



IMPROVING OUR COMMUNITY

COLUMBIA GATEWAY URBAN RENEWAL AGENCY

CITY OF THE DALLES

AGENDA

COLUMBIA GATEWAY URBAN RENEWAL AGENCY BOARD

Meeting Conducted in a Room in Compliance with ADA Standards

Tuesday, October 15, 2019

5:30 p.m.

City Hall Council Chambers
313 Court Street
The Dalles, Oregon

- I. CALL TO ORDER
- II. ROLL CALL
- III. PLEDGE OF ALLEGIANCE
- IV. APPROVAL OF AGENDA
- V. APPROVAL OF MINUTES – September 11, 2019 and September 17, 2019
- VI. PUBLIC COMMENT
- VII. ACTION ITEM
 - A. A Community Vision for The Dalles Downtown
- VIII. INFORMATION ITEM
 - A. Economic Opportunities Analysis and Action Plan
- IX. STAFF COMMENTS
 - Next Regular Meeting Date – November 19, 2019
- X. BOARD MEMBERS COMMENTS OR QUESTIONS
- XI. ADJOURNMENT

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IMPROVING OUR COMMUNITY

COLUMBIA GATEWAY URBAN RENEWAL AGENCY
CITY OF THE DALLES

SPECIAL MEETING MINUTES
COLUMBIA GATEWAY URBAN RENEWAL AGENCY BOARD

Meeting Conducted in a Room in Compliance with ADA Standards

Wednesday, September 11, 2019

5:30 p.m.

CALL TO ORDER

Chair Grossman called the meeting to order at 5:30 p.m.

ROLL CALL

Present: Scott Baker, Staci Coburn, Bob Delaney, John Fredrick, Gary Grossman, Steve Kramer, Darcy Long-Curtiss, Tim McGlothlin, and Linda Miller

Absent:

Staff Present: Urban Renewal Manager Steve Harris, City Attorney Gene Parker

PLEDGE OF ALLEGIANCE

Chair Grossman led the Pledge of Allegiance.

APPROVAL OF AGENDA

It was moved by Fredrick and seconded by Miller to approve the agenda as written. The motion passed 9/0; Baker, Coburn, Delaney, Fredrick, Grossman, Kramer, Long-Curtiss, McGlothlin and Miller in favor, none opposed.

PUBLIC COMMENT

Chuck Gomez, 221 E. Second Street, The Dalles

Mr. Gomez stated his concerns regarding the Recreation Building. Barricades placed around the Recreation are impeding his ability to do business at the Granada Theatre and Spotlight Café. He urged the Board to consider the plight of both businesses.

Mike Courtney, 2437 E. 18th Street, The Dalles

Mr. Courtney shared his concerns about rushing into a contract. He asked if qualifications beyond a license were checked; two bidders had residential licenses, one had a commercial license. A residential license may not qualify. He also asked if references and experience were reviewed.

Courtney stated the City is requiring liability insurance of only \$1 million; current Oregon Tort Claim limit would hold the City liable for up to \$1.495 million. He strongly suggested a minimum of \$1.5 in liability coverage.

Courtney stated the City had not required a Performance and Payment Bond.

ACTION ITEMS

Director Harris presented the staff report. City Attorney Parker stated a Declaration of Emergency by the Agency would exempt the contract from the normal bidding process. A Performance and Payment Bond could be required, or waived; the concern was the amount of time required to obtain the bond. The City's primary concern was that the insurance agency and inspectors stressed the importance of addressing this as soon as possible.

