North and East and the River to the south, Newberg is very limited in areas to expand and as such should have very strict guidelines with regards to development of any kind. Industrial land, and or/ private home lands have a very negative effect on the natural wildlife that is part of the Newberg eco system. The greenways around Newberg are being squeezed closer and closer together and the wildlife is disappearing while trying to survive in more and more cramped areas. The Economic Opportunities Analysis Revisions Draft report of November 2009 does not address anywhere in the entire report the impact of development on the wildlife that uses all of the surrounding Newberg areas that are being planned for development. With the exception of the already approved bypass, it is suggested, and recommended, that the Newberg City Council put on hold any development of any kind that is being proposed in Ordinance No. 2006-2635 and revisions to said ordinance. Also being brought to your attention is that it is imperative to the well being of the wildlife that surrounds and is part of the Newberg UGR and UGB, that the Yamhill County Planning Commission block all future plans for development in the Newberg area until after the bypass is finished and the true impact on the wildlife and other natural resources surrounding Newberg have been assessed from the impact of such a major shift caused by the bypass. Any real needs for future development opportunities can and should wait until after such assessment has been made.

Thank you, **Ken Wegter. 12-10-09**. Born in Newberg, Oregon, with Everest and Jones family ancestry going back to the Newberg area 1848.

1000 friends of Oregon
534 SW Third Avenue, Suite 300 • Portland, OR 97204 • (503) 497-1000 • fax (503) 223-0073 • www.friends.org
Southern Oregon Office • PO Box 2442 • Grants Pass, OR 97528 • (541) 474-1155 • fax (541) 474-9389
Willamette Valley Office • 189 Liberty Street NE, Suite 307A • Salem, OR 97301 • (503) 371-7261 • fax (503) 371-7596

December 10, 2009

Newberg Planning Committee
Date: Dec. 10, 2009
Re: 2009-275
No.: CPTA-09-001

Newberg Planning Commission
Lon Wall, Chair
414 E. First Street
Newberg OR 97132

Dear Commissioners and Staff:

Thank you for the opportunity to comment on the draft *Revised Economic Opportunities Analysis* (*EOA*) and related text amendments to the comprehensive plan. 1000 Friends of Oregon is a nonprofit, charitable organization dedicated to working with Oregonians to enhance our quality of life by building livable urban and rural communities, protecting family farms and forests, and conserving natural and scenic areas.

1000 Friends of Oregon and Friends of Yamhill County support efforts to plan for Newberg's future and we maintain a keen interest in the outcome of these efforts.

It is evident that considerable work has gone into the analysis. Nonetheless, we have several concerns regarding the document's underlying assumptions and the resulting conclusions, as well as concerns regarding the technical analysis.

In summary, we believe the draft overestimates the amount of employment land Newberg will need over the planning period, and underestimates the capacity of available lands within the existing UGB to meet those needs, resulting in potential overexpansion of the urban area.

A more compact UGB will reduce pressure on farmland and other rural lands outside the current UGB, reduce the cost of extending infrastructure beyond the edge of existing development, and reduce transportation costs for Newberg residents who work and shop in Newberg.

We also recognize that the city will undertake additional work prior to any actual expansion of the UGB or Urban Reserve Area. Nevertheless, it is in the best interests of all that the inventories, assumptions, and need forecasts in the *EOA* be as sound as possible. To that end, we offer the following comments:

1. <u>The City should plan to use land in the future more efficiently than it has in the past.</u>

The *EOA* assumes that future industrial development on new land will not use land any more efficiently than past industrial development.

Pages 43-44 state:

> Table 12- 18 shows the 2030 need … for a total industrial site need of 168 gross buildable acres by 2030. The total land needs equate to approximately

> 9.5 employees per developed acre, which reflects the reality that many firms look for sites that allow for future expansion, and is *consistent with the site size per employee ratio of many of Newberg's largest industrial employers*... (emphasis added).
>
> In addition, Johnson-Gardner projected 710 additional employees for the period 2031-2040. At an average of 9.5 employees/acre, which is *similar to the employee density of firms currently in Newberg*, plus 10% of the land area for right-of-way (based on an a mix of small and large sites),this will generate an additional need for 83 gross buildable acres of land for the period 2031-2040. (emphasis added).

Rather than planning for a future that looks like the past, the city should instead plan for more efficient use of land in the future, consistent with Goal 14. This is especially true since Newberg plans to provide future urban industrial land by expanding onto prime farmland, which currently supports the county's leading industry- agriculture.

The same amount of industrial buildings can be sited on smaller amounts of vacant land and provide just as many employment opportunities. Park-like campuses are nice, but the amount of un-utilized land they contain need not be as extensive as it has been in the past. Studies conducted for Salem and McMinnville in 2000 and 2001 assumed an average of 11 industrial employees per acre.

The Planning Commission should recommend that Newberg plan for future industrial development that will use land at least as efficiently as McMinnville and Salem.

2. Calculations in the EOA apparently omit stated assumptions regarding redevelopment, infill and intensification of uses.

In the real world many new jobs are created without land being developed or redeveloped; a processing plant or manufacturer adds a second shift; a restaurant adds additional staff in the dining room and kitchen. Other jobs are accommodated through infill and redevelopment. Metro found that, "On average, 40 percent of all job growth is absorbed through redevelopment or infill."[1]

The text of the *EOA* recognizes this dynamic and states that:

> Table 12-18... also includes assumptions that most (55%) of Newberg's future industrial employment will be located on sites 10 acres or less, and that one-third of those future new industrial firms under 10 acres in size, and one-half of firms under 2 acres in size, will find a site through infill redevelopment or intensification of existing employment land uses. (*EOA*, p. 43)

Despite this text, the calculations of land need apparently fail to include these stated assumptions. Table 12-12 shows industrial employment projections. 1,446 new jobs are projected between 2010 and 2030. Table 12-18 allocates a need for buildable land to all of

[1] Metro Report, September 1999, Urban Growth Report Update" p.51

these 1,446 new jobs, including those on sites under 10 acres in size, at an overall average of 8.6 jobs per gross buildable acre. There is no indication that *any* jobs have been allocated to infill, redevelopment, or intensification of existing employment land uses.

In addition, it is not clear why the stated assumptions limit refill potential to sites smaller than 10 acres. At least some job growth will also be absorbed through intensification of existing employment uses on larger sites.

The Planning Commission should direct staff to return with a corrected land need calculation that incorporates stated assumptions regarding infill, redevelopment, and intensification of existing employment uses, and should recommend that similar assumption be made for sites larger than 10 acres.

3. Employment projections are based on outdated, pre-recession forecasts.

The job growth projections that form the basis for the proposed revisions to the EOA were prepared over 5 years ago in a very different economy and were based on even older long-range employment forecasts by the State of Oregon. In the last two years, the local economy has shed thousands of jobs in the worst recession in decades. Industrial sectors have been particularly hard hit. Most economists agree that it will take years to return to our pre-recession job levels and even longer to grow significantly beyond them.

It doesn't make sense to undertake a major revision to the city's Economic Opportunities Analysis without updating the employment projections based on *current* long-range employment forecasts. Moreover, basing a major plan revision on outdated information would seem to violate Goal 2 requirements for an adequate factual basis.

The Planning Commission should recommend the preparation of updated employment projections based on the most current long-range long range employment projections from the State Office of Economic Analysis.

4. South Industrial Area

The *EOA* includes as a "special opportunity" nearby expanses of large, flat farmland in what it calls the South Industrial Area. It states:

> Newberg recently prepared the *South Industrial Area Master Plan*, which envisions utilizing the area along Highway 219 south of Wynooski Road by including several large, flat parcels for future industrial use. The South Industrial Area is uniquely posed to accommodate industrial users in the region:
>
> • It contains large, level sites. The area can accommodate employers needing sites of 10 acres up to 100 acres…

This land is prime farmland, zoned for Exclusive farm Use, and is not within the UGB or URA. We object to characterizing the urbanization of prime farmland as a "special opportunity" or "comparative advantage." Nearly every city in the valley is adjacent to large blocks of prime farmland. If other cities were to follow Newberg's

lead in competing to urbanize it for industrial uses, Newberg would have no "advantage" or "special opportunity."

More significantly, the damage to our local and regional economies would be immense. It would also be contrary to ORS 215.243, which states:

> **215.243 Agricultural land use policy.** The Legislative Assembly finds and declares that:
>
> (1) Open land used for agricultural use is an efficient means of conserving natural resources that constitute an important physical, social, aesthetic and economic asset to all of the people of this state, whether living in rural, urban or metropolitan areas of the state.
>
> (2) The preservation of a maximum amount of the limited supply of agricultural land is necessary to the conservation of the state's economic resources and the preservation of such land in large blocks is necessary in maintaining the agricultural economy of the state and for the assurance of adequate, healthful and nutritious food for the people of this state and nation.
>
> (3) Expansion of urban development into rural areas is a matter of public concern because of the unnecessary increases in costs of community services, conflicts between farm and urban activities and the loss of open space and natural beauty around urban centers occurring as the result of such expansion.
>
> (4) Exclusive farm use zoning as provided by law, substantially limits alternatives to the use of rural land and, with the importance of rural lands to the public, justifies incentives and privileges offered to encourage owners of rural lands to hold such lands in exclusive farm use zones. [1973 c.503 §1]

We also quibble with the statement that, "The area has access within about 10 minutes to I-5" (*EOA*, p. 2). It takes substantially more than 10 minutes under current conditions, especially when tractors and other farm equipment are using the roads. If heavy industrial truck traffic were to increase, travel times would almost certainly increase as well.

Luckily, Newberg can accommodate future industrial job growth while limiting encroachment into this valuable resource area. For the reasons stated elsewhere in this letter, the growth can be accommodated on significantly less land. In addition, there are alternative areas for development within the city; within an existing, acknowledged URAs; and within exception areas, which by law, are a higher priority for inclusion.

5. Sites for expansion of existing industries are an advantage not a disadvantage.

In its list of comparative *disadvantages*, the *EOA* states:

> In 2009, Newberg lacks suitable industrial sites to meet needs of targeted employment opportunities...

c. Some existing sites are being reserved for future expansion of adjoining industrial users.

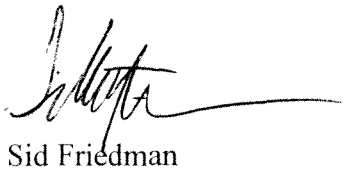
The expansion of existing industrial users is a key component of Newberg's economic strategy and they are a key component of the city's targeted industry clusters. The availability of land for their expansion is an advantage, not a disadvantage. At any rate, these sites will certainly absorb some of Newberg's projected industrial job growth and they should be considered accordingly.

6. The *EOA* contains an internal inconsistency in its lists of targeted industries.

Table 12-15 contains a list of Newberg Targeted Industries. Under the business cluster of General Manufacturing, it includes "Sports apparel/recreation-related products as a targeted business-type. In Table 16, this has been changed to "Sports and Recreational Campus" and placed in the large site need category.

We hope these comments are helpful in achieving that outcome. Please include them in the official record of these proceedings and notify us of any decisions and/or future hearings in this matter.

Sincerely,



Sid Friedman
1000 Friends of Oregon

/S/

Ilsa Perse
Friends of Yamhill County

Cc (electronic): DLCD
Yamhill County Planning Department
Oregon department of Agriculture

December 10, 2009

City of Newberg

Planning Commissioners,

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DEC 08 2009

The Newberg planning department does a convincing job of why this southern area is needed for the future growth of Newberg. It is their job to convince you this is a good thing.

I am asking you; is this southern industrial expansion necessary? The planning department sees a lack of suitable industrial sites. The area being proposed is already occupied land; it is being used for agricultural purposes. Is farming not an industry? Too often when we think of industry we think of manufacturing plants and hardscape buildings, parking areas and lots and lots of employees. We don't see empty expanses of land as employers. I currently work for one of the largest hazelnut growers in the area. They gross well over one and a half million dollars a year, house three families on their land and employ many people. They also support local businesses such as Wilco, NAPA, Tire Warehouse, George's packing, UPS along with many independent small business owners. Do you really not see the value of this land?

Society is at a major turning point, for too long we have followed along the paths of what developers have told us was good for the land. It is time for you to take a personal stand and say "NO". Tell the planning department to come back with different ideas, tell them not to look for the easy way but be creative think outside the box. There is land within the city currently that can be used for new industry. **Use it!** Preserve the uniqueness of your small town city. Preserve the farmlands. Invite people to visit this town and its unique vineyards and farms, invite them to meander the country roads, look at the vast fields of green and the wonderful wildlife living within its boundaries. People will not come to visit your vineyards mixed within your heavy industrial area. Preserve what you have, once you pave over the land you will surely loose the small town country feel you are striving for. You already have a farming/agricultural industry; you just have only to open your eyes to see it.

Respectfully,

Vicki Shepherd
30230 NE Benjamin RD
Newberg, OR 97132
503-538-9466

Newberg Planning Commission Hearing
10 Dec 09

As someone who has spent my entire life associated with the City of Newberg, in the past, a product of Newberg Schools and, currently a working farmer, I ask that this Commission request that City staff explore alternatives to the "Southeast Industrial" area as outlined in the document(s) before you.

Prime farm land, land that can produce food for human consumption, is too vital to be paved over for eternity. Once farmland is lost it is lost forever!

The goal of local employment is worthy. However, there is land within the City and within the current UGB and URA that can (and I would add MUST) be developed or redeveloped for industry. I ask that you request that City staff inventory such land, before you approve a plan to destroy prime farmland. There is, in my opinion, under utilization of existing sites within the City and within the current UGB/URA boundaries.

There is land fronting 99W between the City of Newberg and the City of Dundee that is is partially developed as industrial. This land is served by rail transportation as well as the highway. This land could and should be inventoried for redevelopment. The mythical "no development agreement" between the two cities expired many years ago. There is documentation to support my statement.

Lastly, I request that you review the rationale for large industrial sites,"industrial parks," as opposed to smaller parcels that are available and can accommodated the needs of most industrial companies.

Thank you for your consideration and deliberation on my testimony.

