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

I. ROLL CALL

II. OPEN MEETING

III. ELECTIONS FOR CHAIR AND VICE CHAIR
- If the Planning Commission wishes to follow their usual rotation then Nick Tri is in line for Chair and Phil Smith is in line for Vice Chair

IV. CONSENT CALENDAR (items are considered routine and are not discussed unless requested)
- Approval of December 10, 2009 Planning Commission Meeting Minutes

V. COMMUNICATIONS FROM THE FLOOR (5 minute maximum per person)
- For items not listed on the agenda

VI. LEGISLATIVE PUBLIC HEARINGS (complete registration form to give testimony - 5 minute maximum per person, unless otherwise set by majority motion of the Planning Commission)

1. 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)

2. 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 State 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
   CRITERIA: Newberg Development Code § 151.122(B)

VII. ITEMS FROM STAFF
1. Update on Council items
2. Other reports, letters, or correspondence
3. Next Planning Commission Meeting: February 11, 2010

VIII. ITEMS FROM COMMISSIONERS

IX. ADJOURN

FOR QUESTIONS PLEASE STOP BY, OR CALL (503) 537-1240, PLANNING & BUILDING DEPT. - P.O. BOX 970 - 414 E. FIRST STREET

ACCOMMODATION OF PHYSICAL IMPAIRMENTS:
In order to accommodate persons with physical impairments, please notify the City Recorder's office of any special physical accommodations you may need as far in advance of the meeting as possible and no later than 48 hours prior to the meeting. To request these arrangements, please contact the city recorder at (503) 537-1283. For TTY service please call (503) 554-7793.

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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; Nick Tri, Vice Chair; Cathy Stuhr; Derek Duff; Matson Haug; Amanda Golson, student PC; Thomas Barnes; Philip Smith

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; Robert & Dorothy Roholt; Saj Jivanjee; Maryann Tack; Ken Wegler; 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:	NO:	ABSENT: (List Name(s))	ABSTAIN: (List Name(s))

Planning Recording Secretary *Planning Commission Chair*

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TYPE IV, LEGISLATIVE PUBLIC HEARING PROCEDURE

1. OPEN THE PUBLIC HEARING, ANNOUNCE THE PURPOSE, DISCUSS TESTIMONY PROCEDURE, AND TIME ALLOTMENTS[1]

2. CALL FOR ABSTENTIONS, CONFLICTS OF INTEREST AND OBJECTIONS TO JURISDICTION

3. STAFF REPORT

   A. PROJECT SUMMARY AND RECOMMENDATION BY STAFF

   B. STAFF SUMMARY OF LATE CORRESPONDENCE SUBJECT TO PLANNING COMMISSION REQUEST[2]

4. PUBLIC TESTIMONY (SEE "HOW TO TESTIFY" FORM)[3] [4]

   A. THE PLANNING COMMISSION CHAIR WILL CALL YOUR NAME WHEN IT'S YOUR TURN TO TESTIFY (NOTE: COMMISSIONERS MAY ASK QUESTIONS DURING THE TESTIMONY PERIOD, AT THE DISCRETION OF THE CHAIR)

5. STAFF SUMMARY OF WRITTEN TESTIMONY FROM REGISTRATION FORMS

6. CLOSE OF PUBLIC TESTIMONY PORTION OF HEARING (GAVEL)

7. FINAL COMMENTS FROM STAFF

8. DELIBERATION OF COMMISSION

9. ACTION BY THE PLANNING COMMISSION

NOTE: No new public hearings will be started after 10:00 p.m. (except by majority vote of the Commission).

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1 The Chair of the Planning Commission may set time limits on the public testimony portion of the hearing.

2 ORS 197.763(3)(j) allows the City to establish procedures for submittal of evidence. The Planning Commission has established a period of one week prior to hearing for submittal of written evidence in order to be considered at the hearing. Written testimony received late will only be considered at the discretion of the Planning Commission.

3 Questions by those wishing to testify should be directed to the Chair during the PUBLIC TESTIMONY (Step 4) portion of the public hearing.

4 Questions may be asked by the Commissioners thru the chair during the PUBLIC TESTIMONY (Step 4) portion of the public hearing.

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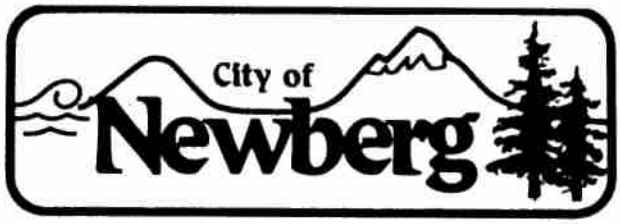
City of Newberg
414 E First Street
P.O. Box 970
Newberg, OR 97132



City Manager
(503) 538-9421
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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

CITY OF NEWBERG
DEVELOPMENT CODE AMENDMENT
STAFF REPORT

FILE NO: GEN FILE 09-007

REQUEST: Amend the Newberg Development Code to support affordable housing regarding: adding a definition of "special needs housing"; clarifying planning review process for accessory dwelling units; reducing parking requirements near transit stops; and increasing the number of lots allowed per driveway.

APPLICANT: City of Newberg

PREPARED BY: City of Newberg Planning Staff

DATE OF HEARING: January 14, 2010

ATTACHMENTS:
Planning Commission Resolution No. 2009-273:
Exhibit A: Proposed Development Code Amendments
1. Fire Apparatus Access Roads – 2007 Oregon Fire Code
2. Email from Roy Gathercoal
3. Staff PowerPoint presentation
4. *Newberg Affordable Housing Action Plan* (by reference)

SUMMARY

On May 4, 2009, the Newberg City Council passed Resolution No. 2009-2843, accepting the Newberg Affordable Housing Action Plan. One of the recommended actions within the Plan is for the City to consider the adoption of amendments to the Newberg Development Code that are designed to support affordable housing.

On January 14, 2010, the Newberg Planning Commission will continue its public hearing held on December 10, 2009 regarding the following proposed development standards intended to help support affordable housing:

- Add a definition regarding "special needs housing";

- Clarify that the planning process for the recommendation that accessory dwelling units be an allowed use in the R-1 and R-P zones instead of the current conditional use would be an administrative Type 1.
- 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.

It should be noted that the residential design standard amendments proposed at the December 10, 2009 will be brought before the Planning Commission at a future public hearing.

The proposed Planning Commission Resolution No. 2009-273 recommends that the City Council adopt these proposed amendments.

BACKGROUND

In recent years, the City of Newberg has been examining the community's future land needs and taking steps to accommodate the anticipated future growth. The City's analysis of future land needs has found that if current housing construction trends continue into the future, lack of affordable housing in Newberg will likely continue to be a significant issue.

On May 8, 2008, the Newberg City Council passed Resolution No. 2008-2781, establishing the Housing for Working Families Ad Hoc Committee. The charge of the Committee was to "... identify and recommend tools appropriate for the Newberg community that are intended to encourage the development of housing for working families." The Committee met twice a month from July 2008 to April 2009 with the goal to create an action plan to support the development and retention of affordable housing. On May 4, 2009, the Committee presented the *Newberg Affordable Housing Action Plan* to the City Council. At that meeting, City Council passed Resolution No. 2009-2843, stating their acceptance of the Plan.

On December 10, 2009, the Newberg Planning Commission will hold a public hearing regarding various proposed *Newberg Development Code* amendments supporting affordable housing. The Planning Commission continued that hearing to the January 14, 2010 meeting. The following describes the proposed changes.

1. **Definition of "special needs housing."** At the November 12, 2009 meeting, the Planning Commission requested that city staff to develop a proposed definition for "special needs housing." The Commission felt this was needed, since at that same meeting, the Commission recommended some new parking requirements for adoption by the City Council that referred to this term. Therefore, city staff would like to propose the following definition for "special needs housing": *Group housing specially designed or adapted for those with particular physical, developmental disability, or social needs.*

2. **Clarify the planning process for construction of accessory dwelling units.** At the last Planning Commission meeting, the Commission recommended that ADUs be allowed as an outright permitted use in the R-1 and R-P zones instead of a conditional use. The Commissioned asked what planning process would be used under this change. Staff recommends that a Type I administrative process be used for this type of land use. Decisions on Type I planning application are made by the Planning and Building Director. No public notice or public hearing is required for this process.

3. **Reduce parking requirements for affordable housing projects with nearby transit access.** At the last Planning Commission meeting, the Commission considered changes to off-street parking requirements for affordable housing projects. The proposed changes were derived from Action 4.2G of the *Newberg Affordable Housing Action Plan.* One of the suggested changes under Action 4.2G was inadvertently left off the last meeting's agenda. That suggested change from the *Action Plan* is as follows: *Reduce parking requirements where the development is within 1,500 feet of a transit stop or where the development provides its own transit.*

   City staff performed a brief search on the internet to see if there is a "conventional wisdom" regarding how far people are willing walk to get to a transit stop. From that research, the proposed standard of 1,500 feet appeared to be fairly common standard. However, staff found the quality of that route was also an important factor. In other words, the route pedestrians take

must also be safe, such as a continuous sidewalk from the housing to the transit stop. In some cases, a disconnected sidewalk from a transit stop could be made continuous through the construction of sidewalk in gaps missing from the route. Given this information, staff would like to propose the following development code language: *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 and average of less than one hour regular service during the daytime or where the development provides its own transit. A developer may qualify for this parking reduction if improvements on a proposed pedestrian route are made by the developer, thereby rendering it an adequate continuous route.*

4. **Modify current driveway standard to allow more than two lots per driveway.** This recommendation comes from Action 4.2L of the *Newberg Affordable Housing Action Plan.* Prior to 1999, the City allowed 6 lots per driveway. The current standard was established because the Planning Commission felt that driveways connecting multiple lots often experienced issues with cars parking on the relatively narrow driveways. They felt that this situation created a safety issue by limiting the access width of the driveway for public safety vehicles to reach homes in need. By limiting the number of houses per driveway to two, rectification of any parking problem on with the driveway became much simpler by dealing with a person's one and only neighbor. In addition to lowering the number lots allowed on a driveway, the City also eliminated the ability of developers to create new private streets. The Planning Commission felt that private streets projected exclusivity and did not promote a sense of community in Newberg.

However, the current standard has brought its own set of issues. Access to a piece of property can produce multiple parallel driveways, taking up additional land and therefore driving up cost of housing. Also, multiple parallel driveways require additional landscaping between them, taking up additional valuable land. In addition, these landscaped areas may be difficult to maintain.

Planning staff has solicited comments from the Police and Fire Departments regarding this proposal. They expressed concerns in two areas. First, the Fire Department's main concern is maintaining adequate access for emergencies. Where multiple lots share common driveways, that driveway may be the only access for fire trucks, ambulances, and other emergency vehicles to reach the house. Fire access standards require a minimum 20 feet wide clear access where a home is more than 150 feet from the main street. While providing a 20-foot wide access is not usually an issue, keeping that access clear can be. Residents may see this fire access driveway as convenient place to park boats, RVs, or other equipment. When this occurs, emergency vehicles may be unable to immediately reach the location of the emergency, and those in the residence may have difficulty exiting the area. Second, the Police Department has expressed concerns that allowing shared driveways to access greater than 2 lots may potentially create more neighbor conflicts that would require police intervention. How shared driveways are to be used and maintained are not always fully understood or agreed upon by those using the driveway, creating the possibility of conflicts. In addition, police actions may be required to insure that designated fire lanes remain clear.

Driveways are often used where access to developable land is not large enough to accommodate a public street (private streets are no longer allowed in Newberg.) The use of driveways instead of public streets is one way to support affordable housing, as driveways are much cheaper to

construct than public streets. In addition, private driveways do not have to be maintained by the city, funds that can be put to better use in the community.

The Planning Commission can recommend to the City Council a standard allowing any number of lots per driveway or recommend no change at all. Staff recommends that any proposed change be between 2 lots per driveway (current standard) and 6 lots per driveway (previous limit.) Staff also recommends that each lot on a driveway must provide an additional off-street parking space, with intent that this action will alleviate the illegal parking issue. In any case, lots will still be required to be large enough to meet current total lot coverage standards and driveways must meet fire access standards and provide required turnarounds (please see Attachment 2.) In addition, staff recommends that any driveway that serves multiple lots must include a maintenance agreement regarding the driveway and its associated landscaping. Another option would be to allow whatever number of lots the Planning Commission may decide over 2 lots under a conditional use permit process.

It should be noted that the residential design standard amendments proposed at the December 10, 2009 will be brought before the Planning Commission at a future public hearing.

The proposed Planning Commission Resolution No. 2009-273 recommends that the City Council adopt the proposed amendments.

PRELIMINARY STAFF RECOMMENDATION

The preliminary staff recommendation is made in the absence of public hearing testimony, and may be modified subsequent to the close of the public hearing. At this writing, staff recommends the following motion:

Move to adopt **Planning Commission Resolution 2009-273** which recommends that the City Council adopt the proposed amendments to the Newberg Development Code, as detailed in Exhibit A in the resolution.

PLANNING COMMISSION RESOLUTION NO. 2009-273

A RESOLUTION OF THE PLANNING COMMISSION OF THE CITY OF NEWBERG RECOMMENDING THAT THE CITY COUNCIL AMEND THE NEWBERG DEVELOPMENT CODE STANDARDS REGARDING THE ADDITION OF A DEFINTION OF "SPECIAL NEEDS HOUSING; CHANGE THE PLANNING REVIEW PROCESS FOR ACCESSORY DWELLING UNITS TO TYPE 1; OPTION TO REDUCE PARKING REQUIREMENTS FOR RESIDENTIAL DEVELOPMENTS NEAR TRANSIT; INCREASING THE ALLOWED NUMBER OF LOTS PER DRIVEWAY; AND, CREATION OF NEW HOUSING DESIGN STANDARDS

RECITALS:

1. On May 8, 2008, the Newberg City Council passed Resolution No. 2008-2781, establishing the Housing for Working Families Ad Hoc Committee. The charge of the Committee was to "... identify and recommend tools appropriate for the Newberg community that are intended to encourage the development of housing for working families."

2. On May 4, 2009, the Housing for Working Families Ad Hoc Committee presented the *Newberg Affordable Housing Action Plan* to the City Council. At that meeting, City Council passed Resolution No. 2009-2843, stating their acceptance of the Plan.

3. The *Newberg Affordable Housing Action Plan* recommends that the City should consider the adoption of various amendments to the Newberg Development Code regarding: the addition of a definition of "special needs housing"; change the planning review process or accessory dwelling unit to Type 1; option to reduce parking requirements for residential developments near transit; increasing the allowed number of lots per driveway; and, creation of new housing design standards.

4. On November 25, 2009, notice of a public hearing on the proposed amendments was published in the Newberg Graphic. The same notice was posted in four public places on November 19, 2009 and mailed to interested parties on November 19, 2009.

5. On December 10, 2009, the Newberg Planning Commission held a public hearing on the proposed amendments. The Newberg Planning Commission continued that public hearing on the proposed amendments at the January 14, 2010 meeting.

NOW THEREFORE, BE IT RESOLVED by the Planning Commission of the City of Newberg that it recommends that the City Council approve the amendments to the Newberg Development Code as shown in Exhibit A, contingent upon the Planning Commission's review of additional proposed Development Code amendments described in the Newberg Affordable Housing Action Plan.

This recommendation is based on the staff report and testimony.

DATED this 14th day of January, 2010

AYES: NAYS: ABTAIN: ABSENT:

ATTEST:

_____ _____

Planning Commission Secretary Planning Commission Chair

Exhibit A: Proposed Newberg Development Code Amendments

Exhibit A to Resolution 2009-273
Proposed Newberg Development Code Amendments

Editorial Key:

Normal = existing text
~~Strikethrough~~ = proposed text deletion
Underline = proposed text additions

§ 151.003 DEFINITIONS

SPECIAL NEEDS HOUSING. Group housing specially designed or adapted for those with particular physical, developmentally disability, or social needs.