Board discussion included:

- Insurance agency requirements for choice of contractor
- Replacement value coverage (based on value of building at time of incident)
- Funds available to cover demolition
- Increased liability coverage
- Experience is vital for controlled demolition
- Specific Scope of Work
- The necessity to act quickly
- Full demolition may be necessary, rather than a partial demolition
- How much taxpayer money will continue to be spent

Board Member Long-Curtiss moved that the Urban Renewal Agency Board declare an emergency exists due to damage to a portion of the roof of the Recreation Building which is in imminent danger of collapse, and that the Board authorize Staff to take appropriate action to select a contractor with experience in these demolitions, require a \$2 million liability bond, and a performance bond. Board Member Miller seconded the motion. The motion passed 7/2; Baker, Coburn, Delaney, Grossman, Long-Curtiss, McGlothlin and Miller in favor, Fredrick and Kramer opposed.

STAFF COMMENTS

Director Harris will contact contractors. Staff will coordinate with Public Works and Mr. Gomez regarding the safety barriers.

Harris stated neighboring property owners will be notified before demolition begins.

BOARD MEMBERS COMMENTS OR QUESTIONS

There were none.

ADJOURNMENT

Chair Grossman adjourned the meeting at 6:06 p.m.

Respectfully Submitted
Paula Webb, Community Development Secretary

Gary Grossman, Chair



IMPROVING OUR COMMUNITY

COLUMBIA GATEWAY URBAN RENEWAL AGENCY
CITY OF THE DALLES

MINUTES

COLUMBIA GATEWAY URBAN RENEWAL AGENCY BOARD

Meeting Conducted in a Room in Compliance with ADA Standards

Wednesday, September 17, 2019

5:30 p.m.

CALL TO ORDER

Chair Grossman called the meeting to order at 5:30 p.m.

ROLL CALL

Present: Scott Baker, Staci Coburn, Bob Delaney, John Fredrick, Gary Grossman, Steve Kramer, Tim McGlothlin, and Linda Miller

Absent: Darcy Long-Curtiss

Staff Present: Urban Renewal Manager Steve Harris

PLEDGE OF ALLEGIANCE

Chair Grossman led the Pledge of Allegiance.

APPROVAL OF AGENDA

It was moved by Kramer and seconded by Fredrick to approve the agenda as written. The motion passed 8/0; Baker, Coburn, Delaney, Fredrick, Grossman, Kramer, McGlothlin and Miller in favor, none opposed, Long-Curtiss absent.

APPROVAL OF MINUTES

It was moved by Fredrick and seconded by Coburn to approve the minutes of August 20, 2019, as written. The motion passed 8/0; Baker, Coburn, Delaney, Fredrick, Grossman, Kramer, McGlothlin and Miller in favor, none opposed, Long-Curtiss absent.

PUBLIC COMMENT

There was none.

ACTION ITEMS

Authorization to Publish Request for Proposals – Tony's Building Property

Director Harris presented the staff report. Harris then provided clarification on the evaluation process.

Board Member Coburn suggested the addition of the word “qualified” to prevent the assumption that if the first bidder was refused, the second bidder would automatically receive the contract.

Board Member Fredrick stated, “I think we need to table this. I question the effectiveness of Urban Renewal, and I don’t think any more action or projects should be taken on. We need to come up with an exit plan to exit out of the Urban Renewal Agency.”

It was moved by Kramer and seconded by McGlothlin to accept the RFP and direct staff to publish.

Vice Chair Baker suggested adding, “include changes as discussed.”

The motion passed 7/1; Baker, Coburn, Delaney, Grossman, Kramer, McGlothlin and Miller in favor, Fredrick opposed, Long-Curtiss absent.

DISCUSSION ITEM

Recreation Building Status Update

Director Harris provided an update on the Recreation Building. He had been in contact with two contractors and received references. One contractor suggested using the alley as access for the demolition. Work would start in approximately two weeks, with two to three weeks for completion.

Harris said City Attorney Parker had drafted the agreement, scope of work, and performance bond.