Grace Schaad
31525 NE Schaad Rd
Newberg, OR 97132
503-538-2006

RECEIVED
DEC 04 2009

Robert B. Roholt
31150 NE Schaad Rd.
Newberg, Oregon 97132

December 9, 2009

Newberg Planning Division
Attn: Jessica Nunley
File: CPTA4-09-001
P.O. Box 970
Newberg, OR 97132

Re: Comments on the November 2009 Draft of the Economic Analysis for the City of Newberg

I agree with the Economic Opportunities Analysis that Newberg's economy has traditionally been rural in nature and that Newberg has a strong sense of place. I also agree that we should support existing businesses and moderate growth at a rate consistent with long term community health. But why did we grow 38% between the 1990 and 2000 while the state of Oregon only grew 20%(page 14)? Why do we have to be leading the way in numbers regarding growth? I feel that part of the reason is preferential bias by those planning Newberg's future to make everything bigger, under the ideology of "bigger is better." However, the trend towards rapid urbanization of Newberg, which I feel this document supports, is not something that should be encouraged. We see the effects in our neighboring communities, and it is not good.

This document supports the expansion of the South Industrial Area into prime farmland based on a state wide need for industrial land. However in an Oregonian article published December 7, 2009, it described the problems that Gresham has had with their huge "Springwater" Urban Growth Boundary expansion area. In 2002, Gresham pushed hard for this 1,200 acre area to be in the UGB and their goal was to create jobs. In the seven years since there has been no increase in jobs or development. Now they are focusing on bringing in sites to the UGB that are ranging from 5 to 50 acres. Their grand plans did not fair well. What makes us think that we will do any better?

I have worked in industry and for industry most of my 30+ year career as a Professional Engineer and I am skeptical that this state "really" wants industry. Politicians talk about industry out of one side of their mouth when jobs are needed, and out of the other side of there mouth when a civic or environmental group complains about the problems with industry. Another large industrial site in Newberg is unnecessary, we will be lucky if in 10 years we have still maintain the large industries that currently exist here. Maybe the biggest reason we will not have any large industry is the lack of transportation. In today's economy, most freight moves by truck. Newberg is currently limited because all of the roads in and out of this town are severely constrained. Any growth that we incur would only further strain these already limited roads. Unless this analysis takes such transportation limitations and the factors necessary to improve them into consideration, it cannot be valid. The city has doubled in size

since the 1990's utilizing roads that have not been expanded at any point during that timespan. Any growth that would be created would only exacerbate the already limited traffic situation.

We need a more 21st century vision in this analysis, one that utilizes ideas that take into consideration what our world will be like in 2040 not a vision of 2009 expanded to 2040. This vision might be smaller, denser, more compact industrial and commercial areas, possibly using rail or even water for improved efficiency and environmental sustainability.

The Economic Opportunities Analysis provides a lot of valuable information. However, If we are using this document to plan Newberg's future, the conclusions we draw from the data need to provide for a Newberg that is more livable and sustainable, not one that is just bigger.

Sincerely

Robert B. Roholt

From: Roger Currier [mailto:rcurrier@hevanet.com]
Sent: Wednesday, December 02, 2009 9:42 PM
To: Barton Brierley; Dan Danicic
Cc: Matson Haug
Subject: UGB meeting

Planning Commissioners:

Please consider the growth of Newberg's UGB of 2100 acres very carefully. I would question the need for this large of inclusion at this time for many reasons, a couple of which will attempt to write about.

The first is the fact of the decrease in population growth that we and the surrounding cities have seen. Newberg is down to 2.2% and Mac is down to only 1.1% . Given this alone should give you thought as to a need of this size! You are told to consider almost all the easy to build on and easy to service land for the new UGB. So then when it comes time for a future group to do so again it will be very costly because there will be nothing left for easy quick inclusion!

Secondly; the fact of using very large percentage of very prime farmland to pave over that will never produce another fruit,vegetable, or grain crop ever is terrible to think of! Maybe this could lend itself to re-thinking the class of soils involved? Maybe you could delete some of the projection for addition to help save our land? Maybe you could piece meal the growth in several other areas (that cost more to service) to help save what Newberg was and is known for, an agricultural area of diverse farming?

Third would be to ask staff to produce to you a survey of the vacant Industrial and Commercial property that is sitting vacant and unused right now in Newberg. Even the fact that Newberg owns the sewage pre-treatment tank in the North section of town on Illinois Street that could be pumped to and used if needed. Maybe we should be working more at helping to fill and use our vacant resources that we have? Maybe we need to think about building that second and third story on the 2nd street parking lot for other things? Maybe we could build affordable housing on the second or third story and parking on the other one? I am sure that some contractor would love to get into a project like that!

The forth item would be that of what will happen if you accept all this expansion and then the Bypass is not built? We the City, County or even State have no money to build any roads to help move all that traffic that will be projected to use this land! We will have to use our old roads that are falling apart now to try and move all these cars and trucks. WE can only hope that they do not go toward Dundee or McMinnville! I know everyone says that they will build the bypass soon. How many years has soon been stretched out now? Maybe 30 plus that I can recall.

So lets try to keep Newberg what it is known for and what we all moved and live here for. We do not have to do any massive expansion just because we are told that we "might" need it by projections. How often are they really correct? Do we have to believe and go with a trend or can we wait and work toward a plan when we really need it maybe only a year or two in advance with the idea (for infrastructure and planning) that we may use this land then. I am not a NO growth person! But I would like to see Newberg look like what people liked about the area left till we really need it.

Thank You very Much for Your Consideration

Roger Currier
(61 year resident)
Newberg,Oregon

FILE #: CPTA-09-001

Meeting Type:
X Planning Commission
___ City Council
___ Other:

CITY OF NEWBERG
AFFIDAVIT OF NOTICING

REFERENCE ATTACHED LIST(S)/NOTICE(S)

I, Steve Olson, for the City of Newberg, Oregon, do hereby certify that the attached Notice of Public Hearing was:

a. mailed to the following list of property owners, by United States mail, postage prepaid on _____; (by applicant)

b. noticed in the Newberg Graphic on 11/25/09; NG
Date faxed to Graphic: 11/19/09
Confirmation that ad will run by: Hilary Lefebure 11/19/09
Name *Date*

c. posted on the site on date: _____; (by applicant)

d. posted in four public locations (City Hall, Library, Fire Station, Public Safety Building) on date: 11/24/09.

Steve Olson — Associate Planner — 11/25/09
Signature *Title* *Date*

DATE NOTICE OF DECISION MAILED (AFTER PUBLIC HEARING) _____

Distribution of copies:
notice only: chrono notice file, tickler to check ad, post as noted above
fax file (alpha): notice, fax cover
project file: affidavit and attachments (notice, fax cover letter, fax transmission report)

6/26/01
K:\WP\ADMIN\MISC\MICHELE\FORMS\CopyofAffnotfrm.wpd

Newberg City Hall
503.537.1240
www.newbergoregon.gov

Planning & Building Division
503.537.1240
503.537.1272 Fax

PLANNING AND BUILDING DEPARTMENT

P.O. Box 970 • 414 E. First Street • Newberg, Oregon 97132 • (503)537-1240 • Fax (503)537-1272

HEARING NOTICE

The **Newberg Planning Commission** will hold a public hearing on December 10, 2009 at 7 p.m. at the Newberg Public Safety Building, 401 E. Third Street, Newberg, OR, to evaluate the following proposals:

Affordable Housing Action Plan Implementation. The Planning Commission will consider changes to the Newberg Development Code to support the development of more affordable housing. The changes would do the following:

- Add a definition regarding "special needs housing";
- Allow reduction of parking requirements where an affordable housing development is near a transit stop or where the development provides its own transit;
- Modify current driveway standard to allow more than two lots per driveway; and,
- Add design standards for housing that promote the development of attractive, livable, and functional neighborhoods.

File # G-09-007

Revise the Economic Opportunities Analysis. The Economic Opportunities Analysis (EOA), adopted in 2006, is a section of the Comprehensive Plan and also helps implement Statewide Goal 9 (Economic Development). The EOA revisions include updated buildable land inventories for commercial and industrial land, updated demographic and economic statistics, and updated information regarding Newberg's economic development strategy. File # CPTA4-09-001.

You may examine information regarding this proposal at the Newberg Planning and Building Department, 414 E. First Street, Newberg, OR 97132, or at www.newbergoregon.gov. The staff recommendations regarding this proposal will be available one week before the public hearing at www.newbergoregon.gov (a link will be posted on the Upcoming Public Meetings calendar for December 10, 2009). If you have any questions, please call the Newberg Planning Division at 503-537-1240. All interested persons may appear and provide testimony. Any written testimony must be submitted by **December 3, 2009**. Only those persons who participate either orally or in writing in the hearing proceedings leading to the adoption of the action may appeal the decision.

Date Mailed/Posted: 11/19/2009

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"Working Together for a Better Community – Serious About Service"

HEARING NOTICE

The **Newberg Planning Commission** will hold a public hearing on December 10, 2009 at 7 p.m. at the Newberg Public Safety Building, 401 E. Third Street, Newberg, OR, to evaluate the following proposals:

1. **Revised Economic Opportunities Analysis.** Consider revisions to the Newberg Economic Opportunities Analysis (EOA). The EOA revisions include updated buildable land inventories for commercial and industrial land, updated demographic and economic statistics, updated information regarding Newberg's economic development strategy, and updates to the Comprehensive Plan land need and supply tables. File # CPTA4-09-001.

2. **Affordable Housing Action Plan Implementation.** The Planning Commission will consider changes to the Newberg Development Code to support the development of more affordable housing. The changes would do the following:
   - Add a definition regarding "special needs housing";
   - Allow reduction of parking requirements where an affordable housing development is near a transit stop or where the development provides its own transit;
   - Modify current driveway standard to allow more than two lots per driveway; and,
   - Add design standards for housing that promote the development of attractive, livable, and functional neighborhoods.

   File # G-09-007.

You may examine information regarding these proposals at the Newberg Planning and Building Department, 414 E. First Street, Newberg, OR 97132. The staff recommendations regarding these proposals will be available one week before the public hearing at www.newbergoregon.gov (a link will be posted on the Upcoming Public Meetings calendar for December 10, 2009). If you have any questions, please call the Newberg Planning Division at 503-537-1240. All interested persons may appear and provide testimony. Any written testimony must be submitted by **December 3, 2009**. Only those persons who participate either orally or in writing in the hearing proceedings leading to the adoption of the action may appeal the decision.

Published: November 24, 2009

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FILE #: _____

MEETING TYPE:
- ☐ City Council
- ☐ Planning Commission
- ☐ NUAMC
- ☐ NDRC
- ☒ Other Power of Newberg's future

CITY OF NEWBERG
AFFIDAVIT OF NOTICING

REFERENCE ATTACHED LIST(S)/NOTICE(S)

I, Tami Bergeron, on behalf of the City of Newberg, Oregon, do hereby certify that the attached Notice of Public Hearing was:

a. Mailed to the attached list of ☒ citizens / ☐ property owners by United States mail, postage prepaid on 11/06/09;

b. Emailed to the attached list of ☒ citizens / ☐ property owners on 11/06/09;

c. Posted on the ☒ website / ☐ site on 11/06/09;

d. Posted in four public locations (City Hall, Library, Fire Station, Public Safety Building) on N/A;

e. Noticed in the Newberg Graphic on —;