PRIVATE DRIVE. A private way which affords principal means of access to ~~two~~ [three, four, five six] or fewer lots (see also service drive). ***NOTE: Number to be determined by Planning Commission.***

PRIVATE STREET. A private way which affords principal means of access to ~~three~~ [four, five, six, seven] or more lots (see also service drive). ***NOTE: Number to be determined by Planning Commission.***

151.191 SITE DESIGN REVIEW APPLICABILITY.

(A) Applicability of requirements. Site design review shall be required prior to issuance of building permits or commencement of work for all improvements noted below. Site design review permits shall be processed as either a Type I or Type II, as noted below.

(1) Type I.

(a) Single family dwellings;

(b) Duplexes;

(c) Institutional, commercial or industrial additions which do not exceed 1000 square feet in gross floor area;

(d) Multi-family additions which do not exceed 1,000 square feet in gross floor area and do not add any new units, or new construction incidental to the main use on an existing developed site which do not exceed 1,000 square feet in gross floor area and do not add any new units;

(e) Institutional, commercial or industrial interior remodels which do not exceed 25% of the assessed valuation of the existing structure;

(f) Multi-family remodels which do not exceed 25% of the assessed valuation of the existing structure and do not add any new units;

(g) Signs which are not installed in conjunction with a new development or remodel;

(h) Modifications, paving, landscaping, restriping, or regrading of an existing duplex, multi-family, institutional, commercial or industrial parking lot.

(i) Fences and trash enclosures.

(j) Accessory dwelling units.

OFF-STREET PARKING REQUIREMENTS

§ 151.612 PARKING SPACES REQUIRED

Use	Minimum Parking Spaces Required
RESIDENTIAL TYPES	
Dwelling, multiple or two family or single family	2 for each dwelling unit; where fractioned, next highest full unit
Studio or 1 bedroom unit	1 per dwelling unit
2 bedroom unit	1.5 per dwelling unit
3 and 4 bedroom unit	2 per dwelling unit
5 or more bedroom unit	0.75 spaces per bedroom
Unassigned spaces	If a development is required to have more than 10 spaces on a lot then it must provide some unassigned spaces. At least 15% of the total required parking spaces must be unassigned and be located for convenient use by all occupants of the development. The location shall be approved by the Director.
Visitor spaces	If a development is required to have more than 10 spaces on a lot then it must provide at least 0.2 visitor spaces per dwelling unit.
On-street parking credit	On-street parking spaces may be counted toward the minimum number of required spaces for developments required to have more than 10 spaces on a lot. The on-street spaces must be directly adjoining and on the same side of the street as the subject property, must be legal spaces that meet all City standards, and cannot be counted if they could be removed by future street widening or a bike lane on the street.
Dwelling on shared driveway	1 additional space to what is otherwise required in this section.
Available transit service	At the review body's discretion, 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 and average of less than one hour regular service during the daytime or where the development provides its own transit. A developer may qualify for this parking reduction if improvements on a proposed pedestrian route are made by the developer, thereby rendering it an adequate continuous route.
Commercial Neighborhood District (C-1)	1 for each dwelling
Dwelling, single family or two family	2 for each dwelling unit on a single lot
Fraternities, sororities, cooperatives and dormitories	1 for each three occupants for which sleeping facilities are provided
Hotels, motels, motor hotels, etc.	1 for each guest room
Rooming or boarding houses	1 for each guest room
Special needs housing	1 space per 3 beds or actual parking needs as demonstrated through a parking analysis.

151.703 VEHICULAR ACCESS STANDARDS.

(F) Shared driveways. The number of driveways onto arterial streets shall be minimized by the use of shared driveways with adjoining lots where feasible. The city shall require shared driveways as a condition of land division or site design review, as applicable, for traffic safety and access management purposes in accordance with the following standards:

(1) Where there is an abutting developable property, a shared driveway shall be provided. When shared driveways are required, they shall be stubbed to adjacent developable parcels to indicate future extension. "Stub" means that a driveway temporarily ends at the property line, but may be accessed or extended in the future as the adjacent parcel develops. "Developable" means that a parcel is either vacant or it is likely to receive additional development (i.e., due to infill or redevelopment potential).

(2) Access easements (i.e., for the benefit of affected properties) shall be recorded for all shared driveways, including pathways, at the time of final plat approval or as a condition of site development approval.

(3) No more than ~~two~~ [three, four, five, six] lots may access one shared driveway. A maintenance agreement between the property owners using the shared driveway regarding the driveway and its associated landscaping shall be recorded.

APPENDIX D

FIRE APPARATUS ACCESS ROADS

The provisions contained in this appendix are adopted by the State of Oregon.

SECTION D101
GENERAL

D101.1 Scope. Fire apparatus access roads shall be in accordance with this appendix and all other applicable requirements of the *International Fire Code*. The fire code official may be guided by the Oregon Department of Land Conservation and Development's Neighborhood Street Design Guidelines, June 2001.

SECTION D102
REQUIRED ACCESS

D102.1 Access and loading. Facilities, buildings or portions of buildings hereafter constructed shall be accessible to fire department apparatus by way of an approved fire apparatus access road with an asphalt, concrete or other approved driving surface capable of supporting the imposed load of fire apparatus weighing at least 60,000 pounds (27 240 kg).

Exception: The minimum weight specified in Section D102.1 may be increased by the fire code official based upon the actual weight of fire apparatus vehicles serving the jurisdiction which provides structural fire protection services to the location, including fire apparatus vehicles that respond under automatic and mutual aid agreements.

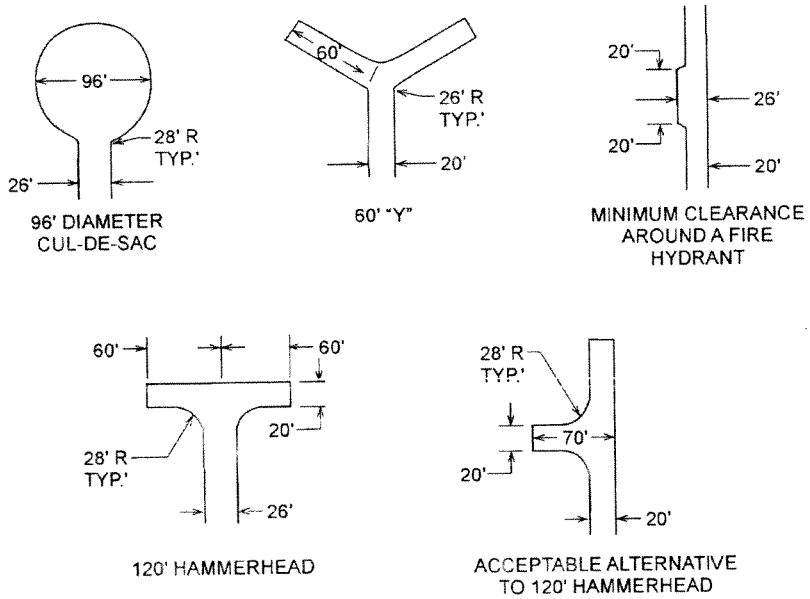
D102.1.1 Access in urban-wildland interface areas. For egress and access concerns in urban-wildland interface locations, the fire code official may be guided by the *International Wildland-Urban Interface Code*.

SECTION D103
MINIMUM SPECIFICATIONS

D103.1 Access road width with a hydrant. Where a fire hydrant is located on a fire apparatus access road, the minimum road width shall be 26 feet (7925 mm). See Figure D103.1.

Exceptions: The fire code official is authorized to modify the provisions of Section D103.1 when:

1. In accordance with OAR 918-480-0100, all buildings are completely protected with an approved automatic fire sprinkler system; or
2. Provisions are made for the emergency use of side-walks by such means as rolled or mountable curbs capable of supporting the fire department's apparatus; or
3. Streets or roadways are identified for one-way circulating flow of traffic or pullouts are provided every 150 feet (45 720 mm) on streets or roadways identified for two-way traffic; or



For SI: 1 foot = 304.8 mm.

FIGURE D103.1
DEAD-END FIRE APPARATUS ACCESS ROAD TURNAROUND

4. A grid system for traffic flow is provided and streets or roadways in the grid do not exceed 300 feet (91 400 mm) in length, but are accessible at each end from approved access roadways or streets.

D103.2 Grade. Fire apparatus access roads shall not exceed 10 percent in grade.

Exception: Grades steeper than 10 percent as approved by the fire chief.

D103.3 Turning radius. The minimum turning radius shall be determined by the fire code official.

D103.3.1 Angles of approach. The angles of approach and departure for any fire apparatus access roads shall not be less than the design limitations of the fire apparatus of the fire department, subject to the approval of the fire code official.

D103.3.2 Drainage. When subject to run-off damage, the fire code official is authorized to require approved drainage.

D103.4 Dead ends. Dead-end fire apparatus access roads in excess of 150 feet (45 720 mm) shall be provided with width and turnaround provisions in accordance with Table D103.4.

TABLE D103.4
REQUIREMENTS FOR DEAD-END FIRE APPARATUS ACCESS ROADS

LENGTH (feet)	WIDTH (feet)	TURNAROUNDS REQUIRED
0–150	20	None required
151–500	20	120-foot Hammerhead, 60-foot "Y" or 96-foot-diameter cul-de-sac in accordance with Figure D103.1
501–750	26	120-foot Hammerhead, 60-foot "Y" or 96-foot-diameter cul-de-sac in accordance with Figure D103.1
Over 750	Special approval required	

For SI: 1 foot = 304.8 mm.

D103.5 Fire apparatus access road gates. Gates securing the fire apparatus access roads shall comply with all of the following criteria:

1. The minimum gate width shall be 20 feet (6096 mm).
2. Gates shall be of the swinging or sliding type.
3. Construction of gates shall be of materials that allow manual operation by one person.
4. Gate components shall be maintained in an operative condition at all times and replaced or repaired when defective.
5. Electric gates shall be equipped with a means of opening the gate by fire department personnel for emergency access. Emergency opening devices shall be approved by the fire code official.
6. Manual opening gates shall not be locked with a padlock or chain and padlock unless they are capable of being opened by means of forcible entry tools or when a key box containing the key(s) to the lock is installed at the gate location.
7. Locking device specifications shall be submitted for approval by the fire code official.

D103.6 Signs. Where required by the fire code official, fire apparatus access roads shall be marked with permanent NO PARKING—FIRE LANE signs complying with Figure D103.6. Signs shall have a minimum dimension of 12 inches (305 mm) wide by 18 inches (457 mm) high and have red letters on a white reflective background. Signs shall be posted on one or both sides of the fire apparatus road as required by Section D103.6.1 or D103.6.2.

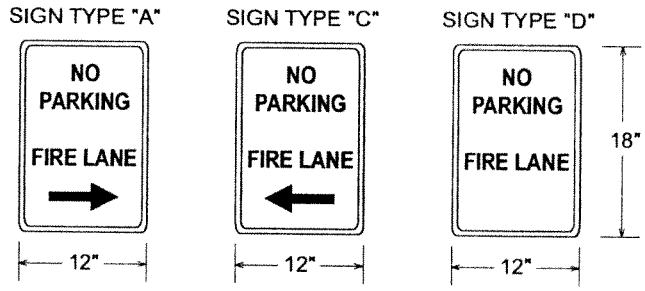


FIGURE D103.6
FIRE LANE SIGNS

D103.6.1 Roads 20 to 26 feet in width. Fire apparatus access roads 20 to 26 feet wide (6096 to 7925 mm) shall be posted on both sides as a fire lane.

D103.6.2 Roads more than 26 feet in width. Fire apparatus access roads more than 26 feet wide (7925 mm) to 32 feet wide (9754 mm) shall be posted on one side of the road as a fire lane.

SECTION D104
COMMERCIAL AND INDUSTRIAL DEVELOPMENTS

D104.1 Buildings exceeding three stories or 30 feet in height. Buildings or facilities exceeding 30 feet (9144 mm) or three stories in height shall have at least three means of fire apparatus access for each structure.

D104.2 Buildings exceeding 62,000 square feet in area. Buildings or facilities having a gross building area of more than 62,000 square feet (5760 m^2) shall be provided with two separate and approved fire apparatus access roads.

Exception: Projects having a gross building area of up to 124,000 square feet (11 520 m^2) that have a single approved fire apparatus access road when all buildings are equipped throughout with approved automatic sprinkler systems.

D104.3 Remoteness. Where two access roads are required, they shall be placed a distance apart equal to not less than one half of the length of the maximum overall diagonal dimension of the property or area to be served, measured in a straight line between accesses.

SECTION D105
AERIAL FIRE APPARATUS ACCESS ROADS

D105.1 Where required. Buildings or portions of buildings or facilities exceeding 30 feet (9144 mm) in height above the lowest level of fire department vehicle access shall be provided with approved fire apparatus access roads capable of accommodating fire department aerial apparatus. Overhead utility and power lines shall not be located within the aerial fire apparatus access roadway.

D105.2 Width. Fire apparatus access roads shall have a minimum unobstructed width of 26 feet (7925 mm) in the immediate vicinity of any building or portion of building more than 30 feet (9144 mm) in height.

D105.3 Proximity to building. At least one of the required access routes meeting this condition shall be located within a minimum of 15 feet (4572 mm) and a maximum of 30 feet (9144 mm) from the building, and shall be positioned parallel to one entire side of the building.

SECTION D106
MULTIPLE-FAMILY RESIDENTIAL DEVELOPMENTS

D106.1 Projects having more than 100 dwelling units. Multiple-family residential projects having more than 100 dwelling units shall be equipped throughout with two separate and approved fire apparatus access roads.

Exception: Projects having up to 200 dwelling units may have a single approved fire apparatus access road when all buildings, including nonresidential occupancies, are equipped throughout with approved automatic sprinkler systems installed in accordance with Section 903.3.1.1 or 903.3.1.2.

D106.2 Projects having more than 200 dwelling units. Multiple-family residential projects having more than 200 dwelling units shall be provided with two separate and approved fire apparatus access roads regardless of whether they are equipped with an approved automatic sprinkler system.

SECTION D107
ONE- OR TWO-FAMILY RESIDENTIAL DEVELOPMENTS

D107.1 One- or two-family dwelling residential developments. Developments of one- or two-family dwellings where the number of dwelling units exceeds 30 shall be provided with separate and approved fire apparatus access roads and shall meet the requirements of Section D104.3.

Exceptions:

1. Where there are more than 30 dwelling units on a single public or private fire apparatus access road and all dwelling units are equipped throughout with an approved automatic sprinkler system in accordance with Section 903.3 1.1, 903.3.1.2 or 903.3.1.3, access from two directions shall not be required.
2. The number of dwelling units on a single fire apparatus access road shall not be increased unless fire apparatus access roads will connect with future development, as determined by the fire code official.

CHAPTER 5
FIRE SERVICE FEATURES

SECTION 501
GENERAL

501.1 Scope. Fire service features for buildings, structures and premises shall comply with this chapter. See also ORS 92.044, 203, 221, 195.065, 368.039, 478.920, OAR 918-480-0100 and Oregon State Fire Marshal Interpretation #94-02.

> ORS Chapters 92.044, 203, 221, 368.039, 195.065 and 478.920 and OAR Chapter 918 are not a part of this code but are reproduced or paraphrased here for the reader's convenience.
>
> ORS 92.044 is the adoption of standards and procedures governing approval of plats and plans; delegation to planning commission; fees.
>
> ORS 203 is the county bodies; county home rule.
>
> ORS 221 is the organization and government of cities.
>
> ORS 368.039 allows road standards adopted by local government to supercede standards in fire codes and requires consultation with local fire agency.
>
> ORS 195.065 requires local governments and special districts that provide urban service to enter into urban service agreements. For the purpose of this statute, "urban service" means: sanitary sewers, water, fire protection, parks, open space, recreation and streets, roads and mass transit.
>
> ORS 478.920 describes elements that may be included in the scope of a fire prevention code adopted by a rural fire protection district, including but not limited to mobile fire apparatus means of approach to buildings and structures, and providing fire-fighting water supplies and fire detection and suppression apparatus adequate for the protection of buildings and structures.
>
> OAR 918-480-0100 describes the procedure for approving the installation of automatic fire sprinklers where fire apparatus access or fire-fighting water supply do not meet local standards.
>
> ORS 479.200 regulates water supply requirements for certain public buildings erected after July 1, 1967, as defined in ORS 479.010(1)(1).
>
> OSFM Interpretation #94-02 recommends methods for calculating water supply requirements based on local conditions or ISO grading using Appendix B or NFPA 1142.