In response to Board inquiries, Harris replied:

- Very little lead paint was found. Asbestos was found in the basement tiles; the basement will be secured during demolition.
- The scope of work would require a certified abatement contractor.
- Upon completion, the building will be secured and weatherized.
- The structural engineer will be on site periodically to inspect materials.
- Todd Carpenter and Carla McQuade remain interested. An amendment to the DDA will be required.
- Carpenter and The Dalles Main Street received a grant from Oregon Main Street. A portion of the grant was for demolition. Carpenter was advised to contact the grantor regarding the building status.

Board Member Miller extended her thanks to the parties responsible for relocating the barriers near the Granada Theatre and Starlight Café.

Board Member Fredrick asked what the exact plan was. Would the building be taken down to ground level or would the basement be removed? Harris replied engineering said the basement was fine. At this time, it’s a controlled demolition to remove the roof portion and front wall.

Fredrick then asked what the plan was for the property when the demolition was complete. Was there still interest by the current occupant, or would the Agency retain the building. He then asked why the entire building would not be demolished.

Harris replied there was no damage to the basement. The plan is based on the preference of the Board; the Agency has title to the property.

Board consensus was to move forward with the DDA. At this time, there was no indication from Mr. Carpenter or Ms. McQuade that they would not proceed. At that point, the Board would make a decision.

STAFF COMMENTS

Director Harris said he hoped to return next month with a decision from Mr. Carpenter and Ms. McQuade. He hoped also that demolition would be underway.

Consultants involved in the Downtown Visioning exercise will return in October to present their report.

Sunshine Mill contacted Staff to request restructuring or considerations on their loan. Director Harris will meet with Finance Director Wilson to get current information on the loan. Chair Grossman stated Sunshine Mill was preparing to pay off their loan; they received pre-approval for a commercial loan.

An Architectural and Engineering Grant application was submitted by the new owners of the American Legion building [Lindsey and Thomas Giamei].

BOARD MEMBERS COMMENTS OR QUESTIONS

There were none.

ADJOURNMENT

Chair Grossman adjourned the meeting at 5:56 p.m.

Respectfully Submitted
Paula Webb, Community Development Secretary

Gary Grossman, Chair

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IMPROVING OUR COMMUNITY

COLUMBIA GATEWAY URBAN RENEWAL AGENCY
CITY OF THE DALLES

AGENDA STAFF REPORT
AGENDA LOCATION: VII. A.

DATE: October 15, 2019

TO: Chair and Members of the Urban Renewal Agency Board

FROM: Steven Harris, AICP
Urban Renewal Manager

ISSUE: A Community Vision for The Dalles Downtown

BACKGROUND

Attached is the October 14, 2019 City Council agenda report on the downtown visioning exercise. The material summarizes the public process, presents the draft Vision Statements and includes a power point presentation. As noted in report's "Next Steps" section, the City Council and Agency are requested to prioritize the draft Vision Statements to assist in preparing future implementation measures.

STAFF RECOMMENDATIONS

1. **Staff recommendation:** *Move to accept the Downtown Vision Statements and direct staff to return to the City Council and Urban Renewal Agency with a strategic plan, including action measures, to implement the Downtown Vision Statements.*
2. Decline to accept the Downtown Vision Statements and provide staff with direction as appropriate.

Attachments

City Council Agenda Report w/ Attachments (dated October 14, 2019)

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AGENDA STAFF REPORT

AGENDA LOCATION: Action Item #11-A

MEETING DATE: October 14, 2019

TO: Honorable Mayor and City Council

FROM: Steven Harris, AICP
Community Development Director

ISSUE: A Community Vision for The Dalles Downtown

BACKGROUND: In 2018 the Community Development Department (CDD) applied for and was awarded a state Transportation and Growth Management (TGM) grant to undertake a visioning exercise for the downtown area. The TGM grant program is a joint program of the Oregon Department of Transportation (ODOT) and Department of Land Conservation and Development (DLCD). The grant funds were sourced from the TGM Education and Outreach Services Program.