Dated emailed to Graphic: —

Confirmation that ad will run by: — _____ _____
Name *Date*

Tamara A. Bergeron — *Signature*
Office Mgr — *Title*
11/06/09 — *Date*

Date notice of decision mailed (after public hearing): _____

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TAB--03/02/2009

News of Newberg's Future
Effective 11/6/2009
Newberg Future MASTER

First Name	Last Name	Business Name	Street #	Dir Prefix	Street Name	Dir Suffix	Bldg	City	State	Zip Code	Phone #	Email	Prefer Email?	Prefer Mail?	Mail Returned	Date Address Updated	Owner Req Removal from Ma
Ghizzone Trusts			30475	NE	End			Newberg	OR	97132			FALSE	TRUE	FALSE		
Bob	Albulet							Newberg	OR	97132	503.625.2171	no such email address	FALSE	FALSE	FALSE		
Donnald	Alexander		1112	N	ek Ln			Newberg	OR	97132		on.net	TRUE	FALSE	FALSE		
Gary	Allen	Newberg Graphic	109	N	ol St.			Newberg	OR	97132	503-538-2181	no such email address	FALSE	TRUE	TRUE	12/27/2007	
Mike	Allen		1709		berry			Newberg	OR	97132			FALSE	TRUE	FALSE		
Norma	Alley	City Council						Newberg	OR	97132		or.us	TRUE	FALSE	FALSE		
Erik	Andersson		255		merci	NE		Salem	OR	97301		.us	TRUE	FALSE	FALSE		
Bob	Andrews	City Council	1103	N	Ave			Newberg	OR	97132	503.537.7542	.or.us	TRUE	FALSE	FALSE	09/03/2008	
Chris	Andrews		207	SW	Gree			Newberg	OR	97132			FALSE	TRUE	TRUE	01/10/2008	
Marv & Kathy	Ankele		14465	NE	Hill			Newberg	OR	97132	503.538.8596		FALSE	TRUE	FALSE		
Scott & Susan	Ankeny		24000	NE	Yam			Newberg	OR	97132	503.538.2037		FALSE	TRUE	FALSE		
Earnest	Annas		21755	NE	en			Dundee	OR	97115			FALSE	TRUE	TRUE	02/12/2008	
Rory & Lori	Antis		24501	NE	240			Newberg	OR	97132	503.537.8002		FALSE	TRUE	FALSE		
Michael	Ard	Lancaster Engineering	321	SW	Ave		400	Portland	OR	97204	503-248-0313		FALSE	TRUE	FALSE		
Gilbert	Arendt		878		nwoo			Salem	OR	97301		no such email address	FALSE	TRUE	TRUE		
Steve	Ashby		No such address					Newberg	OR	97132		no such email address	FALSE	FALSE	TRUE		
Frances & Bonnie	Atteberry		13750	NE	Shor			Newberg	OR	97132			FALSE	TRUE	FALSE		
Terry	Atzen		29365	NE	am			Newberg	OR	97132	503.358.0525	terry@haironfirenow.com	TRUE	FALSE	FALSE		
Peter	Backus		32925	NE	Parre			Newberg	OR	97132			FALSE	TRUE	FALSE		
Denise	Bacon	City Council						Newberg	OR	97132		g.or.us	TRUE	FALSE	FALSE	08/14/2009	
Tom	Bailey		12410		y Ln			Newberg	OR	97132	503.538.2266	reno78@verizon.net	TRUE	FALSE	FALSE		
Chris	Baird		No such number									works9911@hotmail.com	TRUE	FALSE	FALSE		
Trina & Chris	Baird		No such number								503.680.6389	no email address	FALSE	FALSE	FALSE	07/11/2008	
Al & Angela	Baker		32065	NE	l			Newberg	OR	97132	503.538.5351		FALSE	TRUE	FALSE		
Anita	Baker		30150	NE	onvill			Newberg	OR	97132	503.538.2981		FALSE	TRUE	FALSE		
Thomas	Barnes	Planning Commission						Newberg	OR	97132		y.mil	TRUE	FALSE	FALSE		
Bruce & Bobbie	Barnett		4600	NE	Hero			Newberg	OR	97132		.net	TRUE	FALSE	FALSE		
Bruce	Barrone		30140	NE	amin			Newberg	OR	97132			FALSE	TRUE	FALSE		
Nancy	Barrone		30140	NE	amin			Newberg	OR	97132	503.538.6798		FALSE	TRUE	FALSE		
Mark	Bartlett		14480	NE	Hill			Newberg	OR	97132	503.538.4195	no such email address	FALSE	TRUE	TRUE		
Patti	Bartlett		14480	NE	Hill			Newberg	OR	97132	503.538.4155	om	TRUE	FALSE	FALSE		
Jim & Susan	Bascom		816	W	dan			Newberg	OR	97132	503.984.0368	jsbascom@comcast.net	TRUE	FALSE	FALSE		
Brooks	Bateman							Newberg	OR	97132		erg.or.us	TRUE	FALSE	FALSE		
David	Beam								OR			or.us	TRUE	FALSE	FALSE		
David	Beasley		No such number		ie Dr			Newberg	OR	97132		no such email address	FALSE	FALSE	TRUE	08/01/2008	
Rick	Beaudry		30800	NE	en			Newberg	OR	97132			FALSE	TRUE	FALSE		
Esther	Bell		29555	NE	amin			Newberg	OR	97132			FALSE	TRUE	FALSE		
Al	Benkendorf		2701	NW	hn		461	Portland	OR	97210	503.226.0068	apb@benkassoc.com	TRUE	FALSE	FALSE		
James	Bennett		410	N	ge			Newberg	OR	97132		no such email address	FALSE	FALSE	TRUE	10/27/2008	10/27/2008
Jim	Bentley		29680	NE	d Ln			Newberg	OR	97132	503.538.3435	jimb33@comcast.net	TRUE	FALSE	FALSE		
Calvin	Beralas		625	N	hingt			Newberg	OR	97132		no such email address	FALSE	TRUE	TRUE	10/27/2008	
Helge	Berg		29601	NE	d Ln			Newberg	OR	97132			FALSE	TRUE	FALSE		
Helge	Berg		26601	NE	d Ln			Newberg	OR	97132			FALSE	TRUE	FALSE		
T.H. & Loretta	Bestwick		30575	NE	wood			Newberg	OR	97132			FALSE	TRUE	FALSE		
Gregg	Blume		401		e Ln			Newberg	OR	97132	503.538.5746	greggblume@msn.com	TRUE	FALSE	FALSE		
Yamhill Co.	Commissioners		534	NE	St			McMinnville	OR	97128			FALSE	TRUE	FALSE		
Mark & Colleen	Bourassa		23505	NE	n Rd			Newberg	OR	97132	503.538.2566		FALSE	TRUE	FALSE		
Larry	Bowe	Providence Hospital	1001		denc			Newberg	OR	97132			FALSE	TRUE	FALSE		
Angie	Bowman		805		nvall			Newberg	OR	97132	503.495.5811	no such email address	FALSE	TRUE	TRUE		
Mike	Boyes	City Council	1109	S	Rd			Newberg	OR	97132		or.us	TRUE	FALSE	FALSE	10/27/2008	
Steve	Bradford								OR			com	TRUE	FALSE	FALSE		
Steve	Bradford								OR			ssjjbradford@msn.com	TRUE	FALSE	FALSE		
Todd	Brand		1300	NE	alem			Newberg	OR	97132	503.538.5585		FALSE	TRUE	FALSE		
Eric & Juanita	Brandenburg		14450	NE	Hill			Newberg	OR	97132	503.537.0146	no such email address	FALSE	TRUE	TRUE	04/22/2009	
Mike	Brandt		525	NE	ST			McMinnville	OR	97128			FALSE	TRUE	TRUE	02/04/2008	
Chris	Brecke		200	N	rds			Newberg	OR	97132			FALSE	TRUE	TRUE	02/04/2008	
John	Bridges	Palmer	515	E	St			Newberg	OR	97132	503-538-3138	john@newberglaw.com	TRUE	FALSE	FALSE		
Barton	Brierley							Newberg	OR	97132		rg.or.us	TRUE	FALSE	FALSE		
Dwayne	Brittell		620	E	St			Newberg	OR	97132		no such email address	FALSE	TRUE	TRUE		
Craig	Brown	Matrix Dev./Legend Homes	12755	SW	Ave.		e	Portland	OR	97223	503.620.8080	m	TRUE	FALSE	FALSE		
David	Brown		24515	NE	240			Newberg	OR	97132	503.538.3941		FALSE	TRUE	FALSE		
John	Brown		29415	NE	amin			Newberg	OR	97132			FALSE	TRUE	FALSE		
Tom & Barbara	Brown		2201	NE	alem			Newberg	OR	97132	503.538.6647		FALSE	TRUE	FALSE		
Bill	Burton	GVA Kidder Mathews	1	SW	mbia		e	Portland	OR	97258		bburton@gvakm.com	TRUE	FALSE	FALSE	12/12/2007	
Darryl	Burton		1007	W	dan			Newberg	OR	97132			FALSE	TRUE	FALSE		
John	Butorac		329		y	Ct		Newberg	OR	97132			FALSE	TRUE	FALSE		
Marc	Butorac		610	SW	ST		e	Portland	OR	97205	5032285230	mbutorac@kittelson.com	TRUE	FALSE	FALSE	10/27/2008	

News of Newberg's Future
Effective 11/6/2009
Newberg Future MASTER

Violet	Caffal-McNeil								OR			vimcneil@msn.com	TRUE	FALSE	FALSE	
Jessica	Cain	Gunn Cain & Kinney LLP	700		rah	250	Newberg	OR	97132			cain@GCKattorneys.com	TRUE	FALSE	FALSE	09/02/2008
Helen	Caldwell				BOX		Idyllwild	CA	92549				FALSE	TRUE	TRUE	02/12/2008
Mark	Case				Box		Newberg	OR	97132				FALSE	TRUE	FALSE	
Arthur	Catlett		29585	NE	Ln		Newberg	OR	97132	503.554.6848		acatlett@hevanet.com	TRUE	FALSE	FALSE	
Michael	Cerbone	WRG Design Inc.	5415	SW	gate	100	Portland	OR	97221	503-419-2500		ign.com	FALSE	TRUE	FALSE	
Newberg	Com		415	E	dan		Newberg	OR	97132				FALSE	TRUE	FALSE	
Linda	Chapman		23564	NE	Yam		Newberg	OR	97132	503.538.8284			FALSE	TRUE	FALSE	
Chuck	Chimento		20980	SW	Rd		Sherwood	OR	97140			chimento@sterlink.net	TRUE	FALSE	FALSE	
Elmer	Christensen		24065	NE	ycres		Newberg	OR	97132	503.538.6932			FALSE	TRUE	FALSE	
Robyn	Christie		2124		pect		Newberg	OR	97132				FALSE	TRUE	FALSE	
Tim	Clark		No such address		Dr		Newberg	OR	97132	5035385904		no such email address	FALSE	FALSE	TRUE	
Tim	Clay		10100	NE	Rd		Newberg	OR	97132			tim.clay@serveron.com	TRUE	FALSE	FALSE	
Jan & Richard	Clay		31850	NE	dd		Newberg	OR	97132	503.537.4004		janicerclay@msn.com	TRUE	FALSE	FALSE	
Don	Clements		125	S	Rd		Newberg	OR	97132			rg	TRUE	FALSE	FALSE	
Marcia	Cobb		No such number							503 554.9033		no such email	FALSE	FALSE	FALSE	07/22/2008
Neil	Cohen				Box		Dundee	OR	97115			neroco2@comcast.net	TRUE	FALSE	FALSE	
Terry	Cole		455		rt Rd SE		Salem	OR	97301	503-986-2674		.us	TRUE	FALSE	FALSE	
Chris	Coleman	Coleman T. Inc.	5555	NE	mpo		St. Paul	OR	97137				FALSE	TRUE	FALSE	
Gregg & Liz	Colwell		13500	NE	ease		Newberg	OR	97132			gcolwell@pacifier.com	TRUE	FALSE	FALSE	
Betty	Cone		270		ans		Golden	CO	1950				FALSE	TRUE	TRUE	03/16/2009
Stacy	Connery		no such address					OR				no such email address	FALSE	FALSE	TRUE	04/22/2009
Martin	Construction		no such address					OR				no such email address	FALSE	FALSE	TRUE	04/22/2009
Donald & Doris	Cooke		23720	NE	ycres		Newberg	OR	97132	503 538.2861		no such email address	FALSE	TRUE	TRUE	08/18/2009
Nadia	Corder		3501	NE	Dr		Newberg	OR	97132				FALSE	TRUE	FALSE	
Scott & Sue	Corle		16150	NE	alem		Newberg	OR	97132			no such email	FALSE	TRUE	FALSE	
	Investments		901	N	cher	355	Newberg	OR	97132	805.797.4898			FALSE	TRUE	FALSE	
Geoff	Crook		635		ol St NE	0	Salem	OR	97301			no email address	FALSE	TRUE	FALSE	08/18/2009
Roger	Currier	City Council						OR				rcurrier@hevanet.com	TRUE	FALSE	FALSE	04/08/2008
Dave	Dailey		No such address	NE	am		Newberg	OR	97132	503.538.9387		drexdave@yahoo.com	TRUE	FALSE	TRUE	01/10/2008
Jerry	Dale				Box		Newberg	OR	97132				FALSE	TRUE	FALSE	
Sally	Dallas						Newberg	OR	97132			sally@newbergallery.com	TRUE	FALSE	FALSE	
Sally	Dallas		115	N	ge St		Newberg	OR	97132			sally@newbergallery.com	TRUE	FALSE	FALSE	
Joyce	Damman		30160	NE	amin		Newberg	OR	97132			gadamm2@cs.com	FALSE	TRUE	FALSE	
Gary	Damman		30160	NE	amin		Newberg	OR	97132				FALSE	TRUE	FALSE	
Dan	Danicic	City Council					Newberg	OR	97132			or.us	TRUE	FALSE	FALSE	
John & Patty	David		14450	NE	g		Newberg	OR	97132	503.538.7593			FALSE	TRUE	TRUE	07/23/2008
Brown	Dean		PO Box 3279				Newberg	OR	97132	5035382007		com	TRUE	FALSE	FALSE	
Krier	Del		8680	SE	Paul		Newberg	OR	97132	5035383460			FALSE	TRUE	FALSE	
Ray	Delude	Providence Medical Center	9205	SW	es		Portland	OR	97225	503-216-1234			FALSE	TRUE	FALSE	
Frank	Dennis		29550	NE	am		Newberg	OR	97132	503-538-0622			FALSE	TRUE	FALSE	
Cynthia	Denny	Construction	95	W	Aven		Eugene	OR	97132	541-684-4933			FALSE	TRUE	FALSE	11/21/2008
Charles	DeVoc		3231		nia		Newberg	OR	97132	503.538.4314		chinachas@comcast.net	TRUE	FALSE	FALSE	
William	Dickas	L.L.P.	520	SW	hill	e	Portland	OR	1329	503-222-3551		wdickas@kelrun.com	FALSE	TRUE	FALSE	
Ronald & Carol	Diehl		23430	NE	n Rd		Newberg	OR	97132				FALSE	TRUE	FALSE	
David & Linda	Dobbins		29830	NE	amin		Newberg	OR	97132	503.538.8042		lindob44@yahoo.com	TRUE	FALSE	FALSE	
Lee & Amy	Does		10730	NE	e Rd		Newberg	OR	97132				FALSE	TRUE	FALSE	
Michael & LaWanna	Douglas		11500	NE	Dr		Newberg	OR	97132				FALSE	TRUE	FALSE	
Mimi	Doukas	WRG Design	5415	SW	gate	100	Portland	OR	97221			mad@wrgd.com	TRUE	FALSE	FALSE	
Barbara & Brian	Doyle		24001	NE	Ln		Newberg	OR	97132				FALSE	TRUE	FALSE	
Derek	Duff	Planning Commission					Newberg	OR	97132			deduf@vestas.com	TRUE	FALSE	FALSE	
Kimberly	Dunn		4505	E	and		Newberg	OR	97132				FALSE	TRUE	TRUE	07/31/2008
Bruce & Christine	Eberle		10830	NE	enso		Newberg	OR	97132				FALSE	TRUE	FALSE	
Carrie	Eisenbrandt		137		Ct.		Newberg	OR	97132				FALSE	TRUE	TRUE	02/19/2009
Alice	Elbert		518	S	gbro		Newberg	OR	97132				FALSE	TRUE	FALSE	
Antonio	Elias		1812		St		Newberg	OR	97132				FALSE	TRUE	FALSE	
Margaret	Ellenson		3215	S	ooski		Newberg	OR	97132	5035374085		no such email address	FALSE	TRUE	TRUE	04/22/2009
Tyler	Ellenson		3215	S.	ooski		Newberg	OR	97132			m	TRUE	FALSE	FALSE	
Del	Ellis		28800	NE	Rd		Newberg	OR	97132				FALSE	TRUE	FALSE	
John	Ellis		24025	NE	n Rd		Newberg	OR	97132				FALSE	TRUE	FALSE	
Gordon & Sharon	Ellison		29935	NE	amin		Newberg	OR	97132	503.537.1120		no such email address	FALSE	TRUE	TRUE	03/28/2008
Jess & Christy	Emerson		29980	NE	am		Newberg	OR	97132				FALSE	TRUE	FALSE	
John	Estrem		8355	NE	tt Mtn		Newberg	OR	97132			no such email address	FALSE	TRUE	TRUE	
John	Ezell		23645	NE	240		Newberg	OR	97132	503.537.9417		no such email address	FALSE	TRUE	TRUE	03/28/2008
Sam	Farmer		1201	E	n	6	Newberg	OR	97132	503.538.8776		sfarmer@georgefox.edu	TRUE	FALSE	FALSE	
Patricia	Farrell						Newberg	OR				ninebark@juno.com	TRUE	FALSE	FALSE	
Steve	Fawver		1260	NE	alem		Newberg	OR	97132	503.538.4756			FALSE	TRUE	FALSE	
Gretchen	Fehrenbacher		1605	N	son		Portland	OR	97217				FALSE	TRUE	FALSE	