501.2 Permits. A permit shall be required as set forth in Sections 105.6 and 105.7.

501.3 Construction documents. Construction documents for proposed fire apparatus access, location of fire lanes and construction documents and hydraulic calculations for fire hydrant systems shall be submitted to the fire department for review and approval prior to construction.

501.4 Timing of installation. When fire apparatus access roads or a water supply for fire protection is required to be installed, such protection shall be installed and made serviceable prior to and during the time of construction except when approved alternative methods of protection are provided. Temporary street signs shall be installed at each street intersection when construction of new roadways allows passage by vehicles in accordance with Section 505.2.

SECTION 502
DEFINITIONS

502.1 Definitions. The following words and terms shall, for the purposes of this chapter and as used elsewhere in this code, have the meanings shown herein.

FIRE APPARATUS ACCESS ROAD. A road that provides fire apparatus access from a fire station to a facility, building or portion thereof. This is a general term inclusive of all other terms such as fire lane, public street, private street, parking lot lane and access roadway.

> **NOTE:** Specifications and standards for public streets are regulated by county or city governing bodies in accordance with ORS 368.039, wherein input from the fire service is required during planning for community development projects.

FIRE COMMAND CENTER. The principal attended or unattended location where the status of the detection, alarm communications and control systems is displayed, and from which the system(s) can be manually controlled.

FIRE DEPARTMENT MASTER KEY. A limited issue key of special or controlled design to be carried by fire department officials in command which will open key boxes on specified properties.

FIRE LANE. A road or other passageway developed to allow the passage of fire apparatus. A fire lane is not necessarily intended for vehicular traffic other than fire apparatus.

KEY BOX. A secure device with a lock operable only by a fire department master key, and containing building entry keys and other keys that may be required for access in an emergency.

SECTION 503
FIRE APPARATUS ACCESS ROADS

503.1 Where required. Fire apparatus access roads shall be provided and maintained in accordance with Sections 503.1.1 through 503.1.3 (see Appendix D).

503.1.1 Buildings and facilities. Approved fire apparatus access roads shall be provided for every facility, building or portion of a building hereafter constructed or moved into or

within the jurisdiction. The fire apparatus access road shall comply with the requirements of this section and shall extend to within 150 feet (45 720 mm) of all portions of the facility and all portions of the exterior walls of the first story of the building as measured by an approved route around the exterior of the building or facility.

Exception: The fire code official is authorized to modify Sections 503.1 and 503.2 where any of the following applies:

1. The building is equipped throughout with an approved automatic sprinkler system installed in accordance with Section 903.3.1.1, 903.3.1.2 or 903.3.1.3.
2. Fire apparatus access roads cannot be installed because of location on property, topography, waterways, nonnegotiable grades or other similar conditions, and an approved alternative means of fire protection is provided.
3. There are not more than two Group R-3 or Group U occupancies.

503.1.2 Additional access. The fire code official is authorized to require more than one fire apparatus access road based on the potential for impairment of a single road by vehicle congestion, condition of terrain, climatic conditions or other factors that could limit access.

503.1.3 High-piled storage. Fire department vehicle access to buildings used for high-piled combustible storage shall comply with the applicable provisions of Chapter 23.

503.2 Specifications. Fire apparatus access roads shall be installed and arranged in accordance with Sections 503.2.1 through 503.2.7.

503.2.1 Dimensions. Fire apparatus access roads shall have an unobstructed width of not less than 20 feet (6096 mm), except for approved security gates in accordance with Section 503.6, and an unobstructed vertical clearance of not less than 13 feet 6 inches (4115 mm).

503.2.2 Authority. The fire code official shall have the authority to modify the dimension specified in Section 503.2.1.

503.2.3 Surface. Fire apparatus access roads shall be designed and maintained to support the imposed loads of fire apparatus and shall be surfaced so as to provide all-weather driving capabilities.

503.2.4 Turning radius. The required turning radius of a fire apparatus access road shall be determined by the fire code official.

503.2.5 Dead ends. Dead-end fire apparatus access roads in excess of 150 feet (45 720 mm) in length shall be provided with an approved area for turning around fire apparatus.

503.2.6 Bridges and elevated surfaces. Where a bridge or an elevated surface is part of a fire apparatus access road, the bridge shall be constructed and maintained in accordance with AASHTO HB-17. Bridges and elevated surfaces shall be designed for a live load sufficient to carry the imposed loads of fire apparatus. Vehicle load limits shall be posted at both entrances to bridges when required by the fire code official. Where elevated surfaces designed for emergency vehicle use are adjacent to surfaces which are not designed for such use, approved barriers, approved signs or both shall be installed and maintained when required by the fire code official.

503.2.7 Grade. The grade of the fire apparatus access road shall be within the limits established by the fire code official based on the fire department's apparatus.

503.3 Marking. Where required by the fire code official, approved signs or other approved notices shall be provided for fire apparatus access roads to identify such roads or prohibit the obstruction thereof. Signs or notices shall be maintained in a clean and legible condition at all times and be replaced or repaired when necessary to provide adequate visibility.

503.4 Obstruction of fire apparatus access roads. Fire apparatus access roads shall not be obstructed in any manner, including the parking of vehicles. The minimum widths and clearances established in Section 503.2.1 shall be maintained at all times.

503.5 Required gates or barricades. The fire code official is authorized to require the installation and maintenance of gates or other approved barricades across fire apparatus access roads, trails or other accessways, not including public streets, alleys or highways.

503.5.1 Secured gates and barricades. When required, gates and barricades shall be secured in an approved manner. Roads, trails and other accessways that have been closed and obstructed in the manner prescribed by Section 503.5 shall not be trespassed on or used unless authorized by the owner and the fire code official.

Exception: The restriction on use shall not apply to public officers acting within the scope of duty.

503.6 Security gates. The installation of security gates across a fire apparatus access road shall be approved by the fire chief. Where security gates are installed, they shall have an approved means of emergency operation. The security gates and the emergency operation shall be maintained operational at all times.

SECTION 504
ACCESS TO BUILDING OPENINGS AND ROOFS

504.1 Required access. Exterior doors and openings required by this code or the *International Building Code* shall be maintained readily accessible for emergency access by the fire department. An approved access walkway leading from fire apparatus access roads to exterior openings shall be provided when required by the fire code official.

504.2 Maintenance of exterior doors and openings. Exterior doors and their function shall not be eliminated without prior approval. Exterior doors that have been rendered nonfunctional and that retain a functional door exterior appearance shall have a sign affixed to the exterior side of the door with the words THIS DOOR BLOCKED. The sign shall consist of letters having a principal stroke of not less than 0.75 inch (19.1 mm) wide and at least 6 inches (152 mm) high on a contrasting

Attachment 2

David Beam

From: Barton Brierley
Sent: Monday, December 14, 2009 8:19 AM
To: David Beam
Subject: FW: Affordable Housing

Please forward to the PC and Housing Committees in their packets.

Barton Brierley, AICP
Planning and Building Director
City of Newberg
P.O. Box 970, Newberg, OR 97132
503-537-1212 Fax 503-537-1272
barton.brierley@newbergoregon.gov

-----Original Message-----
From: Roy Gathercoal [mailto:rgathercoal@verizon.net]
Sent: Friday, December 11, 2009 8:42 PM
To: Barton Brierley
Subject: Affordable Housing

Hi, Barton.

I do miss seeing you.

Thank you for sending me the meeting notice for the next stage in planning, tonight's (last night?'s) meetings about affordable housing.

I had planned on making an Herculean effort to get there, but I just can't make it up and out of the house. So I'm stuck on the sidelines.
As you know I am extremely concerned about the effects the lack of affordable housing on our town. This is not in my role as former Habitat for Humanity person, but as citizen, husband, wife, friends and participant in our neighborhood.

I do appreciate seeing the parking space reduction being reduced as a very good thing. That will likely help a lot. My understanding (more-or-less complete before my February 2002 departure from work and nearly non-existent since then) is that this parking thing is the piece that ended up compromising our East 2nd Street project?

This was a hard blow for us. We believed that by buying medium-density property we would be able to take advantage of the economies of scale, thus reducing the cost-per-family for each home built. At six homes, the $250,000 price for a lot works out to $41,666; the price per/lot for a lot dividable into 4 lots would be $62,500. There are many families currently living in rental units who could stretch a bit and save ahead a bit to afford a lot at $41,666--once you add in permits and assessments, first year taxes and the cost of actually building the house, we are still within reach of a $95,000 house. Once you jump to the $62,500 lot price, however, you now are at about $106,000. That is a big jump when you are trying to secure financing. Further, many of the add-ons will increase in price as well, for they are based at least in part on a sliding scale based on estimated final house sale price.

It might be wise to look at the issue from a different perspective.
Temporarily setting aside all arguments about ethical issues, strategic use of codes to prevent integration of different Socio-economic strata into the community, and the impossible fantasy of a community of a shrinking population--to return us to a mis-remembered 1957,

we end up with a very straightforward problem. The number of people who work in Newberg and who cannot afford to live in Newberg is rising and the number of people who live in Newberg who work in the metro area also is increasing. Thus we have traffic problems, as well as hard situations for our local businesses, difficulties in raising funds for city, CPRD, fire, public safety and library facilities and a general apathy toward the community

which is an understandable response to a place "where my bed happens to be. . ."

This overall comment is a plea to making all the decision-making bodies aware that every policy and decision (one aspect of "policy" being "to decide in advance") that fails to narrow the gap between what people in Newberg earn and what they will have to pay for housing, must be of serious concern.

A second concern is the way that our planning goals are established. I might be entirely off, here, so I'll ask your pardon in advance. I don't have access to many of the records required to figure this out, and frankly, don't have the time, energy or inclination to invest the energy it would probably require.

I understand that the State of Oregon has a strategic plan, in which future estimated needs for industrial, residential, commercial, etc.
land must be factored in and available land in each category tallied separately. Thus if our projections are for a 20% growth rate in 10 years, our plan must show that we have at least 20% more land available for new residential construction.

The two major urbanized areas in the state, Tri-met and Eugene-Springfield, exceed the cut-off size and so must submit their own plans. All geographically bound government units in the state must likewise submit their own area's information so that the State Plan may be compiled with local data.

This is one of the central pillars of Oregon's Land Use Laws in that it forces communities to look ahead and to ensure they are prepared for expected growth without making mid-stream decisions that will result in people being squeezed out. At least at the city level, a citizen can go to a map and see just where the next generation of housing will begin, and which areas will be further served by new commercial building.

Yet is it the case--as it appears to this novice--that the housing assumptions for Newberg's future growth make the assumption that R-2 lots will have two family units per 5,000 sq. ft lot. The situation with occupied houses in these large R-2 zones seems to be just one house per 5,000 sq. ft. lot.

Am I correct in this?

If so, we need to do some quick re-thinking about city zones and their power to support or to obscure our land's ability to sustain houses. I am concerned that as the ten-year period winds down, and if we are in the ballpark with estimates of population growth then we vulnerable to a systemic shock--our available zoned land will not be sufficient for our population!

The thing I find most troubling about this issue is that most people won't even know what is happening, or rather, will see the sudden influx of multi-family units and will blame the city for not preventing these from being built. Or, we will simply ignore the situation and pour thousands of people into the backyards of Yamhill, Carlton, Dayton and even Amity. Thus we end up with insufficient policy directly and negatively impacting the quality of life in our area and its environs.

The planning and permits areas conduct an informal self study to evaluate how the permit process could be restructured to make it easier for folks to build affordable housing. I do realize, of course, that building a home is a complicated thing, but if we want to provide an extra emphasis to projects with substantial affordable housing components this has got to be a piece of the picture.

The process of going through the planning and permits lines is daunting for most people; experienced builders in and from this area perhaps excluded. If affordable housing is to occur organically in our community, rather than by legislative fiat, either the planning and permitting costs need to be substantially dropped, much experienced competence in working with the City of Newberg on planning/building residential projects needs to be provided at no or low cost to parties working to build more affordable housing, or the governmental units themselves will need to step in and provide direct assistance.

The third of these three options is the most likely to have the biggest impact, although if affordable housing goals in the city are to be seriously pursued, some combination of all three will be the best course.

In communities across the nation, especially where the latest recession hit while still reeling from the recessions of the 1970s and 1980s, city governments have come to realize the tremendous cost to their city of a lack of housing for the people who live there. As a result they have consciously decided to move ahead with aggressive projects designed to turn around neighborhoods, to get people's living and working addresses closer to one another, and to ensure that disease, illness and exposure-related medical conditions do not negatively impact the community's overall health.

Some of these cities have donated land to not-for-profit groups pledged to build affordable housing for the residents or workers of that city.
Some have even installed all of the hook-ups to water, electricity, telephone, sewer and storm sewer systems so that when the group assembles to start building, much of the more technically challenging and time consuming work has been completed; the builders simply need to mount their sills into the concrete slab and start hammering.

There are people, no doubt, in the community who would oppose such a plan. Yet after visiting many of these Habitat communities--long after many of the original occupants have moved on for one reason or another and the property has been sold and resold--I am convinced that a few solid "missionary plants" of working families who are already established in the neighborhood (but forced, because of cost, to commute from their apartments elsewhere to work here in Newberg) will make a lasting positive impact on the surrounding neighborhood.

It is in the interest of the City of Newberg to promote the construction of housing which is affordable for the people who work here. Large "rush hour" traffic jams expressed in intermittent clogs from Rex Hill to the Western city limits of Dundee are not healthy for the people stuck in the commute, unhealthy to our children breathing all the fumes kicked out of idling cars and trucks, and it is clearly in the interest of Newberg's citizens to be able to offer up-to-date and satisfactory fire, public safety, recreational and library services to one another. It is good for all of us to see our downtown core area flourish and our businesses able to make a go of their investments and efforts.

The chronic shortage of affordable housing makes each of these aspects of the interests of Newberg less likely.

I hope to see the day when a group of people, energetic about the future of our town, are able to do some fund raising to buy a buildable lot on which to build one or more homes. I hope they will be able to walk into the city building office and be greeted by a city employee whose job it is to shepherd the process of permitting and planning of affordable housing projects. The criteria for what constitutes "affordable housing"
would be stated and public--probably based somehow on the mean income of families working in Newberg.

The idea, and justification for each of these is that there is a legitimate and actual public policy benefit for the city in specifically working to close the horrendous gap between "what people who work here can afford" and "what jobs are available to people who live here." It would be tragic if we were to end up looking like a tourist town or ski town, where the employees are transferred by bus to and from their homes--several miles away from and out of sight of those who come here to ski.

I hope you see me as an ally, Barton, if not a particularly effective ally. I will be able to help as I can, if there is some task I could complete from bed.

Thank you for your work here in our town.

Roy

PS what is the status of the big N. College accessible transportation project? Did we get funded? If not, to whom will we be applying next?
This is a project of massive importance to Newberg. If we can provide a safe walkway from all the new building clustered around College--to schools, the Senior Center and to

downtown--people will have many more factors encouraging them to walk or bike to do a few errands rather than driving.

--

Roy Gathercoal

2504 Haworth Avenue
Newberg, Oregon 97132
United States of America

503.537.1162

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avast! Antivirus: Outbound message clean.
Virus Database (VPS): 091211-0, 12/11/2009 Tested on: 12/11/2009 8:42:29 PM

Affordable Housing Action Plan

Proposed Development Code Amendments

Planning Commission
January 14, 2010

Attachment 3

Affordable Housing Action Plan

Proposed Changes

- Add a definition regarding "special needs housing";
- Clarify that the planning process for the recommendation that accessory dwelling units be an allowed use in the R-1 and R-P zones instead of the current conditional use would be an administrative Type 1.