As stated in the grant application letter,

“The visioning program will consist of public/stakeholder workshops and a memorandum recommending the next steps in preparing a vision statement and a strategic plan. The vision statement and strategic plan will address the downtown’s emerging land use patterns; improving downtown pedestrian/bicyclist mobility; and planning for downtown transit service connections to local and regional destinations.”

The TGM Education and Outreach Services Program has limited grant funding capacity, therefore the work completed under this program should be considered as the first step in developing a vision and strategic plan for the downtown. The purpose of the project, as described in the Statement of Work, “is to help the City of The Dalles and its citizens lay the groundwork for a subsequent effort to develop a vision and strategic plan for the future of the downtown area. (The) Project will explore the roles of land uses, particularly housing, and transportation as components of the vision and make recommendations for the subsequent effort.”

Under the TGM grant program guidelines, upon completion of the Statement of Work, ODOT staff prepared and circulated the consultant RFP (Request for Proposals), and selected the consultant firm. The lead consultant for this work effort is the planning firm Cogito supported by Cameron McCarthy, a landscape architecture and planning firm. (Cameron McCarthy recently completed the NWC Parks and Recreation District Master Plan.)

Public Engagement Process

A successful planning or visioning process is dependent upon a robust and inclusive public engagement process. The public process employed in this visioning effort consisted of small group downtown stakeholder discussions, a larger public meeting and a presentation before the Urban Renewal Agency Board. Individuals representing five identified stakeholder groups were invited to participate in discussions on March 19 and 20, 2019. The participants were divided into the following interest groups: Arts & Entertainment, Development, Property Owners, Retailers & Business Owners and Services. A total of forty-seven individuals participated in the meetings. A facilitated discussion among the groups was held to address the following:

Considering current and future activities and users of downtown:

- What's working with downtown now?
- What would you like to change about downtown?

Participants were provided a series of images of The Dalles and asked to consider the following questions:

- What are you proud of?
- What brings you home?

The attached "A Community Vision for Downtown The Dalles – Stakeholder Meeting Summary" provides background information on the stakeholder meetings, including the responses to the above questions.

Following the stakeholder discussions a public meeting was held on May 6, 2019 to gather more opinions on downtown. Approximately sixty individuals attended the meeting. Participants were encouraged to share information on new businesses and activities in the downtown, learn how other communities are reinvesting in their downtowns and provide comments on priorities for the downtown. Participants were also asked to prioritize elements/attributes of successful downtowns that were generated from the stakeholder meetings. The elements/attributes were categorized as follows: Active Streetscapes, Public Gathering Spaces, Critical Mass of Businesses, Retail & Dining Options, Housing Options, Community, Arts & Entertainment, and Landmarks & Character Architecture. A meeting summary and responses to the ranking exercise is attached.

The results of the stakeholder and public meetings were presented to the Urban Renewal Agency Board on June 18, 2019, including rankings of the successful downtown elements/attributes noted above. The highest ranked response of each is as follows:

- Active Streetscape - Vegetation
- Public Gathering Spaces - Socializing
- Critical Mass of Businesses - Downtown Experience
- Retail & Dining Options - Outdoor Seating
- Housing Options - Strong Connections
- Community - Welcoming
- Arts & Entertainment - Visitors & Residents
- Landmarks & Character Architecture - Re-use & Redevelop

Process Outcomes

A final presentation document has been prepared that summarizes the stakeholder and public meetings, and comments received from the Agency Board at their June 18, 2019 meeting. Based on input received from the meetings, the following Vision Statements were drafted taking into consideration the identified downtown elements/attributes:

- *Built from a history of trade and rural hard work, The Dalles Downtown embraces the past and welcomes a future of new people and ideas.*
- *Residents and visitors appreciate the scenic vistas, historic buildings, growing retail establishments, vibrant community events, and expanding recreation and performing arts opportunities.*
- *In the future, shaded sidewalks with greenery, outside gathering spaces for family events and performances, and public art will enhance the downtown experience.*
- *A place to live affordability, buy food, walk and bike safely, use a wheelchair, access transit, and breathe clean air are essentials for the growing community of The Dalles.*

In addition to the draft Vision Statements, comments received from the public and Agency Board Members were used to generate two exhibits of the downtown area. The first is a graphic that illustrates different “improvement areas” within the downtown. Note that the “areas” are conceptual and will not have a regulatory component. The four areas are identified as follows:

Landmark

The Landmark Area is characterized by historic, landmark structures mixed with residential, commercial and professional services.