Rob	Felton		321		St		Newberg	OR	97132		rfelton@georgefox.edu	TRUE	FALSE	FALSE			
Diane	Ferranti		3816		ia		Newberg	OR	97132		divon62@aol.com	TRUE	FALSE	FALSE			
Glenn	Ferris		32678	NE	ll		Newberg	OR	97132			FALSE	TRUE	FALSE			
Joe & Betsy	Fettig		PO Box 546				Newberg	OR	97132		f.betsy@comcast.net	TRUE	FALSE	FALSE			
Kyle & Patty	Findley		1001	NE	alem		Newberg	OR	97132	503.538.5663	patty.findley@verizon.net	FALSE	TRUE	FALSE			
Kevin	Fish		3841		s St		Newberg	OR	97132	503.538.8653	kevinf@nwesi.com	TRUE	FALSE	FALSE			
Jim & Jacquie	Fisher		23225	NE	n Rd		Newberg	OR	97132	503.519.6670		FALSE	TRUE	FALSE			
Carrie & Allen	Fleming		11205	NE	ys Ln		Newberg	OR	97132		carriesue2@verizon.net	TRUE	FALSE	FALSE			
Roland & Goldie	Flock		30150	NE	wood		Newberg	OR	97132			FALSE	TRUE	FALSE			
Mary	Foster				Box		Newberg	OR	97132	503.538.6505	drensclinic.com	TRUE	FALSE	FALSE			
Lucia	Foster				Box		Newberg	OR	97132			FALSE	TRUE	FALSE			
Donna	Fouche		No Such Address				Newberg	OR	97132		no such email address	FALSE	FALSE	TRUE			
Debbie & Gene	Fournier		3856		Ct		Newberg	OR	97132	503.537.0960	cooksterf@juno.com	TRUE	FALSE	FALSE			
Joni	Fouts		23439	N	99W		Newberg	OR	97132	503.538.2969	jfouts@verizon.net	TRUE	FALSE	FALSE			
Tom	Fox		745		merci NE		Salem	OR	97301		tom.j.fox@state.or.us	TRUE	FALSE	FALSE			
Alan	Fox		885		rt Rd SE	P	Salem	OR	97301			FALSE	TRUE	FALSE			
Bruce	Freeman		4312	NE	Dr		Newberg	OR	97132	503 538.7084	t	FALSE	TRUE	FALSE			
Berklee	Freeman		29410	NE	onvill		Newberg	OR	97132			FALSE	TRUE	FALSE			
Dan	Fricke		455		rt Rd SE	B	Salem	OR	97301			FALSE	TRUE	FALSE			
Ken	Friday		525	NE	St		McMinnville	OR	97128	503.434.7516		FALSE	TRUE	FALSE			
Sid	Friedman	1000 Friends of Oregon	189		ty St NE	A	Salem	OR	97301		sid@friends.org	TRUE	FALSE	FALSE			
Jubal	Frost		901	N	cher	1	Newberg	OR	97132	5035380404	jubalfrost@g.com	TRUE	FALSE	FALSE			
Chet & Pam	Fryjoff		29501	NE	Ln		Newberg	OR	97132	503.554.0812	fryjoff@comcast.net	TRUE	FALSE	FALSE			
Arnie	Fuchs		No Such Address	S	gbro		Newberg	OR	97132			FALSE	FALSE	TRUE	02/23/2009		
Julie	Fugate		14500	NE	ard		Newberg	OR	97132	503-522-1900	juliefugate@kw.com	TRUE	FALSE	FALSE			
	Living Trust		PO BOX 1057				Newberg	OR	97132			FALSE	TRUE	TRUE	11/21/2008		
Dennis	Gaibler		9680		Rd		Wilsonville	OR	97070	503.694.1093	dgaibler@comcast.net	TRUE	FALSE	FALSE	02/25/2009		
Walt	Gaibler		1301	E	n	130	Newberg	OR	97132	503.550.7533		FALSE	TRUE	FALSE			
Peggy	Gainer		19098	NE	240		Newberg	OR	97132	503.537.0620		FALSE	TRUE	FALSE			
Mary Ann	Galloway		23990	NE	e		Newberg	OR	97132			FALSE	TRUE	FALSE			
Victor	Gamble		14475	NE	Hill		Newberg	OR	97132	503.538.1231	no such email address	FALSE	TRUE	TRUE	05/28/2008		
Gloria	Gardner	Dept of Land Conservation	635		TOL NE	15	SALEM	OR	25		s	FALSE	TRUE	FALSE			
Jennifer	Gartner		8630	NE	Ridg		Newberg	OR	97132	503.538.5176		FALSE	TRUE	FALSE			
Ron & Teresa	Gaylord		10695	NE	e Rd		Newberg	OR	97132			FALSE	TRUE	FALSE			
John	Geinauer		no such address				Newberg	OR	97132		no such email address	FALSE	FALSE	TRUE	04/22/2009		
Kathy	George		535	E	St		McMinnville	OR	97128		georgek@co.yamhill.or.us	TRUE	FALSE	FALSE			
Matt	Gib		31909		l		Newberg	OR	97132	503.537.9192		FALSE	TRUE	FALSE			
William A.	Gille, P.E.	YC Public Works	2060		ette		McMinnville	OR	97128	503-434-7515		FALSE	TRUE	TRUE			
Jon	Globig		PO Box 1075				Newberg	OR	97132		globigj@yahoo.com	FALSE	TRUE	FALSE			
Monte	Glud		no such number				Newberg	OR	97132		no such email address	FALSE	FALSE	TRUE			
John & Rebecca	Goad		23775	NE	ycres		Newberg	OR	97132			FALSE	TRUE	FALSE			
Lisa	Gohman						Newberg	OR	97132		lgohman@theiatech.com	TRUE	FALSE	FALSE			
Manuel & Brenda	Gonzalez		no such number				Newberg	OR	97132	503.537.0281	no email provided	FALSE	FALSE	TRUE	02/04/2008		
Nadia	Gorder		3501	NE	Dr		Newberg	OR	97132			FALSE	TRUE	FALSE			
Mike	Gougler		4729		ers		Newberg	OR	97132		ggoug@comcast.net	TRUE	FALSE	FALSE			
Roger	Grahn		23287		lle		Sherwood	OR	97140			FALSE	TRUE	FALSE			
Connie	Gray		8980	NE	Paul		Newberg	OR	97132			FALSE	TRUE	FALSE			
Norma	Green				am		Newberg	OR	97132	503.538.3793	no email provided	FALSE	FALSE	TRUE			09/03/2008
Genelle	Gregg		704		urst		Newberg	OR	97132		no such email address	FALSE	TRUE	TRUE			
Rene	Gronli							OR			il.com	TRUE	FALSE	FALSE			
David	Grove							OR			davidgrove@comcast.net	TRUE	FALSE	FALSE	01/02/2009		01/02/2009
Ron	Guillory				Box		Hillsboro	OR	97123		rmguillory@verizon.net	TRUE	FALSE	FALSE			01/28/2008
Michael	Gunn		PO BOX 162				Dundee	OR	97115	503-538-8285		FALSE	TRUE	TRUE	02/28/2009		
Judith	Guy		28925	SW	hollo		Hillsboro	OR	97123	503 628.1690		FALSE	TRUE	FALSE			
Everett & Shirley	Hackworth		24015	NE	e		Newberg	OR	97132			FALSE	TRUE	FALSE			
Greg	Haffner		31181	NE	l		Newberg	OR	97132			FALSE	TRUE	FALSE			
Johnna	Haffner		31181	NE	l		Newberg	OR	97132			FALSE	TRUE	FALSE			
Donald & Crystal	Hall		905	W	dan		Newberg	OR	97132			FALSE	TRUE	FALSE			
Bruce	Hall	Willamette Farms of Oregon	8000	NE	sh		Newberg	OR	97132	503-554-0965		FALSE	TRUE	FALSE			
Dave	Halsey	Halsey Resources LLC	51		aldi		Lake Oswego	OR	97035	503 519.9691		FALSE	TRUE	FALSE	12/07/2007		
Ron	Halstead		2301		Ct.		Newberg	OR	97132		no such email address	FALSE	TRUE	TRUE	04/22/2009		
Alan	Halstead						Newberg	OR	97132		hlstdalp@yahoo.com	TRUE	FALSE	FALSE			
Alan	Halstead		119		ey		Newberg	OR	97132		no such email address	FALSE	TRUE	TRUE	04/22/2009		
James R.	Hanks, PE	JRH	4765		e	e	Eugene	OR	97401	541-687-1081		FALSE	TRUE	FALSE	12/07/2007		
Jon & Darlene	Harinah		918		yfield		Henderson	NV	89015	702 596.0758	dartvl@aol.com	TRUE	FALSE	FALSE			
Marvin	Hanson							OR			scout45-70@comcast.net	TRUE	FALSE	FALSE			
David	Harle		22230	SW	rs dr		Tualatin	OR	97062			FALSE	TRUE	FALSE			
Doug	Harnar		901	N.	cher	1	Newberg	OR	97132	5035380404		FALSE	TRUE	FALSE			

News of Newberg's Future
Effective 11/6/2009
Newberg Future MASTER

Charles	Harrell	Gunn Cain & Kinney LLP	700		rah	250	Newberg	OR	97132	503.538.8318	m	TRUE	FALSE	FALSE	09/02/2008	
Dan & Michelle	Harrington		23300	SW	Peak		Hillsboro	OR	97123			FALSE	TRUE	FALSE		
Matson	Haug						Newberg	OR	97132		m	TRUE	FALSE	FALSE		
Matson	Haug		1524		Cree		Newberg	OR	97132		m	TRUE	FALSE	FALSE		
Sonja	Haugen				Box		Newberg	OR	97132		com	TRUE	FALSE	FALSE		
Erik	Havig, P.E.	Department of Transportation	455		rt Rd SE	B	Salem	OR	97301	503 986.2600		FALSE	TRUE	FALSE		
Jane & Russ	Heater		29321	NE	amin		Newberg	OR	97132	503.538.4933		FALSE	TRUE	FALSE		
Chuck	Heath		29465	NE	am		Newberg	OR	97132	503.538.2334		FALSE	TRUE	FALSE		
Vickie	Heath		No such address				Newberg	OR	97132	503.538.2334	no email provided	FALSE	FALSE	TRUE	02/28/2009	
Cristen	Henley		30475	NE	s Ln		Newberg	OR	97132	503.538.7804	no such email address	FALSE	TRUE	TRUE		
Pam	Hermanson		31187	NE	l		Newberg	OR	97132			FALSE	TRUE	FALSE		
John & Margaret	Hickert		16255	SW	Chari		King City	OR	97224	503.624.9403		FALSE	TRUE	FALSE		
Marvin & Jandell	Hines		No such address							503.538.6339	no email provided	FALSE	FALSE	TRUE	01/08/2008	
Don	Hodydon		28570	NE	onvill		Newberg	OR	97132	5035381481	flyingharvest@yahoo.com	FALSE	TRUE	FALSE		
Don	Holland		24315	NE	240		Newberg	OR	97132	503.554.0907	dlholland1@verizon.net	FALSE	TRUE	FALSE		
Shelly	Holly		700	NE	oma	0	Portland	OR	97232	503.963.7003	sholly@parametrix.com	TRUE	FALSE	FALSE		
Jon	Holt		3723		s St		Newberg	OR	97132	503.538.1471	jonholt@verizon.net	TRUE	FALSE	FALSE		
Charlie & Debbie	Holton		1400	NE	alem		Newberg	OR	97132	503.538.8565		FALSE	TRUE	FALSE		
Allan & Carla	Hopp		24200	NE	ns		Newberg	OR	97132			FALSE	TRUE	FALSE		
Barry & Kris	Horn		610	E	dan		Newberg	OR	97132		bear503@pacifier.com	TRUE	FALSE	FALSE		
Pat	Horton		32305	NE	Parre		Newberg	OR	97132			FALSE	TRUE	FALSE		
Gary	Host		29945	NE	amin		Newberg	OR	97132	503.538.2940		FALSE	TRUE	FALSE		
Sally	Howes		812	NE	dan		Newberg	OR	97132		trashly.manor@gte.net	TRUE	FALSE	FALSE		
Joe	Hughes		31205	NE	ad		Newberg	OR	97132	503.624.7100	om	TRUE	FALSE	FALSE		
Jim & Margaret	Humpres		29440	NE	amin		Newberg	OR	97132	503.538.5050		FALSE	TRUE	FALSE		
Bronwen	Hunt		No such address				Newberg	OR	97132	503.538.5094	no email provided	FALSE	FALSE	FALSE	02/12/2008	
Chris	Hunt		No such address				Newberg	OR	97132	503.538.5094	no email provided	FALSE	FALSE	FALSE	02/12/2008	
Fran & Dave	Hunter		30050	NE	amin		Newberg	OR	97132	503.538.4266	vegas64@comcast.net	TRUE	FALSE	FALSE		
Robert	Hurford		1105	N	Ave		Newberg	OR	97132			FALSE	TRUE	FALSE		
Garren	Ingram				Box		Sherwood	OR	97140	503-692-0229		FALSE	TRUE	FALSE		
Francis	Jackson		No such address	NE	wood		Newberg	OR	97132	503-538-4459	no email provided	FALSE	FALSE	TRUE	01/11/2008	
Irene & Charles	Jackson		31339	NE	l		Newberg	OR	97132	503.538.5462		FALSE	TRUE	FALSE		
Jeffrey	Jackson		281		l Oak		Newberg	OR	97132	503.804.9804		FALSE	TRUE	TRUE	02/12/2008	
Tammy	Jacobs		23400	NE	240		Newberg	OR	97132	503.538.8100		FALSE	TRUE	FALSE		
Paul	Jellum							OR			no email provided	FALSE	FALSE	FALSE	02/28/2009	04/21/2009
David	Jensen		14791	NE	d Ct		Newberg	OR	97132	503.538.2252		FALSE	TRUE	FALSE		
John	Jensen Jr		8630	NE	Paul		Newberg	OR	97132	503.554.8997		FALSE	TRUE	FALSE		
Saj	Jivanjee		32230	NE	Parre		Newberg	OR	97132	503-970-0326		FALSE	TRUE	FALSE		
James	Johnson		635		ol St	150	Salem	OR	2540	503 373.0050	no email provided	FALSE	FALSE	FALSE		05/09/2008
Carrie	Jones		13340	NE	el Rd		Newberg	OR	97132	503.538.2031	cmjstormy72@yahoo.com	TRUE	FALSE	FALSE		
Dennis & Carrie	Jones		13340	NE	el Rd		Newberg	OR	97132	503.538.2031		FALSE	TRUE	FALSE		
Ralph	Jumago							OR			rjumago@msn.com	TRUE	FALSE	FALSE		
Hal	Kafka		29550	NE	d Ln		Newberg	OR	97132		no such email address	FALSE	TRUE	TRUE	08/14/2009	
Janice	Kaprowski		13700	NE	Shor		Newberg	OR	97132			FALSE	TRUE	FALSE		
Joe	Keizur		11815	NE	St	0	Vancouver	OR	98682	503.758.2631	no such email address	TRUE	FALSE	FALSE		
James & Carolyn	Keller		217		Hwy	36	Newberg	OR	97132			FALSE	TRUE	FALSE		
Cecily	Kelly							OR			cecilyk@aol.com	TRUE	FALSE	FALSE		
Sheryl	Keish							OR			rg	TRUE	FALSE	FALSE		
Brian & Beth	Keyser		1400		ins		Newberg	OR	97132		bkeyser777@comcast.net	TRUE	FALSE	FALSE		
Ruth	Kilgore		8625	NE	Paul		Newberg	OR	97132	503 538.3590		FALSE	TRUE	FALSE		
Chuck	Kimball							OR			no such email address	FALSE	FALSE	TRUE	08/14/2009	
Dr. R	Kimball		69377		e		Burns	OR	97720			FALSE	TRUE	FALSE		
Dollie	King		9300	NE	sh		Newberg	OR	97132			FALSE	TRUE	FALSE		
Lee	Klampe		1220		St SE		Salem	OR	97302			FALSE	TRUE	FALSE		
Bob & Kathy	Knowles		29655	NE	amin		Newberg	OR	97132	503.538.5935	robkath@msn.com	TRUE	FALSE	FALSE		
Ron	Knox		31152	NE	l		Newberg	OR	97132	503.538.2506	filbertfarm@verizon.net	TRUE	FALSE	FALSE		
Gregg	Koskela		1225	NE	alem		Newberg	OR	97132	503.538.0802	gkoskela@gmail.com	TRUE	FALSE	FALSE		
Erika	Kriebel		22812	W.	Drive		West Linn	OR	0261			FALSE	TRUE	TRUE	02/19/2009	
Gordon	Kroemer		29950	NE	onvill		Newberg	OR	97132	503.538.2307	kroemer2@verizon.net	FALSE	TRUE	FALSE		
Linda	LaHente		3004	NE	Zimri		Newberg	OR	97132			FALSE	TRUE	FALSE		
Brent	Lam		28300	NE	Rd		Newberg	OR	97132	503.538.3320	moxiemoney@yahoo.com	FALSE	TRUE	TRUE	02/04/2008	
Mike	Lambert							OR			mlamb@onlinemac.com	TRUE	FALSE	TRUE	01/29/2008	
Kathy	Lambert		5501	NE	n		McMinnville	OR	97128		mlamb@onlinemac.com	TRUE	FALSE	TRUE	05/12/2008	
Joe	Landes		1213	NE	alem		Newberg	OR	97132		landesjoe@yahoo.com	TRUE	FALSE	FALSE		
Kim	Lanier		3701		Oak		Newberg	OR	97132		no such email address	FALSE	TRUE	TRUE		
Matt	Larabie							OR			office@resginc.com	TRUE	FALSE	FALSE		
Bob	Larson	City Council	2902	E	St	27	Newberg	OR	97132		r.us	TRUE	FALSE	FALSE	t0/27/2008	
John	Lawson		500	N	eld		Newberg	OR	97132			FALSE	TRUE	FALSE		