Affordable Housing Action Plan
Proposed Changes

- Allow reduction of parking requirements where an affordable housing development is near a transit stop or where the development provides its own transit; and,
- Modify current driveway standard to allow more than two lots per driveway.

Proposed definition of "special needs housing"

Group housing specially designed or adapted for those with particular physical, developmental disability, or social needs.

January 14, 2010

Action 4.2G - Reduce and provide flexibility to parking requirements for affordable housing projects.

Reduce parking requirements where the development is within 1,500 feet of a transit stop or where the development provides its own transit.

Suggested Development Code language

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 and average of less than one hour regular service during the daytime or where the development provides its own transit. A developer may qualify for this parking reduction if improvements on a proposed pedestrian route are made by the developer, thereby rendering it an adequate continuous route.

Action 4.2L – Modify driveway standard to allow more than two lots per driveway

Advantages

- Driveways cheaper to build than public streets
- City doesn't maintain private driveways
- Access to "odd" lots

Issues

- Parking on driveway can impede fire access
- Potential for more neighbor conflicts
- Multiple parallel driveways
- Landscaping maintenance

Action 4.2L – Modify driveway standard to allow more than two lots per driveway

Proposed development code change

- *Allow 3 to 6 lots per shared driveway*

Proposed mitigation measures

- *Require 1 additional parking space for a single family or a duplex on a single lot*
- *Require recorded maintenance agreement*

Current driveways

0 15 30 60
Feet

Illinois St.

January 14, 2010

Current driveways

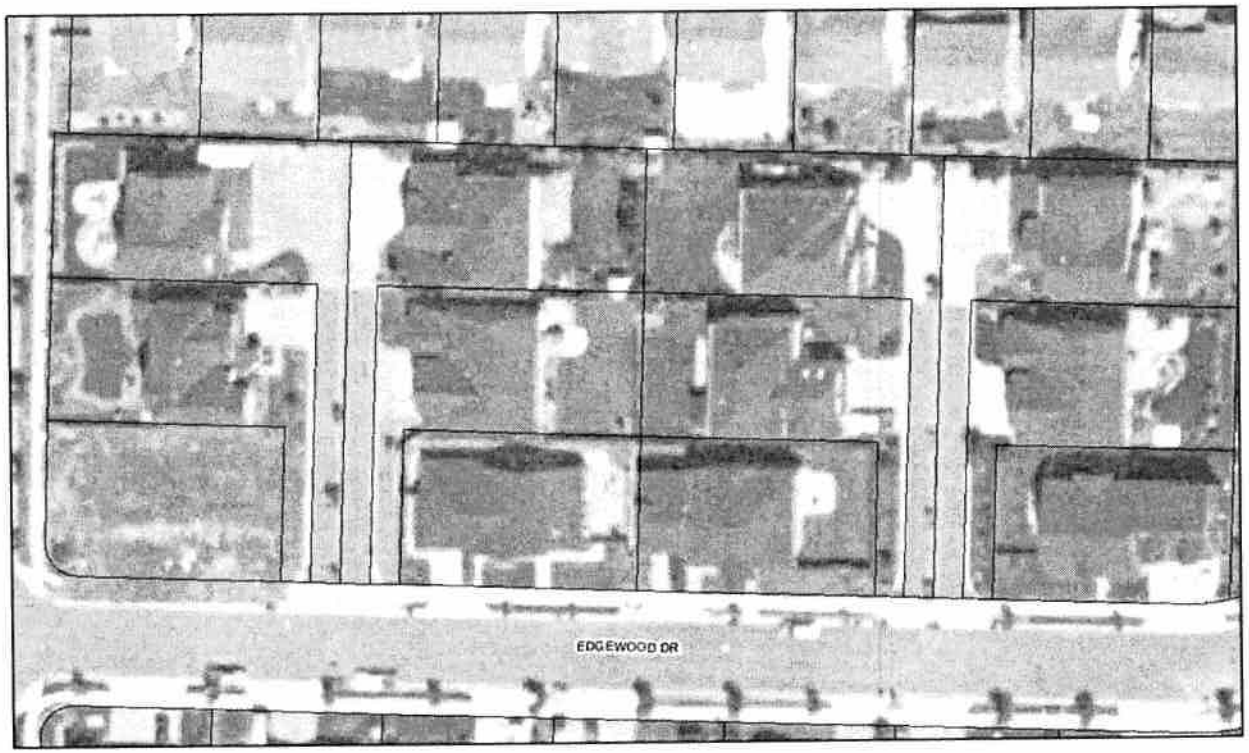
0 15 30 60
Feet

E. Edgewood Drive

January 14, 2010

January 14, 2010

Current driveways

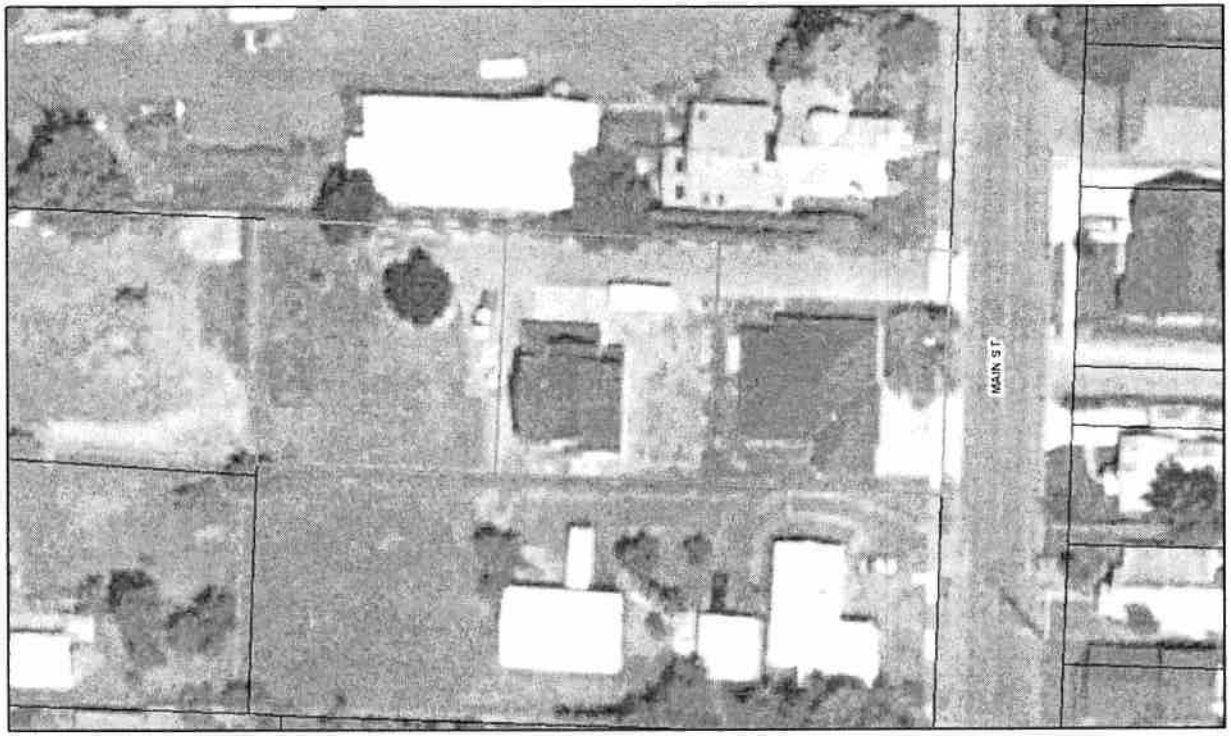


0 15 30 60
Feet

Edgewood Drive

January 14, 2010

Current driveways



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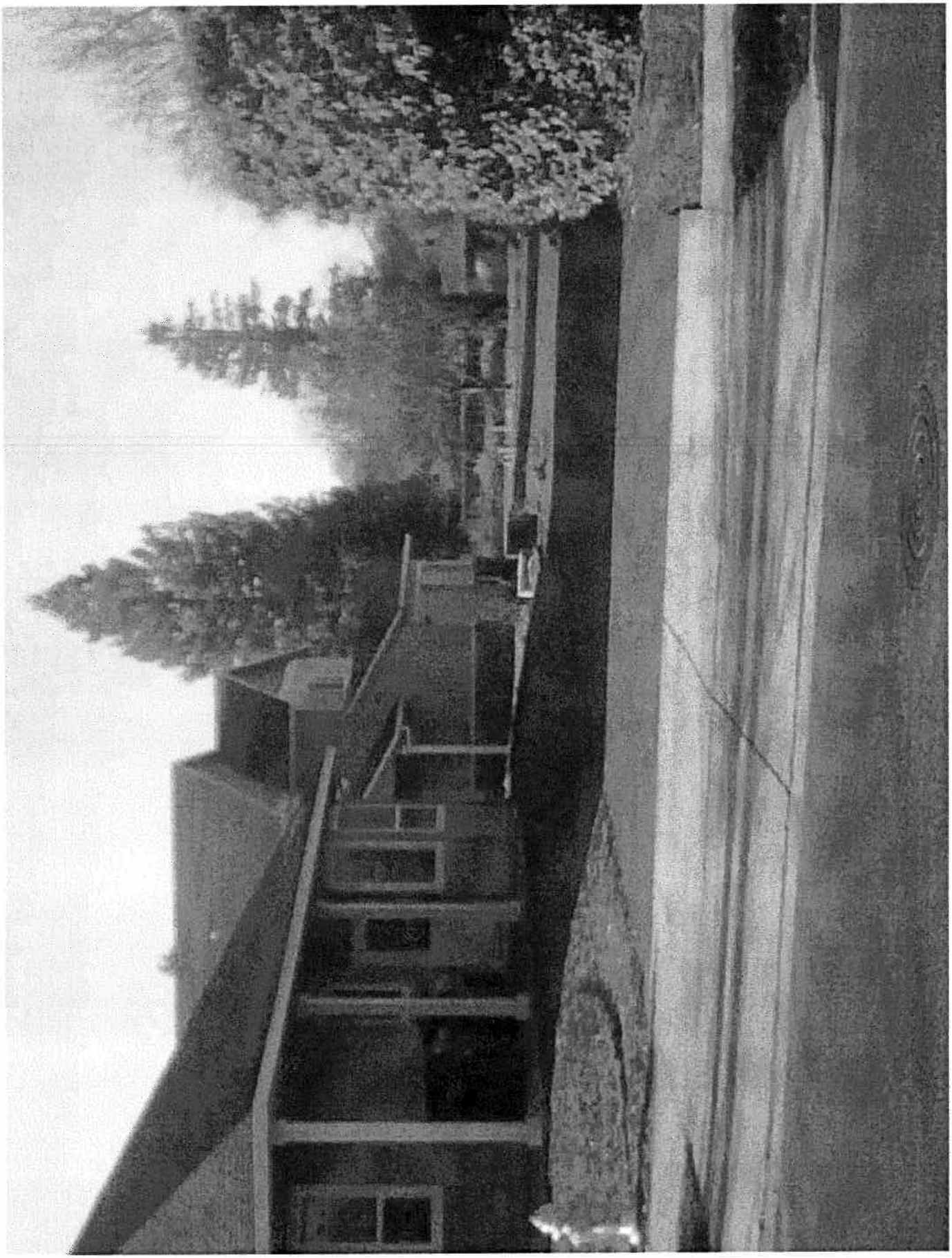
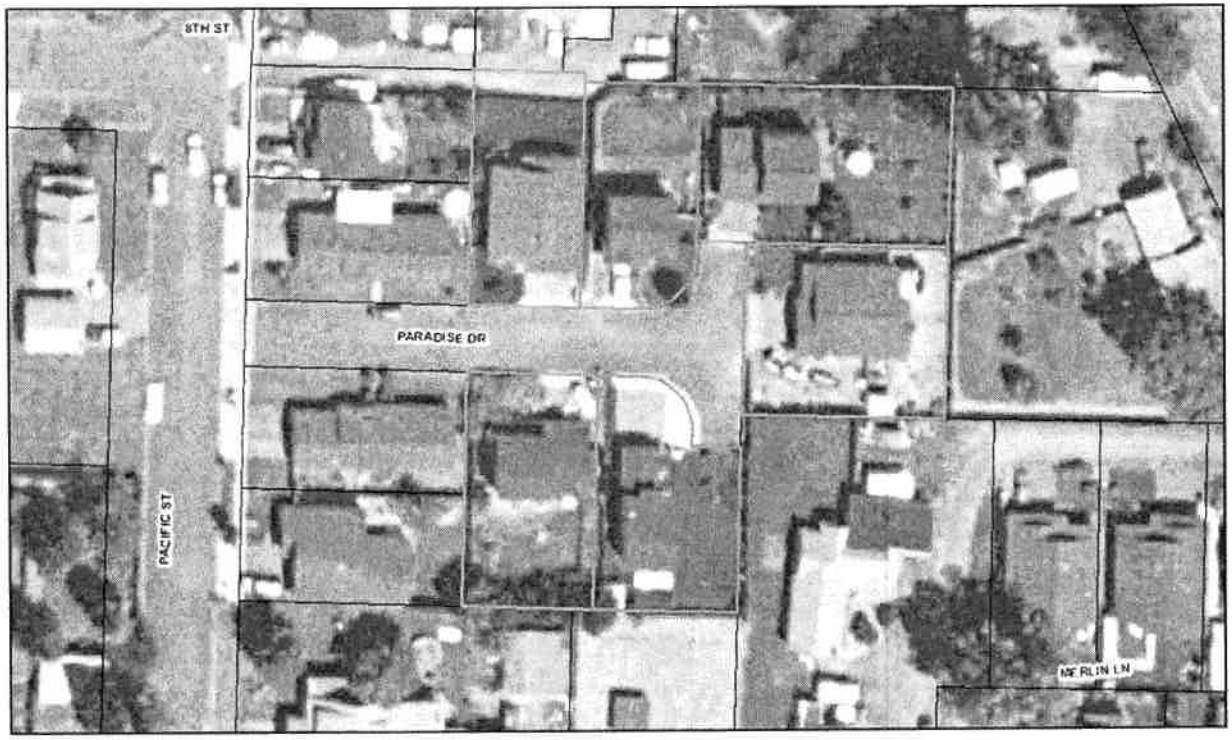
Feet

N. Main St.

January 14, 2010



Current driveways



0 15 30 60
Feet

Paradise Dr.