Industry

The Industry Area features businesses focused on production of goods and products.

Services

The Services Area features businesses focused on culture and hospitality. This includes restaurants, amenities and hotels.

Makers

The Makers Area features businesses focused on crafting products, goods and services. This includes small businesses like breweries, wineries and arts.

The second graphic depicts downtown “opportunity sites” and properties that have the potential to develop upper story residential units. The identified opportunity sites include both public and privately-owned properties that can be classified as either vacant or underutilized. An underutilized property could be one where a structure and improvements have minimal value compared to the land value, where the structure and improvements occupy minimal site area, or other economic factors. The opportunity sites also include properties that are currently being used as surface parking (both public and private) that may have reuse potential. The upper story residential opportunity sites include buildings that have either had residential uses (including hotels) in the past, or properties that are currently developed or underutilized that could be developed as housing. Further study of the properties would be necessary to determine the economic feasibility of specific development proposals.

Next Steps

The next step in the process is for the City Council and Agency to review the draft Vision Statements, modify as appropriate and move to accept. Following acceptance of the Vision Statements, staff will begin work on a strategic plan that includes implementation measures for each of the Statements. Such measures may include collaboration with community partners to further market the downtown, improve downtown transit access and connectivity features, infrastructure expenditures, landscaping, identifying options to create public gathering spaces, etc.

To assist in the the drafting of the recommended implementation measures it would be beneficial for the City Council to prioritize the Vision Statements. The Council’s preferences will be forwarded to the Urban Renewal Agency Board for concurrence.

BUDGET IMPLICATIONS: The Downtown Vision Exercise was funded by an ODOT grant through the TGM – Education and Public Outreach Program. City financial participation was limited to staffing resources and miscellaneous expenses for the stakeholder and public meetings. \$25,000 has been included in the Columbia Gateway Urban Renewal Agency FY2019-20 budget for a follow up implementation plan.

COUNCIL ALTERNATIVES:

1. **Staff recommendation:** *Move to accept the Downtown Vision Statements and direct staff to return to the City Council and Urban Renewal Agency with a strategic plan, including action measures, to implement the Downtown Vision Statements.*
2. Decline to accept the Downtown Vision Statements and provide staff with direction as appropriate.



A Community Vision for Downtown The Dalles

STAKEHOLDER MEETING SUMMARY

March 19 & 20, 2019, Civic Auditorium, Fireside Room, 323 E. 4th St

Introduction

The City of The Dalles is working with residents, organizations, and businesses to develop a vision and goals for the future of the downtown area. Funded by the State of Oregon's Transportation and Growth Management Program, the project explores:

1. What works now, what should change, who downtown serves, and how will it look and feel in the future.
2. How land is used downtown and how people move around.
3. Ways that communities hold on to what they value and successfully manage change.
4. Future public improvements for the downtown area.

Project Process

Incorporating a wide range of views into the vision and goals will result in a broadly understood and supported plan for the future. The first step in the process occurred on March 19 and 20 of 2019 when the project hosted initial conversations with organizations, businesses, and institutions that have a stake in the future of downtown. The goal was to gather input on process and content for a large public conversation on the future of downtown.

The next step will be to host an event for the public in the spring of 2019 to gather opinions on downtown. The project will recruit a diverse set of residents, organizations and businesses to participate in the event and provide activities and materials that are accessible to a range of ages, abilities and interests.