Paul	Lemman		812	W	dan		Newberg	OR	97132		no such email address	FALSE	TRUE	TRUE	
Dawn	Lenard		608	E	St		Newberg	OR	97132			FALSE	TRUE	FALSE	
Leslie	Lewis						Newberg	OR	97132		Lewisl@co.yamhill.or.us	TRUE	FALSE	FALSE	
Dennis	Lewis		29530	NE	Ln		Newberg	OR	97132	503.538.6817	dennis@lewisav.com	TRUE	FALSE	FALSE	
Leslie	Lewis		535	E	St		McMinnville	OR	97128		lewisl@co.yamhill.or.us	TRUE	FALSE	FALSE	
Gene	Lile		8240	NE	Ridg		Newberg	OR	97132	503.538.5463		FALSE	TRUE	FALSE	
Jaime	Lim		4904	E	and		Newberg	OR	97132		jaimelim@juno.com	TRUE	FALSE	FALSE	
Jaime	Lim		922	N	gswo		Portland	OR	97217			FALSE	TRUE	FALSE	
Erik & Heather	Linvog		10890	NE	e Rd		Newberg	OR	97132			FALSE	TRUE	FALSE	
Paul	Long		29380	NE	Ln		Newberg	OR	97132	503.538.1070	paul.long@comcast.net	TRUE	FALSE	FALSE	
Bruce	Longstroth		2033	NE	alem		Newberg	OR	97132	503.538.8653	com	TRUE	FALSE	FALSE	
Bruce	Lovejoy		14650	NE	gbro		Newberg	OR	97132	503.537.1159		FALSE	TRUE	FALSE	
Don	Loving		29265	NE	amin		Newberg	OR	97132	503.538.0793	oresports@aol.com	TRUE	FALSE	FALSE	
Linda	Lowe		23350	N	way		Newberg	OR	97132			FALSE	TRUE	TRUE	07/23/2008
Mort & Barbara	Lowe		25935	NE	Valle		Newberg	OR	97132			FALSE	TRUE	FALSE	
John & Priscilla	Lowery		30100	NE	amin		Newberg	OR	97132	503.538.8063	jpcilla@verizon.net	TRUE	FALSE	FALSE	
John & Georgeta	Lucescu		25240	NE	Valle		Newberg	OR	97132	503.476.4617		FALSE	TRUE	FALSE	
Jerrie & Becky	Lyda		No such address	N	ek Ln		Newberg	OR	97132		no email provided	FALSE	FALSE	TRUE	01/10/2008
Erin	Maerz		11220	NE	g Ln		Newberg	OR	97132		erinwou@hotmail.com	TRUE	FALSE	FALSE	
Krista & Karl	Maerz		11220	NE	g Ln		Newberg	OR	97132	503-538-4499		FALSE	TRUE	FALSE	
Terry	Mahr	City Council					Newberg	OR	97132		.us	TRUE	FALSE	FALSE	
Craig & Anna	Major		14788	NE	d Ct		Newberg	OR	97132			FALSE	TRUE	FALSE	
Kent	Malaput		23485	NE	n Rd		Newberg	OR	97132			FALSE	TRUE	FALSE	
Jon	Manqis		920		lee	SE	Salem	OR	97306	503.585.1676	mangisja@aol.com	FALSE	TRUE	FALSE	
Rowena	Marks		23520	NE	n Rd		Newberg	OR	97132	503.538.7769		FALSE	TRUE	FALSE	
Jack	Marontate		12128		y Ln		Newberg	OR	97132	503.538.8645		FALSE	TRUE	FALSE	
Allan	Martell		29955	NE	amin		Newberg	OR	97132	503.538.9082		FALSE	TRUE	FALSE	
Jay & Bridget	Martin		3870		s St		Newberg	OR	97132	503.538.1471	no such email address	FALSE	TRUE	TRUE	
Gary	Martin		22956	NW	er		Yamhill	OR	97148		t	TRUE	FALSE	FALSE	
Mark	Martin		125	S	Rd		Newberg	OR	97132			FALSE	TRUE	FALSE	
Iona	Martinson		8625	NE	Paul		Newberg	OR	97132			FALSE	TRUE	FALSE	
Deborah J	Matthew		24215	NE	Ln		Newberg	OR	97132		n.net	TRUE	FALSE	FALSE	
Keith & Valerie	Maxell		23755	NE	n Rd		Newberg	OR	97132		knvmaxwell@msn.com	TRUE	FALSE	FALSE	
Gary	Mays		29801	NE	am		Newberg	OR	97132	503.554.0335	poenan@aol.com	FALSE	TRUE	FALSE	
Mike	McBride		No such address		e Ln		Newberg	OR	97132		no email provided	FALSE	FALSE	TRUE	01/10/2008
Cheryl	McCaffrey		7425		ood		Newberg	OR	97132			FALSE	TRUE	FALSE	
Tami & Stacy	McClellan		14740	NE	d Ct		Newberg	OR	97132	503.538.8477	com	TRUE	FALSE	FALSE	
Charles & Ellen	McClure		30295		99W		Newberg	OR	97132	503.538.4606	chuck@nutfarm.com	TRUE	FALSE	FALSE	
Eileen	McCombs				Box		Newberg	OR	97132	503.538.1766		FALSE	TRUE	FALSE	
Susan	McDermitt		3301	NE	Dr		Newberg	OR	97132			FALSE	TRUE	FALSE	
Monte & Phyllis	McKane		3000		amin		Newberg	OR	97132	503.538.7811		FALSE	TRUE	FALSE	
Stephen	McKinney	City Council					Newberg	OR	97132		wberg.or.us	TRUE	FALSE	FALSE	08/14/2009
Larry	Meadows		No such address							503.538.6143	no email provided	FALSE	FALSE	FALSE	06/12/2008
David	Mehler		402	N	ol		Newberg	OR	97132		no such email address	FALSE	TRUE	TRUE	
Richard	Meissner		13445	NE	Hollo		Newberg	OR	97132	503-538-0926	no such email address	FALSE	TRUE	TRUE	08/24/2009
Alan & Barbara	Meyer		4000	N	n		Newberg	OR	97132		no such email address	FALSE	TRUE	TRUE	04/22/2009
Fred & Laurie	Meyer		3701	NE	Dr		Newberg	OR	97132	503.538.7825		FALSE	TRUE	FALSE	
Marcia	Mikesh		301		hurst		Newberg	OR	97132		architect.com	TRUE	FALSE	FALSE	
Mary Martin	Miller	Keller Williams Realty	9200	SE	ybroo	450	Newberg	OR	97132	503-336-6410	om	TRUE	FALSE	FALSE	
Elvin	Mills		14615	NE	gbro		Newberg	OR	97132			FALSE	TRUE	FALSE	
Nancy	Mills		14589	NE	gbro		Newberg	OR	97132	503.538.6470		FALSE	TRUE	FALSE	
Galen	Mines		8380	NE	Ridg		Newberg	OR	97132	503.554.9961		FALSE	TRUE	FALSE	
Kayda	Mitchell		14875	NE	en		Newberg	OR	97132	503.538.9256		FALSE	TRUE	FALSE	
Kelly	Moen				Box		Newberg	OR	97132			FALSE	TRUE	FALSE	
Dave	Monson		8820	NE	Paul		Newberg	OR	97132		davlorn@easystreet.net	FALSE	TRUE	TRUE	02/25/2009
Steve	Morasch		700	N	hingt	701	Vancouver	OR	98660			FALSE	TRUE	FALSE	
Bob & Jane	Mosher		2716	E	rts		Newberg	OR	97132			FALSE	TRUE	FALSE	
Gary	Murdoch		23950	NE	n Rd		Newberg	OR	97132	503 330.6893	resti9W@verizon.net	TRUE	FALSE	FALSE	
Keith	Nakayama		5390	SE	n Dr		Portland	OR	97267	503.659.9556	primeprop@comcast.net	TRUE	FALSE	FALSE	
Chris	Nash		31655	NE	onvill		Newberg	OR	97132			FALSE	TRUE	FALSE	
Jerold	Neill		no such address		ek Ln		Newberg	OR	97132		no email provided	FALSE	FALSE	TRUE	05/08/2008
Dixie	Nelson		400		e Ln		Newberg	OR	97132	503.538.3298		FALSE	TRUE	FALSE	
Karen	Nelson		1220		St	SE	Salem	OR	97302			FALSE	TRUE	FALSE	
Terry & Sharon	Nelson		14125	NE	n Rd		Newberg	OR	97132	503.554.1167		FALSE	TRUE	FALSE	
Jeff	Neville		311	N	lan		Newberg	OR	97132			FALSE	TRUE	FALSE	
	Garbage &				Box		Newberg	OR	97132			FALSE	TRUE	FALSE	
Jill & Fred	Newton		No such address							503.625.2590	no email provided	FALSE	FALSE	TRUE	12/07/2007
Larry	Nibler		15495	NE	ry Rd		Newberg	OR	97132	503.554.1729		FALSE	TRUE	FALSE	