January 14, 2010

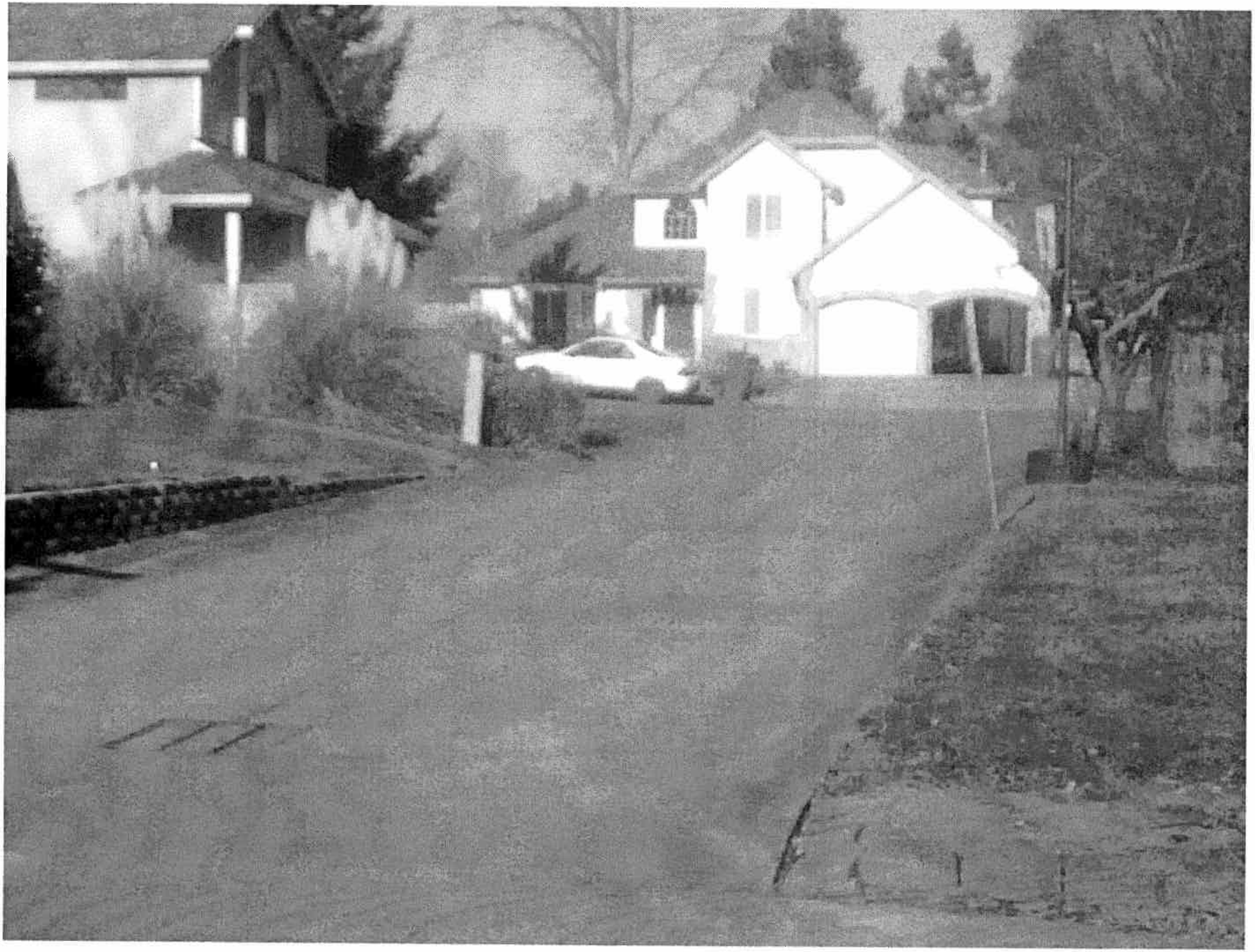
January 14, 2010

Current driveways

0 15 30 60
Feet

Trestle View Ct.

January 14, 2010



Questions?

City of Newberg

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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)***

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.

DATED this 14th day of January, 2009.

AYES: NAYS: ABSTAIN: ABSENT:

ATTEST:

_____
Planning Commission Secretary

_____
Planning Commission Chair

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

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Exhibit A

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 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 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

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[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

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[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.*

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[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:

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[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

Household Income*	Newberg		Yamhill County		PMSA		Oregon	
	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

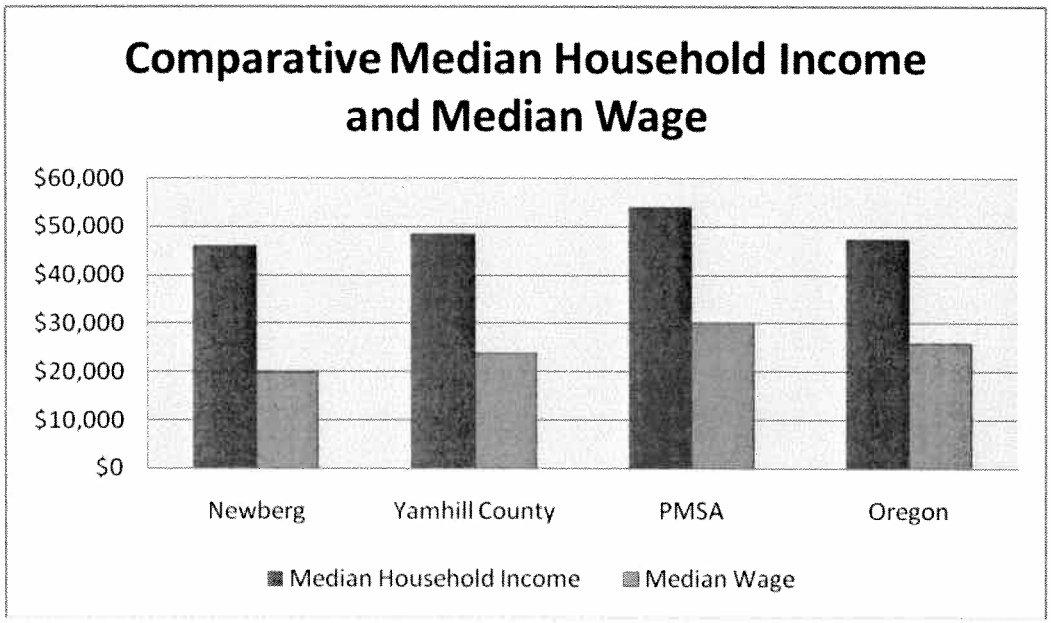
Table 12- 7 compares the median household income and median wages for Newberg, Yamhill County, the PMSA, and the state of Oregon. Figure 12- 1graphically shows that Newberg is behind Yamhill County and the PMSA in median household income and median wage.

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



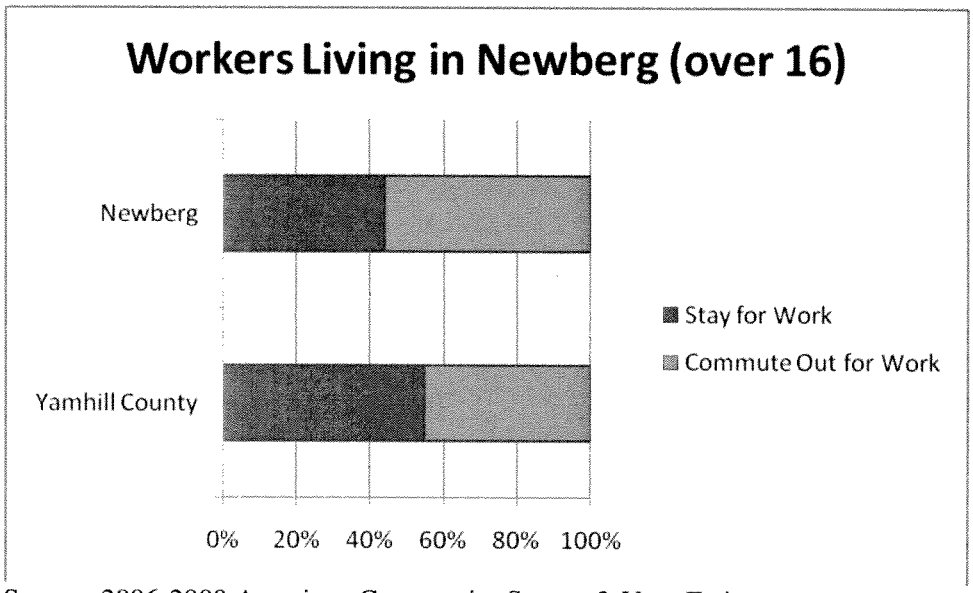
Source: U.S. Census Bureau, 2005-2007 American Community Survey 3-Year Estimates

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

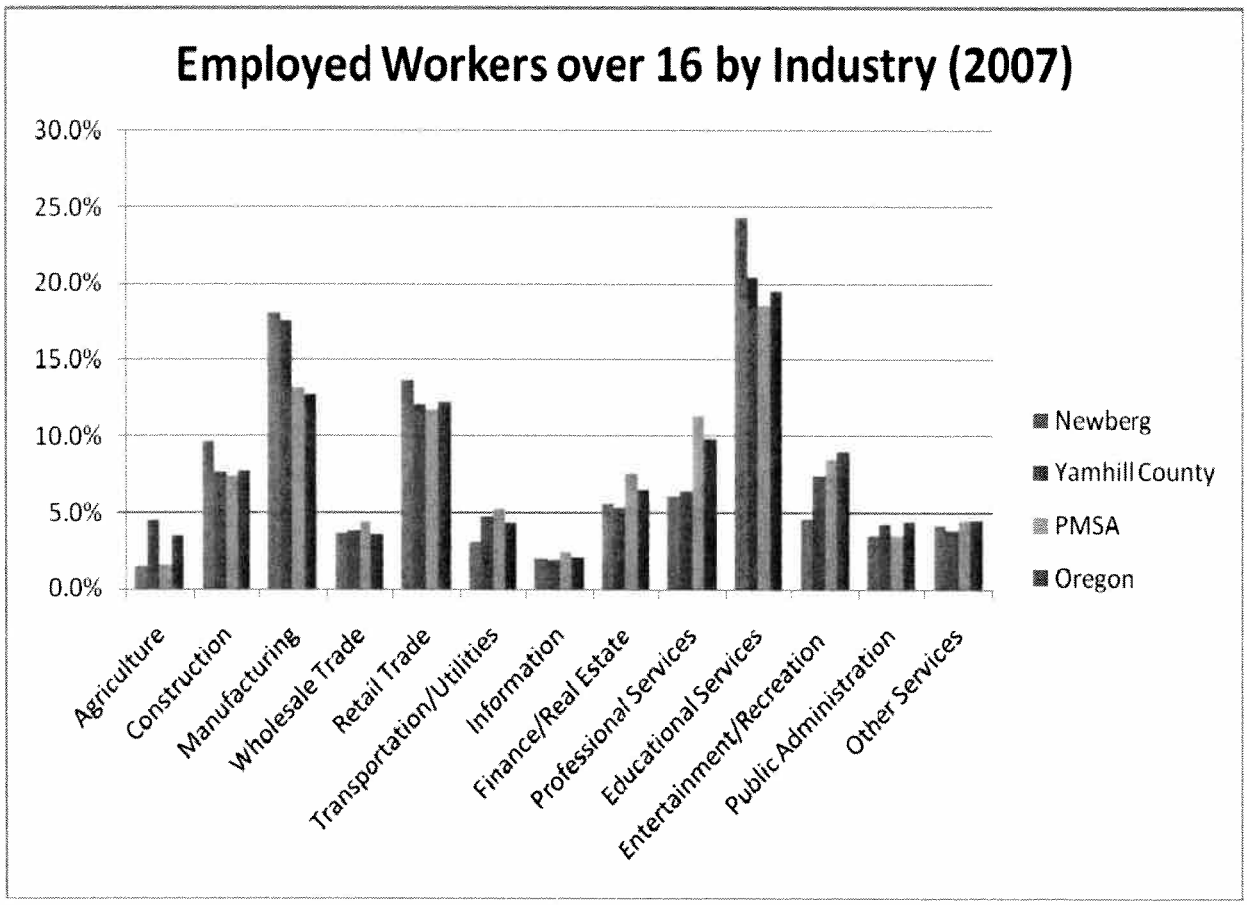
expressed through Newberg's Central Business District, which consists of many early twentieth century buildings constructed in a high-density pattern.

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**	**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)[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	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

(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:

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[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)

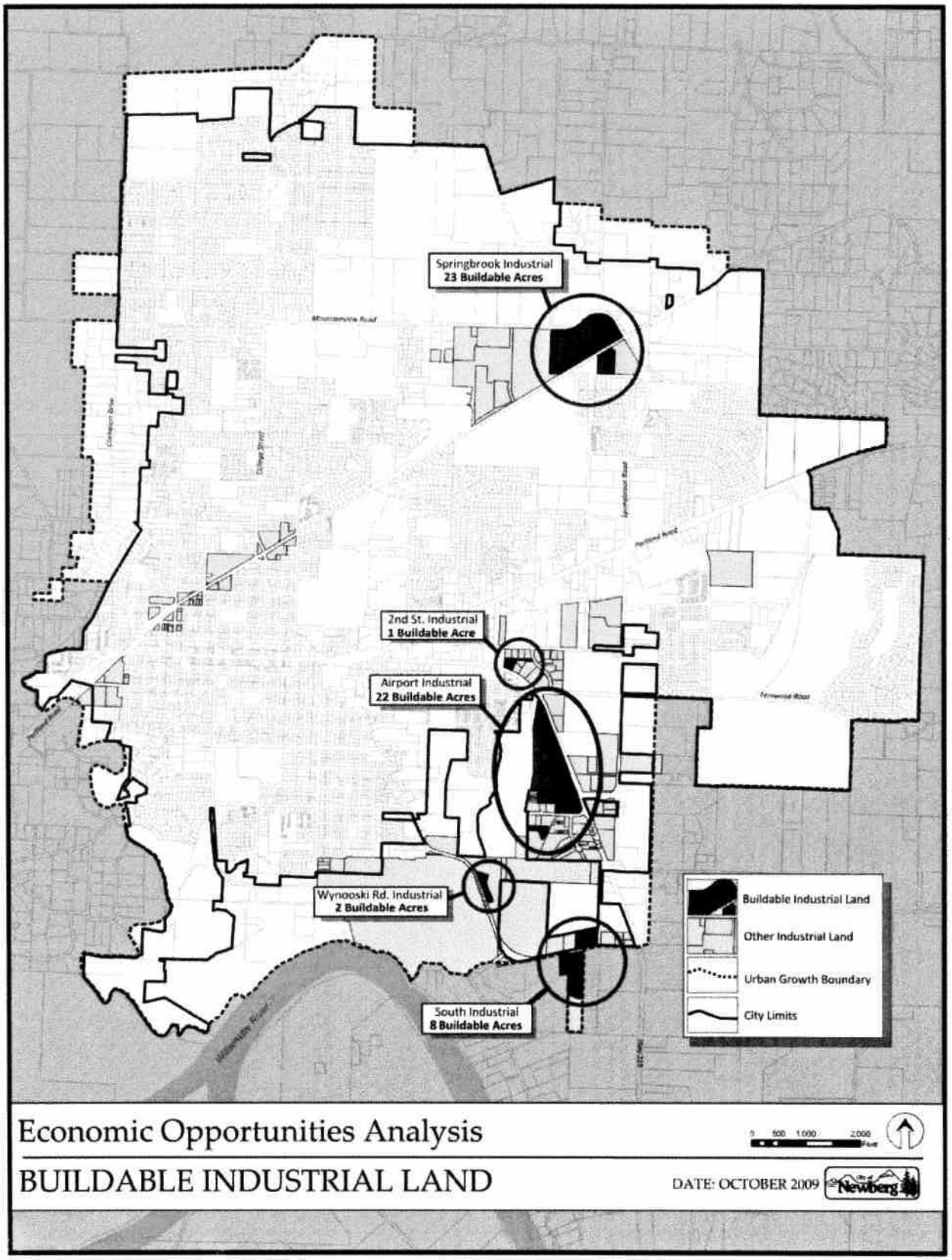
Location	Potential Uses	Buildable Acres	Site Sizes				
			< 2 ac.	2-10 ac.	10-30 ac.	30-50 ac.	Total
Springbrook Employment	Light Manufacturing or Industrial Office	23		1	1		2
Sportsman Airpark[51]	Airport Industrial	22	2	4			6
Wynooski Industrial	Light Industrial	10	1	2			3
Elliot Road Industrial	Light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

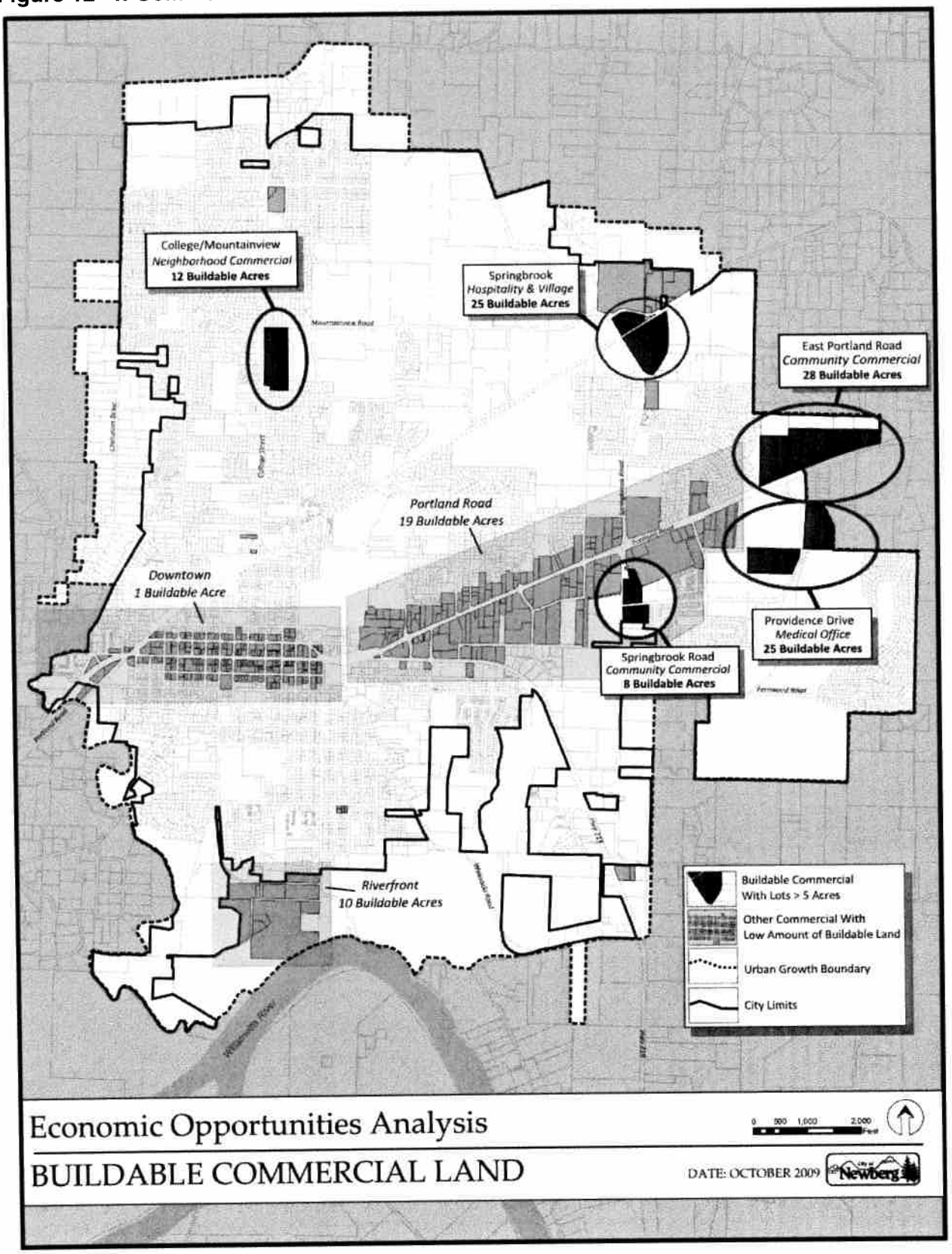
Table 12- 31: Commercial Land Supply and Need

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
Planning Commission Resolution 2009-275

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 2004~~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 Planning Commission Resolution 2009-275

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. 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.

(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. ORS 197.712 Commission duties; comprehensive plan provisions; public facility plans; state agency coordination plans; compliance deadline; rules.

(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.

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

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

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

Table 12- ~~24~~30: Buildable Commercial Land in Newberg UGB (2009) 57
Table 12- ~~25~~31: Commercial Land Supply and Need 58

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

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[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

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[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

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[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.*

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[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:

> *Unavailable Land in Strategically Significant Employment Areas*
> *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*

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[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:

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[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

Household Income*	Newberg		Yamhill County		PMSA		Oregon	
	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

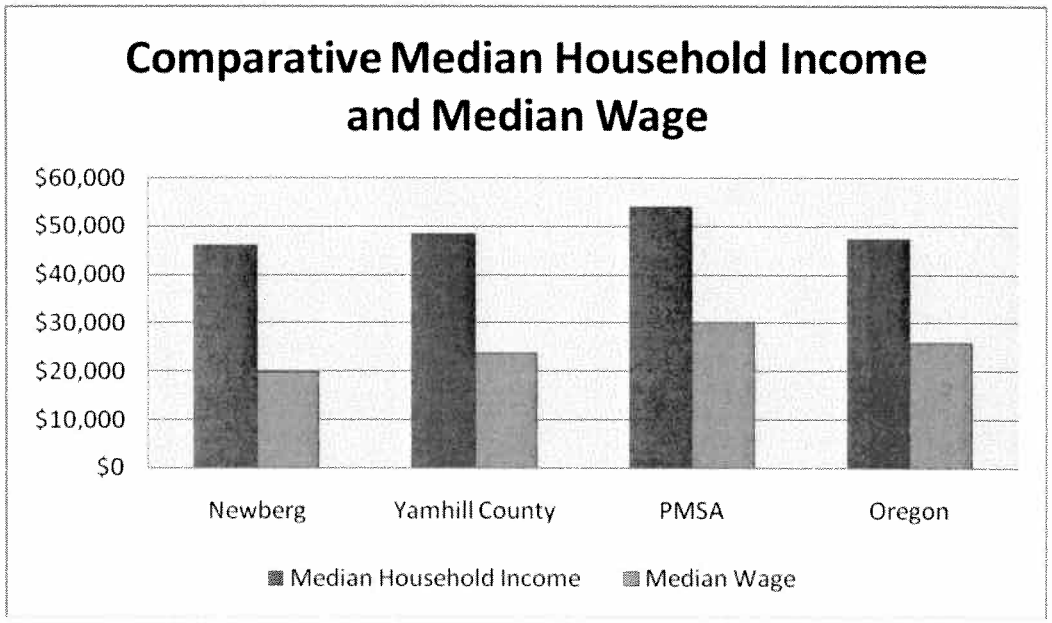
Table 12- 7 compares the median household income and median wages for Newberg, Yamhill County, the PMSA, and the state of Oregon. Figure 12- 1graphically shows that Newberg is behind Yamhill County and the PMSA in median household income and median wage.

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



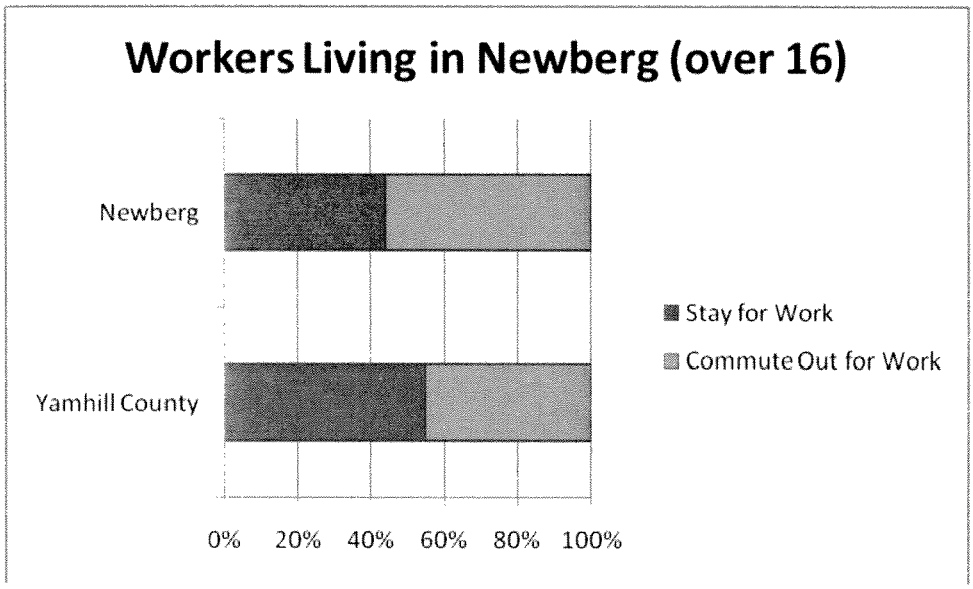
Source: U.S. Census Bureau, 2005-2007 American Community Survey 3-Year Estimates

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

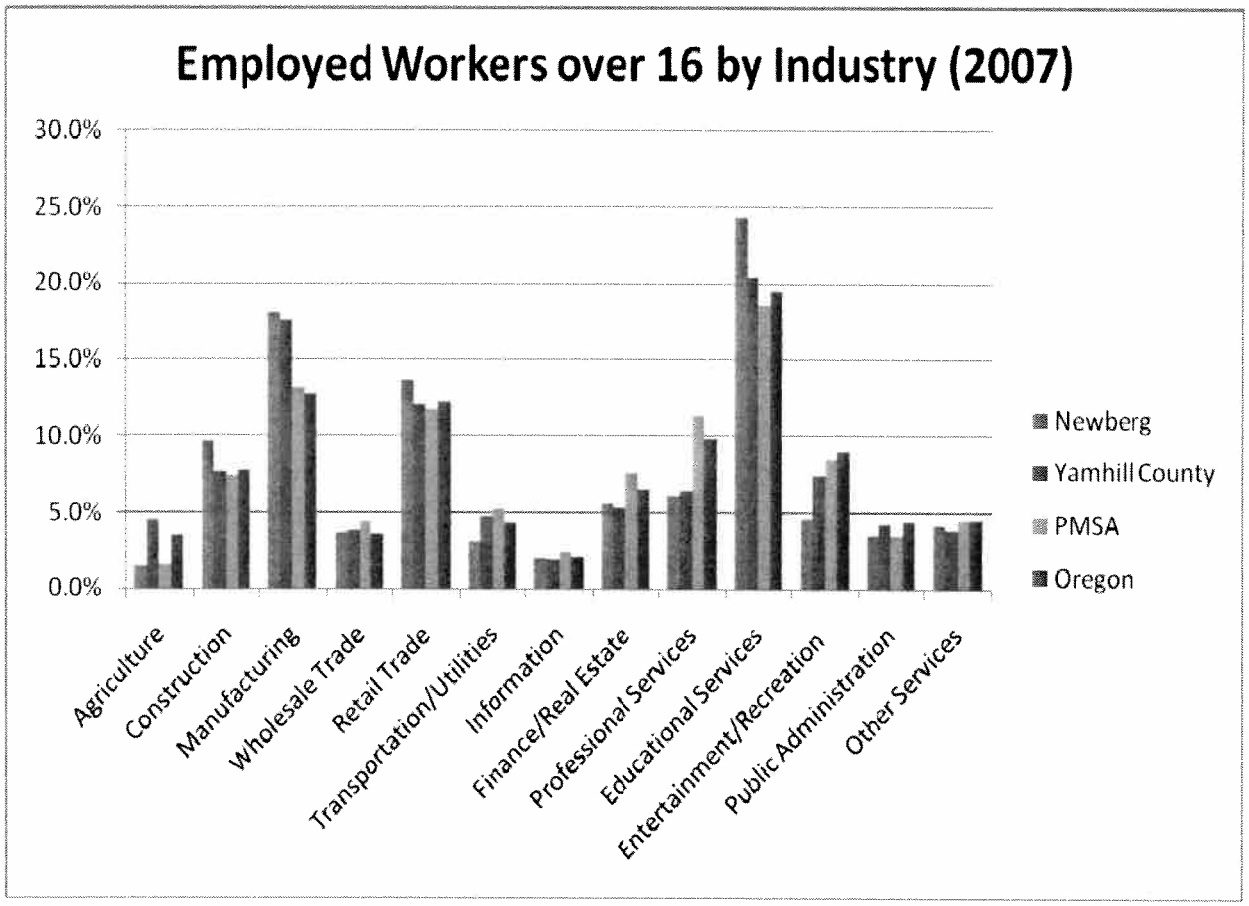
expressed through Newberg's Central Business District, which consists of many early twentieth century buildings constructed in a high-density pattern.

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*

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.

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.

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.

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[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

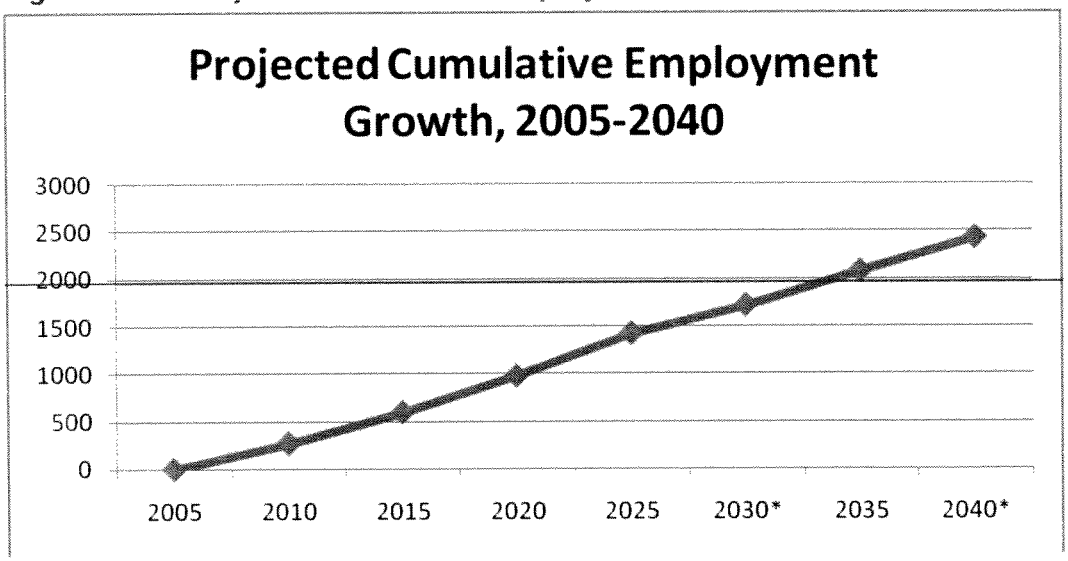
To encourage and accommodate future commercial and industrial growth, Newberg must have developable land readily available with characteristics necessary to be competitive in the regional economic development market. Newberg's Ad Hoc Committee on Newberg's Future recently completed an analysis of the 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.~~

~~**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	[illegible]	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

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)

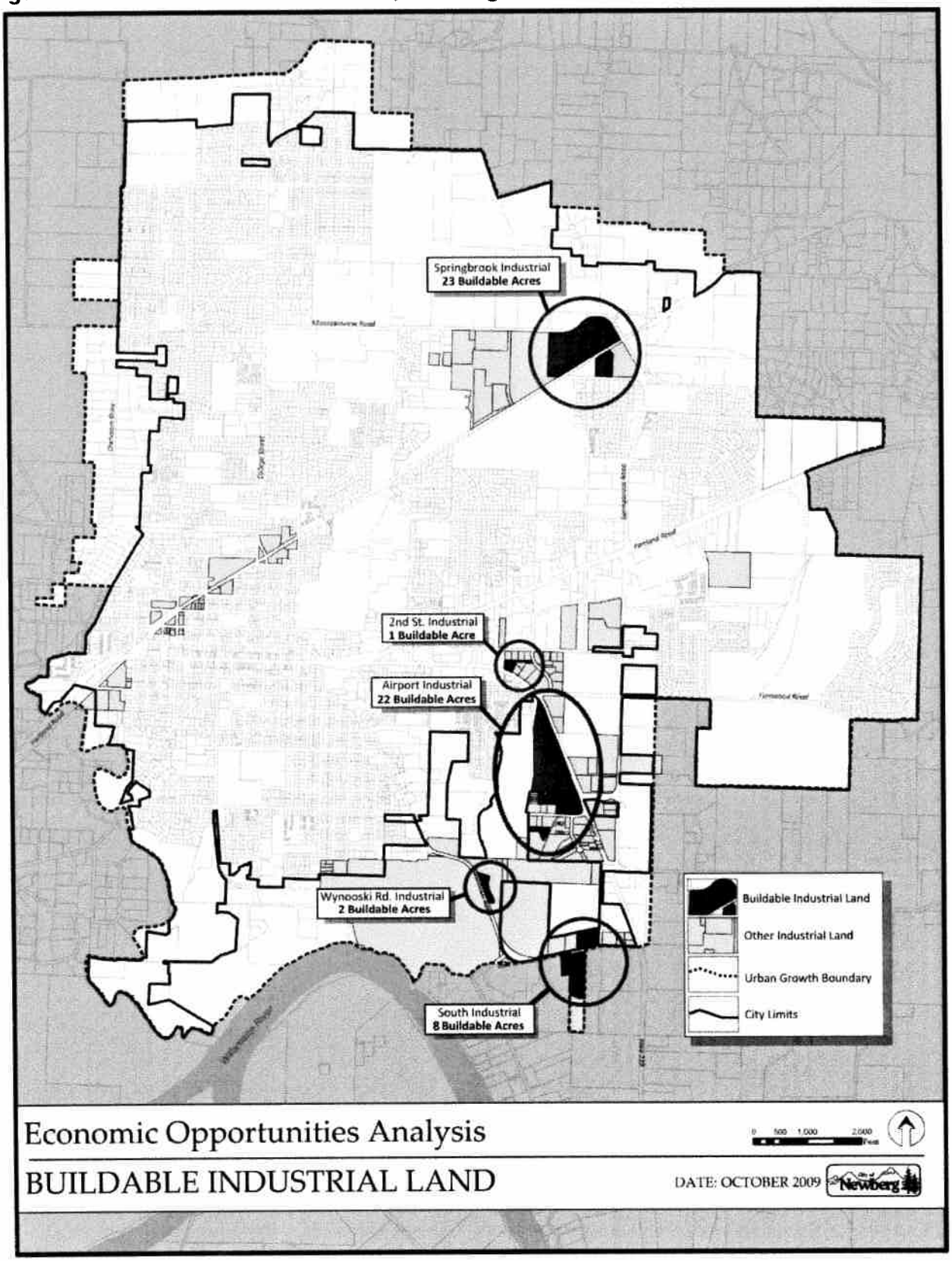
Location	Potential Uses	Buildable Acres	Site Sizes				
			< 2 ac.	2-10 ac.	10-30 ac.	30-50 ac.	Total
Springbrook Employment	Light Manufacturing or Industrial Office	23		1	1		2
Sportsman Airpark[52]	Airport Industrial	22	2	4			6
Wynooski Industrial	Light Industrial	~~9~~10	1	2			3
Elliot Road Industrial	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.