News of Newberg's Future
Effective 11/6/2009
Newberg Future MASTER

Akira	Nishioka						Newberg	OR	97132		aynishioka_2@msn.com	TRUE	FALSE	FALSE	12/31/2007		
David	Noren				Box		Hillsboro	OR	97123		net	TRUE	FALSE	FALSE			
Mike	Norkitis		3221	N	St		Newberg	OR	97132		mnorkitis@hotmail.com	TRUE	FALSE	FALSE			
Victoria	Norlen		No such address				Newberg	OR	97132	503.537.5472	no email provided	FALSE	FALSE	TRUE	12/31/2007		
Jessica	Nunley	City of Newberg						OR			g.or.us	TRUE	FALSE	TRUE			
Joe & Jamie	Ohalloran		14495	NE	n Rd		Newberg	OR	97132		johallo360@aol.com	TRUE	FALSE	FALSE			
Steve	Olson	City of Newberg						OR			or.us	TRUE	FALSE	FALSE			
Mel	Olson		No such address				Newberg	OR	97132		no email provided	FALSE	FALSE	TRUE	04/07/2008		
John	O'Neil						Newberg	OR	97132	5035977100	om	TRUE	FALSE	FALSE	07/21/2008		
Paddy & Teresa	O'Neil		14455	NE	Hill		Newberg	OR	97132	503.538.8042		FALSE	TRUE	FALSE			
Seth	Otto		5415	SW	gate	100	Portland	OR	97221		seth.otto@wrgdesign.com	TRUE	FALSE	FALSE			
Steve	Oulman	Dept. of Land Conservatio	635	NE	ol St.	e	Salem	OR	97301		s	TRUE	FALSE	FALSE	05/12/2008		
John	Owen		PO Box 43				Dundee	OR	97115		jowen@equitygroup.com	TRUE	FALSE	FALSE			
Erik	Pahlow		No such address		ard		Newberg	OR	97132		no email provided	FALSE	FALSE	TRUE	12/31/2007		
Jeff	Palmer	City Council						OR			no such email address	FALSE	FALSE	TRUE	08/14/2009		
Derrie	Palmer				Box		Newberg	OR	97132			FALSE	TRUE	FALSE			
Jamie	Parks	Kittleson & Associates, Inc.	610	SW	St	700	Portland	OR	97205	503-228-5230	jparks@kittelson.com	FALSE	TRUE	FALSE			
Evelyn	Parlette		23800	NE	Yam		Newberg	OR	97132	503.538.1613		FALSE	TRUE	FALSE			
Jimmy & Mary	Parrack		2440	NE	Ln		Newberg	OR	97132			FALSE	TRUE	FALSE			
Warren	Parrish						Newberg	OR	97132		wmparrish1@verizon.net	TRUE	FALSE	FALSE			
Warren	Parrish		30450	NE	onvill		Newberg	OR	97132		wmparrish1@verizon.net	TRUE	FALSE	FALSE	03/28/2008		
Elyane & AC	Parson		1955		lake		Newberg	OR	97132	503.538.8554		FALSE	TRUE	FALSE			
Dick	Patrone						Newberg	OR	97132	503-538-9435	no such email address	FALSE	FALSE	TRUE			02/04/2008
Ron	Peddicord		No such Address	N	cher	200	Newberg	OR	97132	503.550.0188		FALSE	FALSE	TRUE	11/03/2008		
Dorothy	Pekkola		1735	NW	ows		McMinnville	OR	97128			FALSE	TRUE	FALSE			
Rod	Pelling				Box		Newberg	OR	97132	503-538-1252		FALSE	TRUE	FALSE			
Luke	Pelz							OR			us	TRUE	FALSE	FALSE			
Geoffrey	Pement							OR			com	TRUE	FALSE	FALSE			
Ronald	Pepin		5456		wick		Anaheim		92807		ronginpep@sbcglobal.net	TRUE	FALSE	FALSE			
lisa	Perse		PO Box 1083				McMinnville	OR	97128			FALSE	TRUE	FALSE			
Alan	Peterson		32500	NE	l		Newberg	OR	97132		alan@alanpeterson.net	TRUE	FALSE	FALSE			
Harry	Peterson		31180	NE	as		Newberg	OR	97132		com	TRUE	FALSE	FALSE			
Dick	Petrone		4301	NE	view		Newberg	OR	97132		no email provided	FALSE	FALSE	FALSE			02/04/2008
Dave	Petry		29375	NE	am		Newberg	OR	97132	503.537.5049		FALSE	TRUE	FALSE			
Betty & Steve	Philes		1205	NE	alem		Newberg	OR	97132	503.538.5096	sbphiles@aol.com	TRUE	FALSE	FALSE			
Mike	Phillips		4104	NE	Dr		Newberg	OR	97132	503.554.5420	liates.com	FALSE	TRUE	FALSE			
Brian & Pamela	Pierce		24339	NE	on		Newberg	OR	97132		net	FALSE	TRUE	FALSE			
J D & Edith	Pierce				Box		Dundee	OR	97115			FALSE	TRUE	FALSE			
Janice & Dennis	Pierce		30690	NE	wood		Newberg	OR	97132		janmpierce@aol.com	TRUE	FALSE	FALSE			
Gene	Piros		2700		orth	38	Newberg	OR	97132		ghpiros@msn.com	TRUE	FALSE	FALSE			
Patricia	Pleus		23630	NE	ns		Newberg	OR	97132	503.349.5720		FALSE	TRUE	FALSE			
Dave & Marion	Pratt		14550	NW	g		Newberg	OR	97132	503.538.2872		FALSE	TRUE	FALSE			
Mike	Proctor		20540	NW	Hollo		Portland	OR	97229		et	TRUE	FALSE	FALSE			
Niel	Rader		3312	NE	wood		Newberg	OR	97132			FALSE	TRUE	FALSE			
Roger	Rader		1320	NE	alem		Newberg	OR	97132	503.538.4882		FALSE	TRUE	FALSE			
Dr. Paula	Radich	Newberg School District 29J	714	E	St		Newberg	OR	97132	503 554.5000	us	TRUE	FALSE	FALSE			
Gerrick	Ransky						Newberg	OR	97132		gkransky@gmail.com	TRUE	FALSE	FALSE			
Jack	Reardon		3896		Mead		Newberg	OR	97132		j.reardon8@comcast.net	TRUE	FALSE	FALSE			
Merilyn	Reeves							OR			merilynreeves@aol.com	TRUE	FALSE	FALSE			
Larry	Renne		10350	NE	e Rd		Newberg	OR	97132			FALSE	TRUE	FALSE			
	Resident		2023	NE	alem		Newberg	OR	97132	503.537.1054		FALSE	TRUE	FALSE			
TeAnna	Rice	Planning Commission					Newberg	OR	97132		.com	TRUE	FALSE	FALSE			
Dannie & Teri	Rich		11960	NE	y Ln		Newberg	OR	97132	503 537.5029	roken89@aol.com	TRUE	FALSE	FALSE			
Bart	Rierson	City Council						OR			or.us	TRUE	FALSE	FALSE	12/27/2007		
Mischelle	Rierson		110		Inut		Newberg	OR	97132			FALSE	TRUE	FALSE			
Hadley	Robbins		7090	SW	am		Portland	OR			robbins4152@msn.com	TRUE	FALSE	FALSE			
Jeff	Roberts		1800	NW	h Pl	150	Beaverton	OR	97006	503.349.5279	jeff@crandallgroup.com	TRUE	FALSE	FALSE			
Michael	Robinson	Perkins Cole	1120	NW	h St	Fl	Portland	OR	4128	503-727-2264	om	FALSE	TRUE	FALSE			
Courtney	Rogers		No such address				Newberg	OR	97132		no such email address	FALSE	FALSE	TRUE	06/13/2008		
Rick	Rogers				Box		Newberg	OR	97132		rlrckrogers@comcast.net	TRUE	FALSE	FALSE			
Rob & Dorothy	Roholt		31150	NE	ad		Newberg	OR	97132	503-538-6830	rroholt@verizon.net	TRUE	FALSE	FALSE			
Jim	Ronning		29895	NE	onvill		Newberg	OR	97132			FALSE	TRUE	FALSE			
Bill	Rosacker		29190		song		Newberg	OR	97132			FALSE	TRUE	FALSE			
Bill	Rourke		4016	N	ge St		Newberg	OR	97132	503.538.5567	no such email address	FALSE	TRUE	TRUE			
Marks	Rowena		23520	NE	ns		Newberg	OR	97132			FALSE	TRUE	FALSE			
Jeanine	Rustad		310	SW	h	0	Portland	OR	97204		no such email address	FALSE	TRUE	TRUE	04/22/2009		
Kelley	Rustrum		29105	NE	amin		Newberg	OR	97132			FALSE	TRUE	FALSE			
Leonard	Rydell		601		hurst		Newberg	OR	97132		larydell@teleport.com	TRUE	FALSE	FALSE			

News of Newberg's Future
Effective 11/6/2009
Newberg Future MASTER

Garth	Rylands		23755	NE	n Rd		Newberg	OR	97132	503.538.2199		FALSE	TRUE	FALSE		
Steve	Rymer							OR		503.661.1244	leathers@teleport.com	TRUE	FALSE	FALSE		
Rick	Sanai						Newberg	OR	97132		no email provided	FALSE	FALSE	FALSE		
Steve	Santos		635		ol St NE	150	Salem	OR	97301		no email provided	FALSE	FALSE	FALSE		05/09/2008
Karen	Saunders		3850		Drive		Newberg	OR	97132			FALSE	TRUE	FALSE		
Todd	Saunders				Box		Dundee	OR	97115	503.537.9950	com	TRUE	FALSE	FALSE		
Benjamin	Schaad		3320		ngto		Newberg	OR	97128			FALSE	TRUE	FALSE		
Grace	Schaad		31525	NE	ad		Newberg	OR	97132	503.538.2006		FALSE	TRUE	FALSE		
Lewis	Schaad		31655	NE	ad		Newberg	OR	97132	503-537-9285		FALSE	TRUE	FALSE		
Richard	Schaad		31600	NE	Paret		Newberg	OR	97132	503.538.7364		FALSE	TRUE	FALSE		
S	Schaad				Box		Tigard	OR	97281			FALSE	TRUE	FALSE		
Thomas K	Schaad		610	SW	Dr		Dundee	OR	97115	503-789-7404		FALSE	TRUE	FALSE		
Herb & Kim	Schaffner		32400	NE	Paret		Newberg	OR	97132	503.554.6826		FALSE	TRUE	FALSE		
Dennis	Scheuermann		281		e		Newberg	OR	97132		kelsey_2000@msn.com	TRUE	FALSE	FALSE		
Joe	Schiewe	The Saunders CO.	3850	N	Dr.		Newberg	OR	97132			FALSE	TRUE	FALSE		
Gregg	Scholz		31139	NE	i		Newberg	OR	97132	503-538-9776	gscholz@rweng.com	TRUE	FALSE	TRUE	01/29/2008	
John & Sandy	Schmidt		29600	NE	d Ln		Newberg	OR	97132			FALSE	TRUE	FALSE		
Eric	Schoenborn				Box		Amity	OR	97101	503.538.5359		FALSE	TRUE	TRUE	02/12/2008	
Dave	Scott		24625	NE	ming		Newberg	OR	97132	503.538.0204	scottfam777@verizon.net	TRUE	FALSE	FALSE		
Doug	Seeber				Box		Newberg	OR	97132		seek1973@aol.com	TRUE	FALSE	FALSE		
Greg	Seidel		no such address				Newberg	OR	97132	503.925.1829	no such email address	FALSE	FALSE	TRUE	04/22/2009	
Rhonda & Richard	Senz		27100	NE	Rd		Newberg	OR	97132	503.538.4079		FALSE	TRUE	FALSE		
Marc	Shelton	City Council					Newberg	OR	97132		.or.us	TRUE	FALSE	FALSE		
Vicki	Shepherd		30230	NE	amin		Newberg	OR	97132	503.538.9466	dvshepherd@verizon.net	TRUE	FALSE	FALSE	06/09/2008	
Corinne	Sherton		247		merci	e	Salem	OR	97301	503-391-7446	sherton@teleport.com	TRUE	FALSE	FALSE		
Michael	Sherwood						Newberg	OR	97132		n.net	TRUE	FALSE	FALSE		
Michael	Sherwood		535	E	St		McMinnville	OR	97128		n.net	TRUE	FALSE	FALSE		
Lane	Shetterly		189	SW	emy		Dallas	OR	97338		lane@siso-law.com	FALSE	TRUE	FALSE		
Nathan	Shielee		No such number							503.554.6650	no email provided	FALSE	FALSE	TRUE	12/07/2007	
Gary & Sandra	Shuler		30790	NE	wood		Newberg	OR	97132	503.538.2300		FALSE	TRUE	FALSE		
Kimberly	Shute						Newberg	OR	97132	971-227-1302	kshute@johnlscott.com	TRUE	FALSE	FALSE		
Scott	Simmons		2712	E.	nd		Newberg	OR	97132		ssimmons@cpmt.com	TRUE	FALSE	FALSE		
Bryan	Skits							OR			com	TRUE	FALSE	FALSE		
Kelly	Sluman							OR			k.sluman@comcast.net	TRUE	FALSE	FALSE		
Philip	Smith	Planning Commission					Newberg	OR	97132		psmith@georgefox.edu	TRUE	FALSE	FALSE		
James & Vickie	Smith		23995	NE	n Rd		Newberg	OR	97132	503.538.6667	jimvic37@hotmail.com	FALSE	TRUE	FALSE		
Phil	Smith		2016		i Dr		Newberg	OR	97132		psmith@georgefox.edu	TRUE	FALSE	FALSE		
Ranee	Smith	Barnes Elementary School	32300	NE	Parre		Newberg	OR	97132	503-672-3500	12.or.us	FALSE	TRUE	FALSE		
Don	Smith		13510	NE	el Rd		Newberg	OR	97132			FALSE	TRUE	FALSE		
Dorothy C.	Smith		13510	NE	el Rd		Newberg	OR	97132	503-319-8089		FALSE	TRUE	FALSE		
Dotti & Steve	Smits		30175	NE	s Ln		Newberg	OR	97132	503.538.4940	hadyour5@yahoo.com	TRUE	FALSE	FALSE		
Jim	Snell		17863	SW	dhav		Sherwood	OR	97140		jim@jimsnell.com	TRUE	FALSE	FALSE		
Peter	Snow		28815	NE	onvill		Newberg	OR	97132			FALSE	TRUE	FALSE		
Arlene	Snyder		29505	NE	amin		Newberg	OR	97132	503.538.4670		FALSE	TRUE	FALSE		
Mike	Soderquist		PO Box 282				Newberg	OR	97132		sod2@verizon.net	TRUE	FALSE	FALSE		
Robert	Soppe		709	E	dan		Newberg	OR	97132		no such email address	FALSE	TRUE	TRUE	08/14/2009	
Craig & Julianna	Sowash		3190	NE	l		Newberg	OR	97132	503.538.9494	sowashj@oemba.org	TRUE	FALSE	FALSE		
Julianna	Sowash		no such address				Newberg	OR	97132		no such email address	FALSE	FALSE	TRUE	07/23/2008	
Bette	Spada		28300	NE	onvill		Newberg	OR	97132		hyperuhaul@msn.com	TRUE	FALSE	FALSE		
Karen	Spear		3320		ngto		Newberg	OR	97132			FALSE	TRUE	FALSE		
Phil	Spessard		1600	NE	alem		Newberg	OR	97132		RA5Vigilante@msn.com	TRUE	FALSE	FALSE		
David	Sprechy		4009	N	ge St		Newberg	OR	97132	503.538.2878		FALSE	TRUE	FALSE		
Scott	Steckley		no such address		and	B	Newberg	OR	97132		steckleys@calledi.nt	TRUE	FALSE	TRUE	08/27/2009	
Thomas	Steinman		P.O. Box 312				Newberg	OR	97132			FALSE	TRUE	FALSE	12/13/2007	
Gerald & Jadene	Stensland		901	N	cher	169	Newberg	OR	97132			FALSE	TRUE	FALSE		
Bev	Stepp		PO Box 3174				Newberg	OR	97132	503.538.5190		FALSE	TRUE	TRUE	07/23/2008	
Mary	Stern		535	NE	St		McMinnville	OR	97128		sternm@co.yamhill.or.us	TRUE	FALSE	FALSE		
Truman A.	Storie	Palmer PC	515	East	St.		Newberg	OR	97132	503-538-3138	truman@newberglaw.com	TRUE	FALSE	FALSE	05/08/2008	
Mart	Storm		22965	NE	ycres		Newberg	OR	97132			FALSE	TRUE	FALSE		
Ellyn & Jerry	Stouffer		no such address				Newberg	OR	97132		no email provided	FALSE	FALSE	TRUE	04/21/2009	
Elaine	Streed				Box		Newberg	OR	97132		scubal@earthlink.net	TRUE	FALSE	FALSE	06/13/2008	
Gene	Strohman		32775		Parre		Newberg	OR	97132			FALSE	TRUE	FALSE		
Tanya	Strub		1107	S	alem		Newberg	OR	97132	503.554.9018	no such email address	FALSE	TRUE	TRUE	07/18/2008	
Mike & Cathy	Stuhr	Planning Commission	31100	NE	wood		Newberg	OR	97132	503 702.4974	Mcstuhr@verizon.net	TRUE	FALSE	FALSE		
Mike	Sturdevant							OR		503.538.4300	trimountain@comcast.net	TRUE	FALSE	FALSE		
Robert & Rebecca	Summers		23910	NE	e		Newberg	OR	97132		besnwecky@hotmail.com	TRUE	FALSE	FALSE		
Frances	Svendsen		30170	NE	amin		Newberg	OR	97132	503.538.3415		FALSE	TRUE	FALSE		
Bill & Deb	Swandson		29770	NE	onvill		Newberg	OR	97132			FALSE	TRUE	FALSE		