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.

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.

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

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.

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**

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

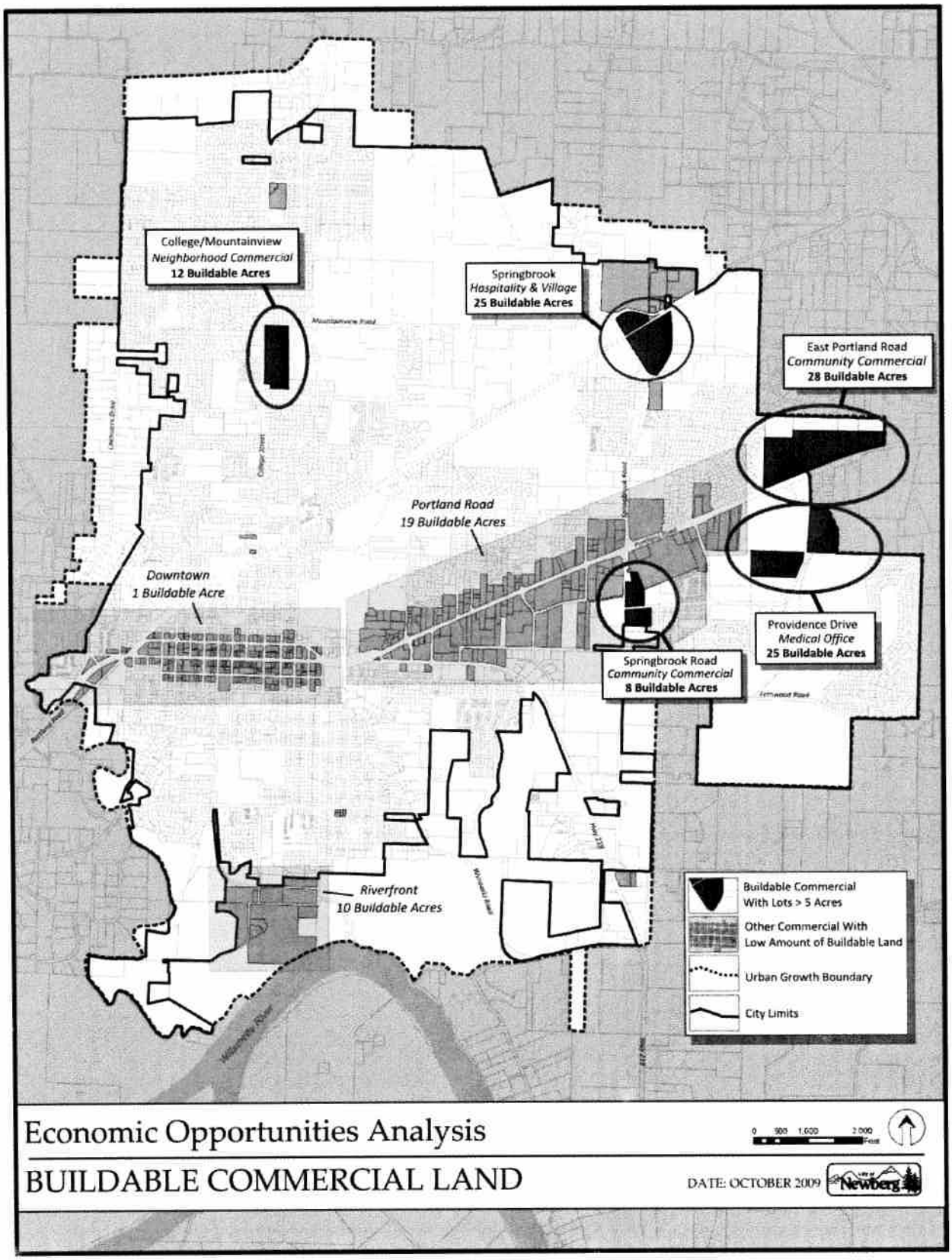
Type	Buildable Acres Needed 2010-2030	~~Land~~Buildable Acres in 2009 UGB	Surplus or (Deficit)	Buildable Acres Needed 2031-2040
Office	~~20~~19	25	~~5~~6	~~17~~15
Retail	~~101~~105	95	(~~6~~)10)	~~51~~61
Total	~~121~~124	120	(~~1~~)4)	~~68~~76

~~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.

Attachment 2

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

Attachment 3

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
Desk: 503.373.0050 x 259 | Fax: 503.378.5518
steve.oulman@state.or.us | www.oregon.gov/lcd

Attachment 4

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

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 0 4 2009

December 10, 2009

City of Newberg

Planning Commissioners,

RECEIVED
DEC 10 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

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

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. The City should plan to use land in the future more efficiently than it has in the past.

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.

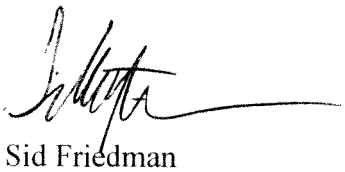
The expansion of existing industrial users is a key component of Newberg's economic strategy and they are a key component of the city's targeted industry clusters. The availability of land for their expansion is an advantage, not a disadvantage. At any rate, these sites will certainly absorb some of 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

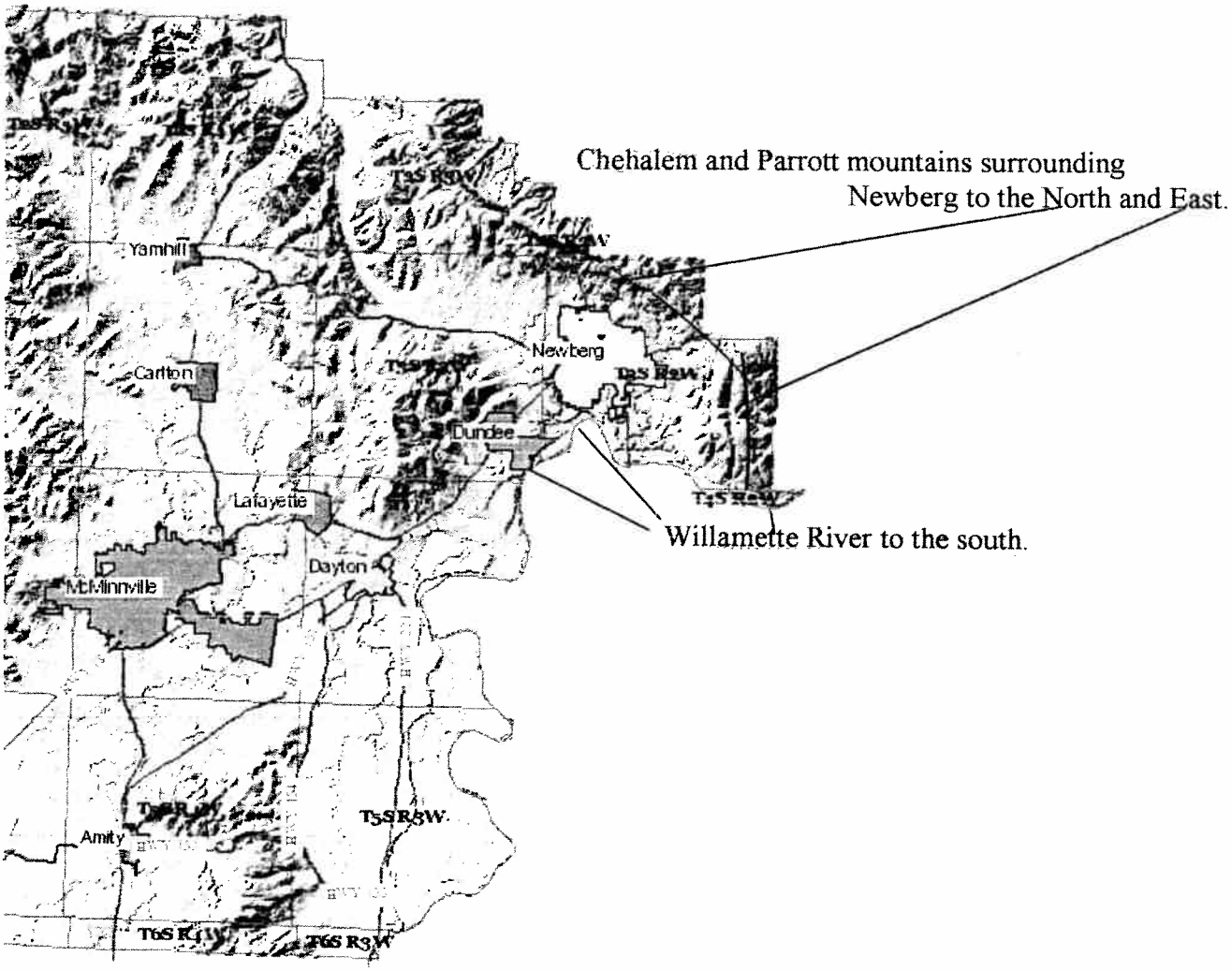
/S/

Ilsa Perse
Friends of Yamhill County

Cc (electronic): DLCD
Yamhill County Planning Department
Oregon department of Agriculture

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.

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.

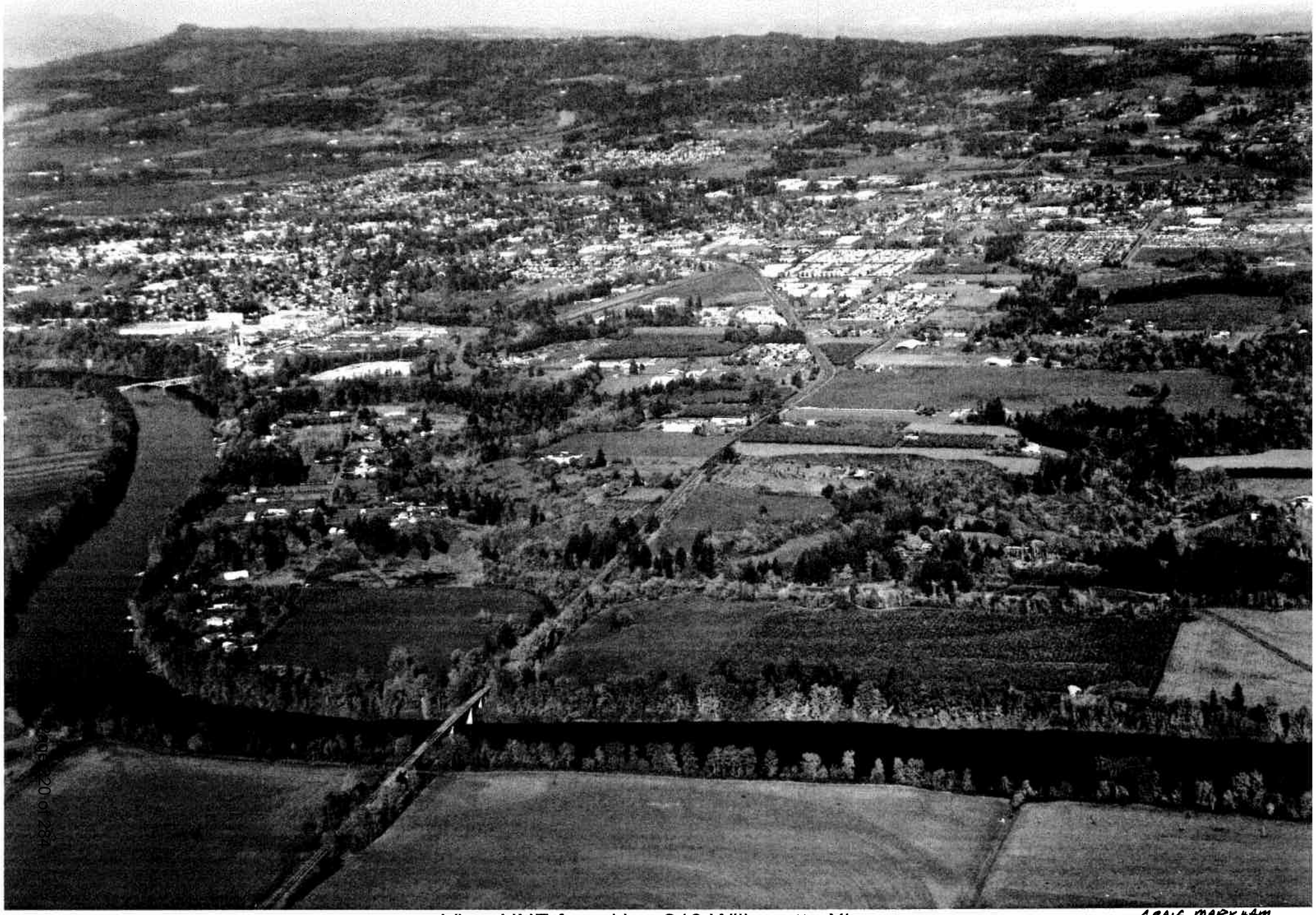
Finally, we applaud the city for at least recognizing the value of "agri-tourism". I personally spent nearly twenty years of my life as a manager in the tourism industry, and can tell you that Newberg has considerable untapped potential to attract high-paying clientele on a year-round basis. Possibly 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, PhD.



View NNE from Hwy 219 Willamette Xing

CRAIG MARKHAM
1 NOV 09

VIEW N FROM WILLAMETTE R. FROM HWY 219 BRIDGE (LOWER RIGHT)

CRAIG MARKHAM
1 NOV 09

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.