Darlene	Swonger		2605		alem		Newberg	OR	97132	503.538.4890		FALSE	TRUE	FALSE		
Jack and Darlene	Swonger		No such address				Newberg	OR	97132	503-538-3534		FALSE	FALSE	TRUE	02/19/2009	
Stanton & Lori	Symank		1008	W	dan		Newberg	OR	97132			FALSE	TRUE	FALSE		
David	Tacheny		No such address				Clackamas	OR	97015		no such email address	FALSE	FALSE	TRUE	01/10/2008	
Richard	Taeubel		16780	NE	h Rd		Newberg	OR	97132			FALSE	TRUE	FALSE		
Rick& Jeane	Talbott		14250	NE	n Rd		Newberg	OR	97132	503.348.9625	no such email address	FALSE	TRUE	TRUE		
Keith & Babetta	Taylor		29195	NE	amin		Newberg	OR	97132			FALSE	TRUE	FALSE		
Elaine	Taylor	Retired						OR			eartaylor@yahoo.com	TRUE	FALSE	FALSE	04/29/2009	
Kathi	Thelander		212	W	St		Newberg	OR	97132		katnnetti@aol.com	TRUE	FALSE	FALSE		
Gary & Pamela	Thomas				Box		Newberg	OR	97132	503 538.7123	t	TRUE	FALSE	FALSE		
Richard & Nancy	Thomas		24000	NE	n Rd		Newberg	OR	97132		njthomas2@aol.com	TRUE	FALSE	FALSE		
Russ	Thomas		1808		Ln		Newberg	OR	97132	503.538.9255		FALSE	TRUE	FALSE		
Ron	Thomason							OR			thomason@integrity.com	TRUE	FALSE	FALSE		
Milton	Thompson		29275	NE	am		Newberg	OR	97132			FALSE	TRUE	FALSE		
Milt & Sally	Thompson		29275	NE	am		Newberg	OR	97132	503.538.2774	mgtsat@juno.com	TRUE	FALSE	FALSE		
Steve & Mary	Thure		3512	N	n		Newberg	OR	97132			FALSE	TRUE	FALSE		
Mike	Torgeson		8315	NE	Ridg		Newberg	OR	97132	503.969.2014	torgeson_5@msn.com	TRUE	FALSE	FALSE		
Nick	Tri	Planning Commission					Newberg	OR	97132		trik8@verizon.net	TRUE	FALSE	FALSE		
Zdenka	Trnkova				Box		Newberg	OR	97132			FALSE	TRUE	FALSE		
John	Trudel	Assoc	4303	NE	aven		Newberg	OR	97132	503.538.1169	jtrudel@trudelgroup.com	TRUE	FALSE	FALSE	02/04/2008	
Scott	Tucker		1205	NE	Jr		Portland	OR	97229	503.286.9739		FALSE	TRUE	FALSE		
Tommy	Tucker		3304	N	n		Newberg	OR	97132			FALSE	TRUE	FALSE		
Steve	Ulman	and Development	635		ol St NE	150	Salem	OR	2540	503 373.0050	no such email address	FALSE	TRUE	TRUE	04/22/2009	
Erika	Unknown							OR			om	TRUE	FALSE	FALSE		
Robin	Vachter		24285	NE	Ln		Newberg	OR	97132			FALSE	TRUE	FALSE		
Valery	Van Gundy		24495	NE	240		Newberg	OR	97132	503.476.7030	nwrider@teleport.com	TRUE	FALSE	FALSE		
Roy & Gloria	Van Houten		12465		y Ln		Newberg	OR	97132	503.538.9308		FALSE	TRUE	FALSE		
Brett	Veatch				Box		Newberg	OR	97132	503.537.5506	coppergoldinc@msn.com	TRUE	FALSE	FALSE		
John	Velez		17685	NE	der		Sherwood	OR	97140			FALSE	TRUE	FALSE		
Joyce	Vergets		1301		n St.	250	Newberg	OR	97132			FALSE	TRUE	TRUE	07/23/2008	
Barbara	Vetter		1220		St SE		Salem	OR	97302			FALSE	TRUE	FALSE		
Ryan	Vetter		1220		St SE		Salem	OR	97302			FALSE	TRUE	FALSE		
Tony	Visuano				Box		Willamina	OR	97396		tonyv@prurep.com	TRUE	FALSE	FALSE		
Chris	Voigt		PO BOX 788				Carlton	OR	0700	503.939.7481	no such email address	FALSE	TRUE	TRUE	08/01/2008	
Curt	Walker		901		cher	201	Newberg	OR	97132	503.538.0404	cdw_901@yahoo.com	TRUE	FALSE	TRUE	02/19/2009	
Hayli & Dave	Walker				Box		Newberg	OR	97132	503.554.1710		FALSE	TRUE	FALSE		
Lon	Wall	Planning Commission	625	N	on St		Newberg	OR	97132		und.com	TRUE	FALSE	TRUE	05/08/2008	
Delmar & Darlene	Washburn		10820	NE	enso		Newberg	OR	97132	503 538.7532	mail@theomatics.com	TRUE	FALSE	FALSE		
	Trust		10820	NE	enso		Newberg	OR	97132	503 538.7532	mail@theomatics.com	TRUE	FALSE	FALSE		
Craig & Elizabeth	Wasson		24077	NE	ycres		Newberg	OR	97132			FALSE	TRUE	FALSE		
David & Corrine	Waterbury		32695	NE	Parre		Newberg	OR	97132		s.com	TRUE	FALSE	FALSE	11/03/2008	
Shirley & Dick	Wayne		24200	NE	Ln		Newberg	OR	97132	503.538.5781		FALSE	TRUE	FALSE		
	Trust		24200	NE	Ln		Newberg	OR	97132	503 538.5781		FALSE	FALSE	FALSE	06/11/2008	06/11/2008
Pamela	Weaver		PO Box 764				Newberg	OR	97132	5035381588	nce.org	TRUE	FALSE	FALSE	10/27/2008	
Tom	Weber		12755	SW	Ave	0	Portland	OR	97223		tom@terra-weber.com	TRUE	FALSE	FALSE		
Donald & Joyce	Weeks		23805	NE	ycres		Newberg	OR	97132			FALSE	TRUE	FALSE		
Kenneth M.	Wegter		3872		shain		Salem	OR	97305			FALSE	TRUE	TRUE	08/29/2008	
Shawn	Weichbrodt							OR			no such email address	FALSE	FALSE	TRUE	01/10/2008	
Matt	Wellner	Wellner Residential	17933	NW	gree	300	Beaverton	OR	97006	503-970-5699	oup.com	TRUE	FALSE	FALSE	10/01/2008	
Duane	Wells		30350	N	99W		Newberg	OR	97132			FALSE	TRUE	FALSE		
Patricia	Werth		33180	NE	en		Newberg	OR	97132			FALSE	TRUE	FALSE		
Dean	Werth		33180	NE	en		Newberg	OR	97132	503.538.5157	dew@gofreewire.com	FALSE	TRUE	FALSE		
Raymond & Lynn	Weygandt	Meeting Center	809	W	St		Newberg	OR	97132	503-701-7273	m	TRUE	FALSE	FALSE		
Dana	White	Providence Health System	4706	NE	n		Portland	OR	97213	503-215-7325		FALSE	TRUE	FALSE		
Trina	Whitman		5415	SW	gate	100	Portland	OR	97221			FALSE	TRUE	FALSE		
Michael	Willcuts				Box		Newberg	OR	97132		no such email address	FALSE	TRUE	TRUE	12/27/2007	
Blake	Williams		4500	NE	Hero		Newberg	OR	97132			FALSE	TRUE	FALSE		
Greg	Winterowd		310	SW	Ave	0	Portland	OR	97204		g.com	TRUE	FALSE	FALSE		
Wade	Witherspoon	City Council					Newberg	OR	97132		ademy.com	TRUE	FALSE	FALSE		
Eugene	Wolf		30003	SW	Dr		Wilsonville	OR	97132	503.704.5262	gene@wolfnw.com	TRUE	FALSE	FALSE		
Jeffrey	Wolff		No such number									FALSE	FALSE	TRUE	12/07/2007	
Gary & Rosanna	Wong		29235	NE	am		Newberg	OR	97132			FALSE	TRUE	FALSE		
Howard	Wood		No such address	SW	view		Newberg	OR	97132		hwoodco@verizon.net	FALSE	FALSE	TRUE	11/01/2008	04/08/2008
Ron	Woodard		5995	SW	ar		McMinnville	OR	97128	503.472.2009	.com	TRUE	FALSE	FALSE		
Dean	Worth		No such address					OR			no such email address	FALSE	FALSE	TRUE	12/10/2007	
Marvin & Ellie	Wycliff		2505	NE	alem		Newberg	OR	97132	503.537.9249	elliew@teleport.com	TRUE	FALSE	FALSE		
John	Wyland	J.T. Smith Company	4386	SW	dem	305	Portland	OR	97239	3402x203		FALSE	TRUE	FALSE	11/21/2008	
Joni	Zimmerman		1101	W	dan		Newberg	OR	97132		joni@1renetic.com	TRUE	FALSE	FALSE		

Naomi	Zwerdling	ODOT	455	rt Rd	B	Salem	OR	503.986.2836	FALSE	TRUE	FALSE	

City of Newberg

Volume 4, Issue 3

November 6, 2009

News of Newberg's Future

INSIDE THIS ISSUE:

South Industrial Area Master Plan 2

South Industrial Area UGB Amendment 2

Economic Opportunities Analysis 3

Urban Reserve Area Update 3

Downtown Development Projects 4

City Contact Info 4

Affordable Housing Action Plan

The City is continuing its efforts to support affordable housing for our citizens. With the completion of our *Affordable Housing Action Plan* last May, we are now focusing on implementing the recommendations of that Plan. Since last summer, the Planning Commission has been holding a series of public hearings regarding proposed changes to the Newberg Development Code that should encourage the development of more affordable housing as well the retention of our existing affordable housing supply. In addition, the Mayor has appointed a new Ad Hoc Committee that will further develop and refine some of the tasks outlined in the Plan and then forward their work on to the City Council for consideration. Ensuring that all our citizens have safe, decent affordable housing is a tough challenge, but we are making good, steady progress towards achieving that goal.

At their next meeting on **November 12, 2009**, the Planning Commission will consider changes to the Development Code that would do the following to support the development of affordable housing:

- Permit duplexes in the R-1 (Low Density Residential) zone
- Allow greater flexibility in the use of accessory dwelling units (ADUs)

- Allow unlimited residential dwelling units above the ground floor in the C-1 (Neighborhood Commercial) zone
- Provide incentives for development of more affordable units in Planned Unit Developments (PUDs)
- Allow any legal non-conforming duplex or multi-family unit to be reconstructed if destroyed
- Reduce and provide flexibility to parking requirements for affordable housing projects.

For more information about the Affordable Housing Action Plan, contact David Beam at 503-537-1213

★ STAR Award for Citizen Involvement ★

Newberg's Planning Division is the first recipient of the state's newly created STAR Award for citizen involvement! The recipient of the STAR Award was decided by the state's Citizen Involvement Advisory Committee, an advisory committee to the Land Conservation Development Commission. The STAR Award recognizes exemplary efforts, by an organization or an individual, to involve citizens in a land use planning process. Newberg received the award for its 5-year effort to engage the community in *Newberg's Future*, a public outreach campaign designed to provide information and obtain feedback from citizens on how Newberg should plan for growth over the next 30 years.

"This award is a tribute to all the citizens of Newberg who took time to drop by a booth, read a newsletter, fill out a questionnaire, or just listen to a presentation," said Barton Brierley, Newberg's Planning and Building Director.

Thank you, citizens, for all of your help! For more information, visit our website: www.newbergoregon.gov.

South Industrial Area Master Plan

For more information about the South Industrial Area Master Plan, contact Jessica Nunley at 503-554-7744.

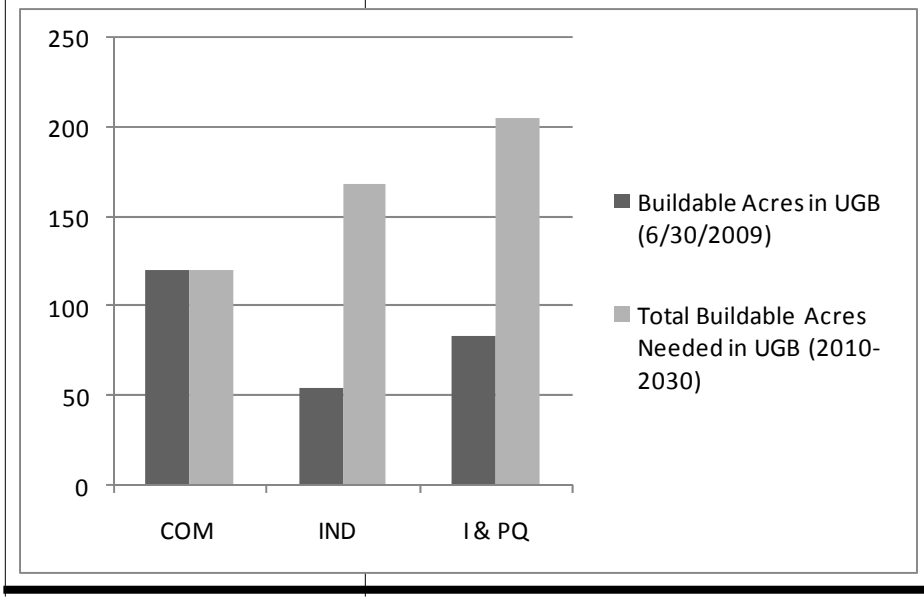
On November 2, 2009, the Newberg City Council accepted the South Industrial Area Master Plan as a vision plan for the area south of Newberg, on either side of Highway 219. The City Council also adopted Development Code amendments that create and implement a new M-4 industrial zone, which would primarily be used within the future South Industrial Area, and a new Interim Industrial (II) overlay zoning district, which would primarily be used in places that are planned for future right-of-way acquisition (i.e. for the Newberg-Dundee Bypass).

The next step in the South Industrial process is to start work on an Urban Growth Boundary amendment for the first phase of the industrial area, approximately 114 buildable acres.

South Industrial Area UGB Amendment

For more information about the Phase One UGB Amendment, contact Jessica Nunley at 503-554-7744.

According to our buildable lands inventory (see table below), Newberg has an identified need for approximately 114 acres of industrial land over the next 20 years. The South Industrial area was identified as the appropriate area for future industrial development through the *Newberg's Future* process. In addition, the South Industrial area meets the city's adopted industrial site suitability criteria: 1) large parcel sizes, 2) flat topography, 3) proximity to transportation networks and urban services (water, sewer, etc), 4) compatibility with adjacent properties, and 5) minimal impact on adjacent agricultural land.

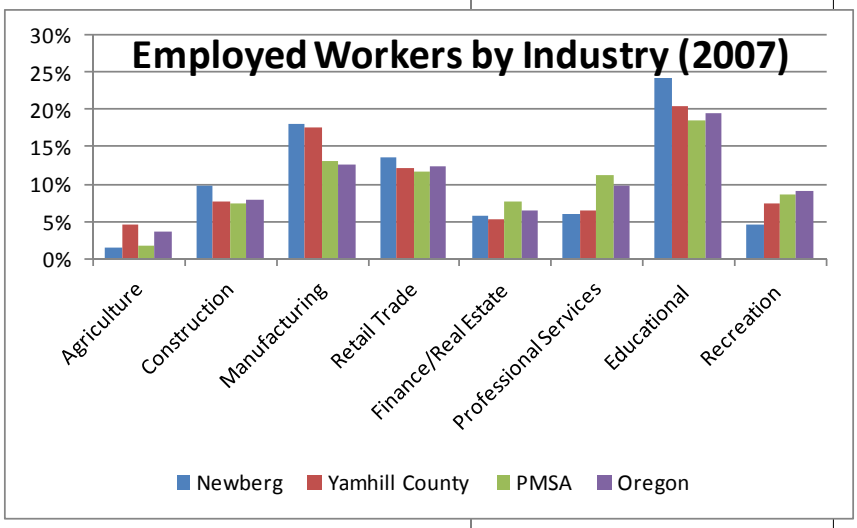


The South Industrial area meets these criteria because it is adjacent to the existing Urban Growth Boundary for easy access to urban services, it has easy access to Highway 219 & Highway 99W without going through downtown, it has large parcels with flat topography, and it has a natural stream corridor buffer on both sides of the plan area to minimize the impact on adjacent uses.

We are working on findings to support the Urban Growth Boundary amendment and expect to start the public process in early 2010. We will keep you posted of the upcoming public meetings for this project.

Economic Opportunities Analysis

We are currently working on a revision and update of the Economic Opportunities Analysis (EOA). The EOA is part of the Comprehensive Plan and also helps implement Statewide Planning Goal 9, Economic Development. The current version of the EOA was adopted in 2006. Many things have changed since 2006, including development of available land and other economic statistics, which resulted in the need to update the EOA with new information. In addition to Newberg population and economic statistics, the EOA also has data on Newberg's comparative advantages & disadvantages, our economic development strategy, and Newberg's industrial and commercial land needs and supply. The graph at the right shows Newberg's employed workers by industry.



Newberg residents have made it clear that they value the "live here, work here, shop here" values and way of life. To keep up the City's commitment to the values of its residents, Newberg must strengthen its economic base and provide adequate industrial and commercial land for current and future populations. The buildable land supply table on the previous page shows a shortage of both types of land in the current UGB. The City cannot help provide enough jobs for current and future residents without adequate land to locate new businesses on, and without adequate land for existing businesses to expand onto.

Fortunately, Newberg has many advantages that make it stand out in the regional marketplace and that make it attractive to businesses, including the following:

- Small town quality of life
- Access to quality education and skills training
- Strong established and growing industry clusters
- Strong local support for business and employment opportunities
- Proximity to the Portland Metropolitan Region
- Future Newberg-Dundee Bypass

Therefore, if Newberg can provide enough suitable industrial and commercial land, we believe that current businesses will stay and expand here and that new businesses will want to locate here.

The Newberg Planning Commission will hold a hearing on December 10, 2009 at 7 p.m. at the Newberg Public Safety Building (401 E Third Street) to consider the revised Economic Opportunities Analysis and make a recommendation to the City Council regarding its adoption. The revised EOA is then tentatively scheduled to be considered by the City Council at their January 4, 2010 meeting.

For more information about the Economic Opportunities Analysis, contact Jessica Nunley at 503-554-7744.

Urban Reserve Area Update

Staff is currently working on revising the findings for the proposed Urban Reserve Area amendment in accordance with the accepted rule interpretations in the remand decision. We expect to submit the revised findings to the Department of Land Conservation & Development (DLCD) sometime in early 2010.

We will keep you updated on the progress of this project. Stay tuned for future updates in upcoming newsletters.

For more information about the Urban Reserve Area project, contact Barton Brierley at 503-537-1212.

City of Newberg

414 E First Street
P.O. Box 970
Newberg, OR 97132

Phone: 503-537-1240
Fax: 503-537-1272

We have a new website! Visit us on the web at: www.newbergoregon.gov

To receive this newsletter electronically, email Tami at tami.bergeron@ci.newberg.or.us and let her know!

Upcoming Public Meetings	
11/12/09	Planning Commission
11/16/09	City Council
11/18/09	Newberg Downtown Revitalization Committee
12/7/09	City Council
12/10/09	Planning Commission

Note: Meeting schedule is subject to change

Contact Information for the City of Newberg Planning Division:

Barton Brierley, Planning & Building Director: 503-537-1212, barton.brierley@newbergoregon.gov

David Beam, Economic Development Planner: 503-537-1213, david.beam@newbergoregon.gov

Steve Olson, Associate Planner: 503-537-1215, steve.olson@newbergoregon.gov

Jessica Nunley, Assistant Planner: 503-554-7744, jessica.nunley@newbergoregon.gov

Luke Pelz, Assistant Planner: 503-554-7728, luke.pelz@newbergoregon.gov

Tami Bergeron, Office Manager: 503-554-7788, tami.bergeron@newbergoregon.gov

Feel free to contact us with any planning questions you have!

Helping to Shape A Well-Rounded Community

Downtown Development Projects

The Newberg Downtown Revitalization Committee (NDRC) is coming very close to seeing some important projects come to fruition.

- First, the designs for the **downtown welcome sign** have received planning and building permits, so construction of the sign is expected to begin soon. The sign will be located near the flagpole at the eastern end of our downtown and will be a beautiful addition to this historic district.
- Second, the designs for the **downtown demonstration block project** are expected to be approved soon. After design approval, the City will solicit bids on the project and then hire a firm to begin construction. This project is located on the south side of First Street between College Street and School Street and will include multiple pedestrian improvements, such as bulb-outs, improved landscaping, benches, trash cans, and bike racks.
- Third, we are in the process of getting **new signs identifying the breezeway path** between First Street and the public parking lot off of Second Street behind the First Street businesses. Both the breezeway path and the public parking lot are often underutilized, and this is a way to call attention to them both. The sign on First Street will be a fin type sign, hanging from the brick wall above the breezeway path. The sign on the parking lot side will be a flat wall sign located above the entrance to the breezeway. Look for these signs to be installed in the next month or two!

FORM 1

DLCD Notice of Proposed Amendment

DATE STAMP
in person ☐ electronic ☐ mailed ☐
For DLCD Use Only

THIS FORM **MUST BE RECEIVED** BY DLCD AT LEAST
45 DAYS PRIOR TO THE FIRST EVIDENTIARY HEARING
PER ORS 197.610, OAR CHAPTER 660, DIVISION 18

Jurisdiction: **City of Newberg**
Date of First Evidentiary Hearing : **12/10/2009**
Local File Number: **CPTA4-09-001**
Date of Final Hearing: **01/04/2010**
Is this a **REVISION** to a previously submitted proposal? ☐Yes ☒No Date submitted: **10/26/09**

☒ Comprehensive Plan Text Amendment
☐ Comprehensive Plan Map Amendment
☐ Land Use Regulation Amendment
☐ Zoning Map Amendment
☐ New Land Use Regulation
☐ Urban Growth Boundary Amendment
☐ Transportation System Plan Amendment
☐ Other:

Briefly Summarize Proposal. Do not use technical terms. Do not write "See Attached"(limit 500 characters):
Revises Newberg's Economic Opportunities Analysis. Updates the analysis with certain information from the 2005-2007 American Community Survey and regional studies. Revises and clarifies list of Newberg targeted industries. Updates industrial and commercial lands needs, inventories, and suitability criteria. Updates comprehensive plan text and land use inventories to reflect updated information.

Has sufficient information been included to advise DLCD of the effect of proposal? ☒Yes, text is included
For Map Changes: Include 8½"x11" maps of Current and Proposed designation. ☐ Yes, Maps included
Plan map changed from: To:
Zone map changed from: To:
Location of property (do not use Tax Lot):
Previous density: New density: Acres involved:
Applicable statewide planning goals:

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
☐	☒	☐	☐	☐	☐	☐	☐	☒	☐	☐	☐	☐	☒	☐	☐	☐	☐	☐

Is an exception to a statewide planning goal proposed? ☐ YES ☒ NO Goals:

Affected state or federal agencies, local governments or special districts (It is jurisdiction's responsibility to notify these agencies. DLCD only records this information):
Yamhill County, OBDD

Local Contact: **Barton Brierley**
Phone: **503-537-1212** Extension:
Address: **P.O. Box 970**
City: **Newberg** Zip: **97132**
Fax Number: **503-537-1272**
E-mail Address: **barton.brierley@newbergoregon.gov**

DLCD file No. _____

SUBMITTAL REQUIREMENTS

This form must be received by DLCD at least 45 days prior to the first evidentiary hearing
per ORS 197.610 and OAR Chapter 660, Division 18

1. This form must be submitted by local jurisdictions only (not by applicant).

2. When submitting, please print this **form** on light **green paper**.

3. **Text:** Submittal of a proposed amendment to the text of a comprehensive plan or land use regulation must **include the text** of the amendment and any other information the local government believes is necessary to advise DLCD of the effect of the proposal. "Text" means the specific language being added to or deleted from the acknowledged plan or land use regulations. A general description of the proposal is not adequate. **Do not submit this form without supporting documentation.**

4. **Maps:** Submittal of a proposed map amendment must also include a map of the affected area showing existing and proposed plan and zone designations. The map should be legible and on 8½ x 11 inch paper. Please provide the specific location of property, such as an address and/or tax lot number. Include text regarding background and/or the justification for the change, such as the application accepted by the local government.

5. **Exceptions:** Submittal of proposed amendments that involve a goal exception must include the proposed language of the exception.

6. Unless exempt by ORS 197.610(2), proposed amendments must be received at the DLCD's Salem office at least 45 days before the first evidentiary hearing on the proposal. (The clock begins on the day DLCD **receives** your proposal.) The first evidentiary hearing is usually the first public hearing held by the jurisdiction's planning commission on the proposal.

7. If you have an electronic copy of the proposal, we would like you to submit one electronic copy [email, CD, or upload to DLCD (for submittal instructions, see # 4)] and **ONE PAPER COPY** of the proposed amendment to:

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

8. **Electronic Submittals: One** hard copy must be sent by mail or in person, by either email to larry.french@state.or.us. On the same day, please mail [1] hard copy to our office.

9. **Need More Copies?** You can now access these forms online at **http://www.lcd.state.or.us/**. Please print forms on **8-1/2x11 green paper only**. You may also call the DLCD Office at (503) 373-0050; or Fax your request to: (503) 378-5518; or Email your request to **larry.french@state.or.us** .

http://www.lcd.state.or.us/LCD/forms.shtml Updated March 16, 2009