520 SW SIXTH AVENUE, SUITE 914 PORTLAND, OR 97204 503/295-7832 503/295-1107 (FAX)

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

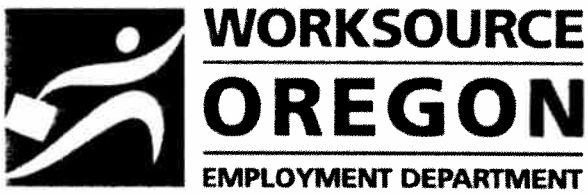
	Net New Demand for Land (acres) By Scenario From 2004 Through:					
	Medium Growth		High Growth		Low Growth	
Use	2025	2040	2025	2040	2025	2040
Office	14.8	27.1	20.5	37.8	13.7	24.8
Industrial	34.7	63.8	85.6	161.4	27.0	49.3
Retail	96.2	178.3	167.4	310.7	76.8	135.2
Total	**145.7**	**269.2**	**273.5**	**509.9**	**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.

Attachment 6



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)

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)

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)

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
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)

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
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)

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.

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

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)

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.

OREGON EMPLOYMENT DEPARTMENT

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

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
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)

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)

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
43-6013	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)

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.

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

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)

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		

Occupational Employment Projections, 2008-2018

Region 3 (Marion, Polk, and Yamhill counties)

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)

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

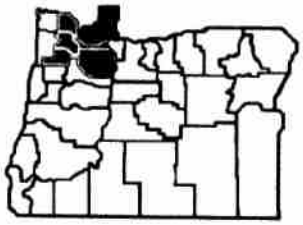
Region 3 (Marion, Polk, and Yamhill counties)

Workforce and Economic Research
November 2009

Standard Occupational Classification Code and Title		Employment 2008	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
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



WORKSOURCE OREGON EMPLOYMENT DEPARTMENT

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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

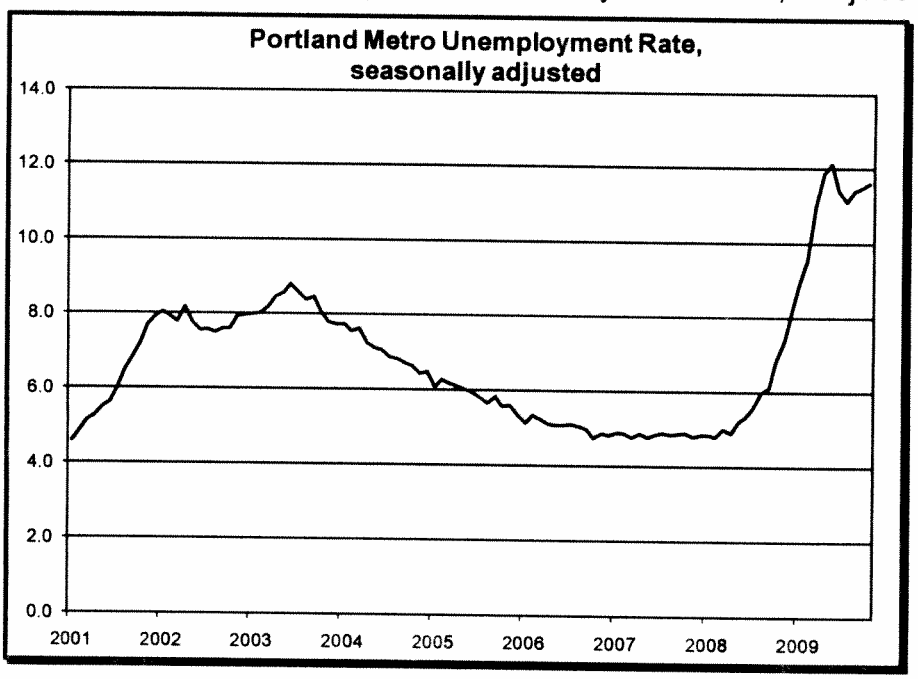
The Portland metro area's seasonally adjusted unemployment rate was essentially unchanged at 11.6 percent in October. The revised September rate was 11.5 percent, and the year-ago rate was 6.8 percent. An estimated 125,700 area residents were unemployed in October; 50,800 more than one year ago. To be 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.

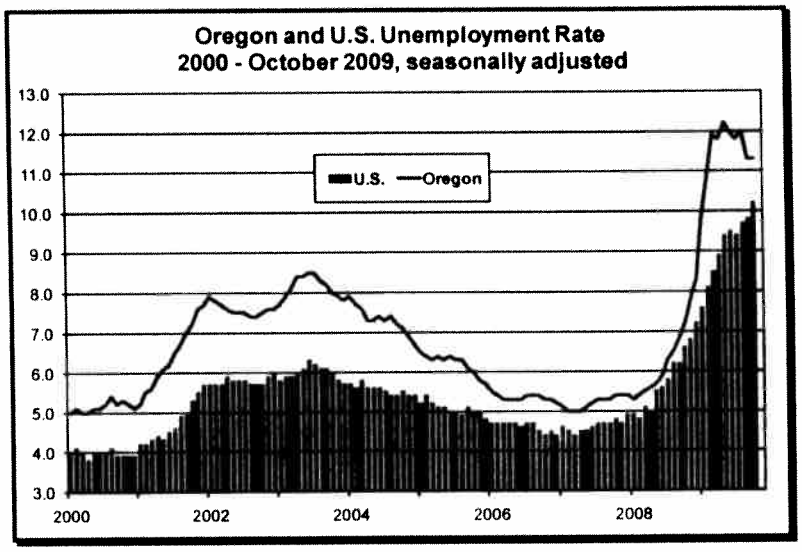
The Portland metro area's seasonally adjusted nonfarm payroll employment edged up by 400 jobs in October, following a loss of 2,300 (as revised) in September.

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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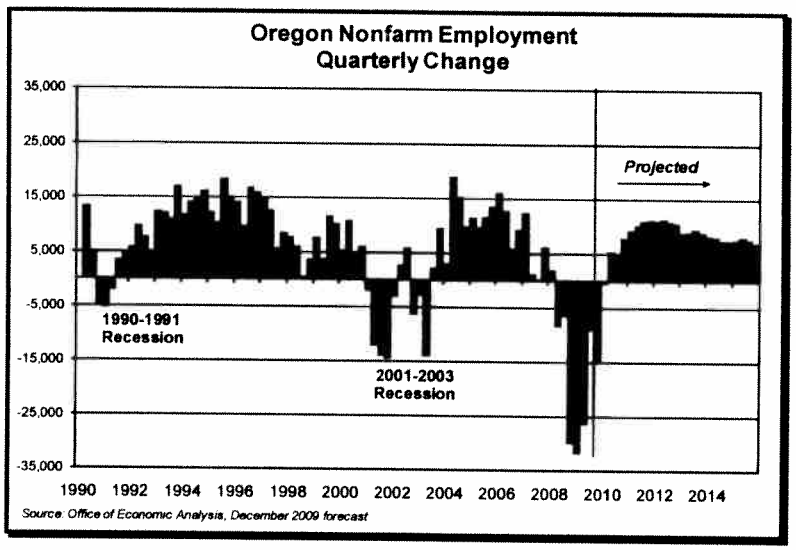
Oregon's seasonally adjusted nonfarm payroll employment dropped by 1,900 jobs in October, following a loss of 6,000 (as revised) in September.

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.

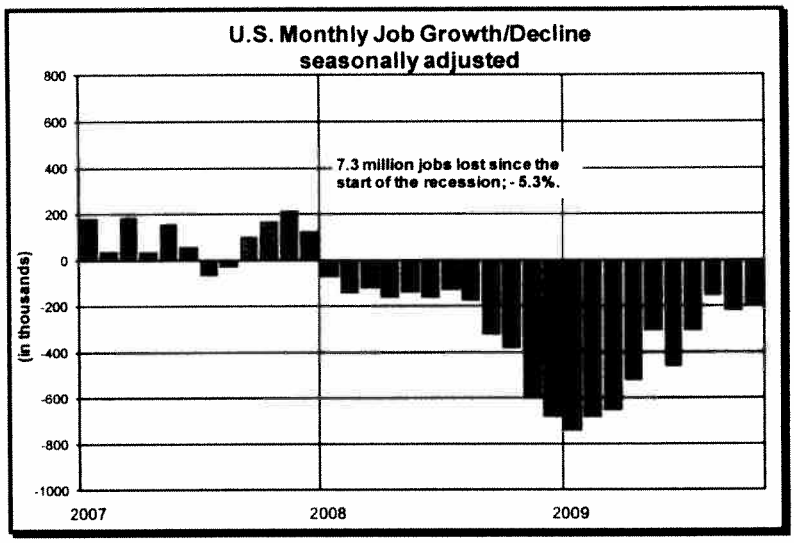
We'll start 2010 with mild job losses followed by modest growth in the second quarter through the end of the year. We won't see significant growth (above 2%) until 2011. It may be as late as 2013 before we return to pre-recession employment levels.

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)

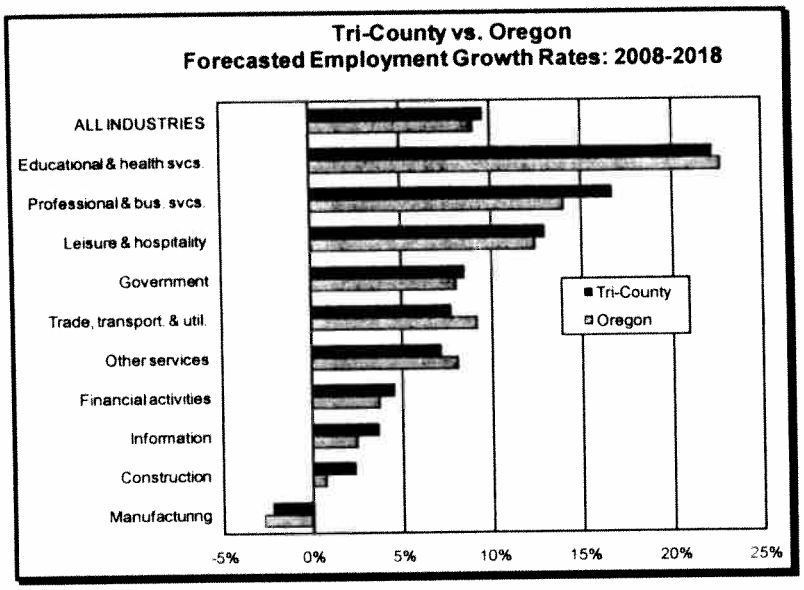
Summary

- 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.

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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)

December 2007

Attachment 9

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

October 2008

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

August 2009

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

Attachment 10

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

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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

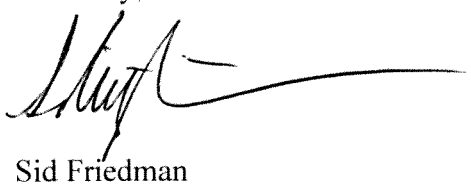
considered advantageous, not disadvantageous. We continue to believe that is true and we stand by our previous testimony.

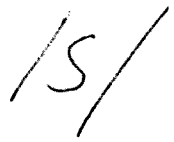
5. Conclusion

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

Attachment 1

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.

Attachment 1

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.

Attachment 1

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

Attachment 1

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.

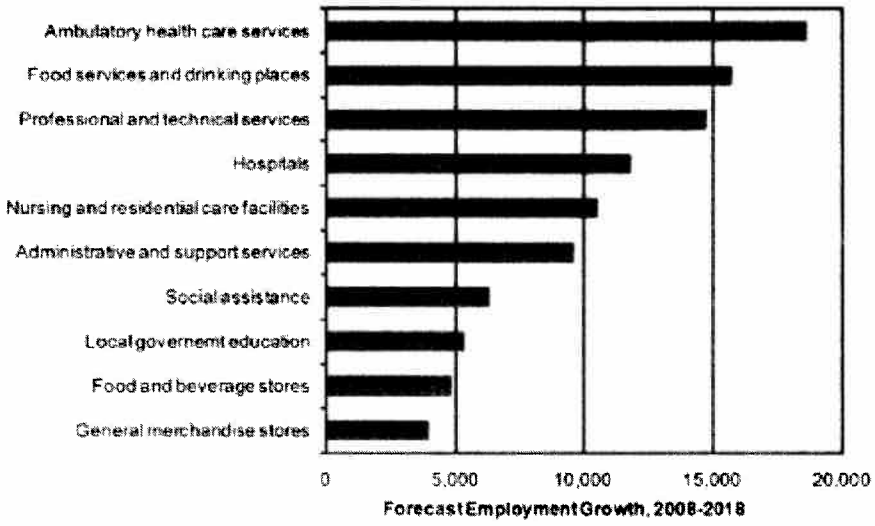
As mentioned above, the federal government is expected to lose jobs as the Umatilla Army Depot chemical incinerator closes and because of falling demand for postal services.

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

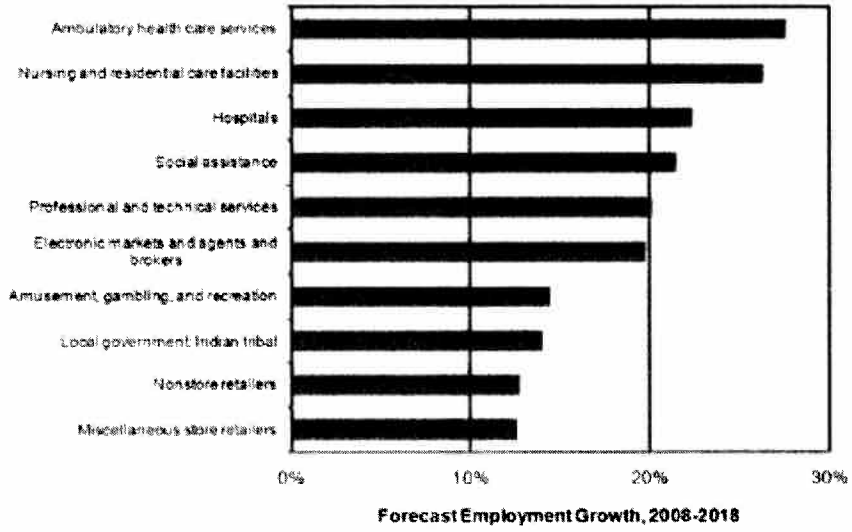
Attachment 1

Oregon's Industries Adding Most Jobs, 2008-2018



Graph 2

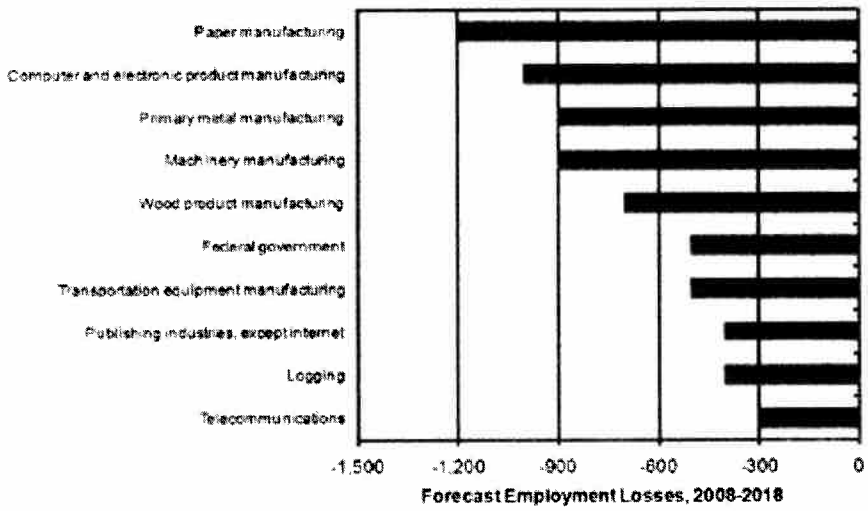
Oregon's Fastest Growing Industries, 2008-2018



Attachment 1

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.

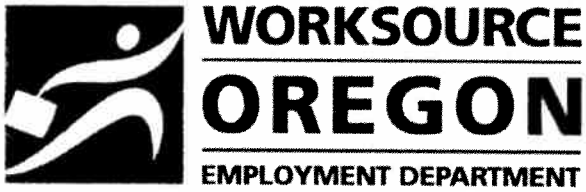
Attachment 1

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%

Attachment 2



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

Attachment 2

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%

Attachment 3

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

Attachment 4

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.

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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