*Project Contact: Steve Harris, City of The Dalles Community Development Director
313 Court Street | The Dalles, OR 97058, 541.296.5481 x1151, www.thedalles.com*



Project Area



Stakeholder Conversations

A diversity of individuals, groups, and businesses gathered to share their views of downtown and provide content for a larger conversation planned in the future.

Tuesday, March 19 – Civic Auditorium, Fireside Room, 323 E. 4th St

2:00-3:00 PM - Retailers/business owners: Martin Boyden, Sherry Dufault, Brad Ellis, Steve Lite, Lisa Farquharson, Luise Langheinrich, Nan Wimmers, Kerri Weed, Dale McCabe

3:30-4:30 PM - Arts & entertainment: David and Kristen Benko, Chuck Gomez, Bunny Henningsen, Roger Kline, Steve Lawrence, Siobhan O'Halloran, Scott Stephenson, Dan Williams, Jeff Wavrunek, Terry Chance, Al Hare

5:30-7 PM – Urban Renewal Agency Board at City Hall: Scott Baker, Bob Delaney, John Fredrick, Gary Grossman, Steve Kramer, Dracy Long-Curtiss, Tim McGlothlin and Linda Miller

Wednesday, March 20 – Civic Auditorium, Fireside Room, 323 E. 4th St

9-10 AM - Property owners: Todd Carpenter, Steve Day, Matt Herriges, Philip Mascher, Bill Matthew, Barbara Pizzola, Scott Edelman, Carla McQuade, Dawn Hert

10:30-11:30 AM – Services: Lt. Raymond Morse, Celeste Hill-Thomas, Rick Leibowitz, Joel Madsen, Dan Schwanz, Sharon Thornberry, Leticia Valle, Kelly Houser-Glover, Kathy Fitzpatrick, Matthew Klebes

12-1 PM – Development: Travis Dillard, Mary Hanlon, Brian Lauterbach, Heidi McBride, Dennis Morgan, Angie Brewer, Doug Leash, Josh Chandler, Nate Stice

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Introductory Presentation

Steve Harris, Community Development Director for City of The Dalles, welcomed participants and shared the project and meeting goals. Colin McArthur of Cameron McCarthy Landscape Architecture and Planning presented various concepts used in different downtowns in Oregon, including the components of a healthy and vibrant downtown. Colin grew up twenty miles outside of the Dalles, and he shared insights as both a former area resident and an urban design professional. See below for summary images, and Appendix A for the full presentation. Julie Fischer then posed the following questions and facilitated a conversation among participants:

Key Questions for Participants

Considering current and future activities and users of downtown:

What's working with downtown now?

What would you like to change about downtown?

The Big Picture Identity of The Dalles

Participants perused a series of images of The Dalles and considered the following questions:

What are you proud of? What brings you home?

Elements of vibrant and successful downtowns



- Active streetscapes
- Public gathering spaces
- Critical mass of businesses
- Mixed uses
- Retail and dining options
- Housing options
- Community and social organizations
- Arts and entertainment
- Landmarks
- Character architecture





Active streetscapes



Public gathering spaces



Critical mass of businesses



Mixed uses



Retail and dining options



Housing options



Community and social organizations



Arts and entertainment



Landmarks



Character architecture

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Stakeholder Conversation Themes

These notes are a compilation of comments from 6 group conversations over two days. Italic means comments were heard in 2 groups, bold is 3 groups, and red is four or more groups. For a summary of flip chart notes, see Appendix B.

Transportation

Safety

- ***Slow down vehicle speeds. Consider traffic calming measures, such as bulb-outs, ways to buffer pedestrians from vehicles***
- *Improve environment for bicycles, bike lanes.* Some recommend yes for 1st and 4th, no to 2nd and 3rd. Others want bike lanes for all
- *Increase lighting for pedestrians*
- Increase and improve pedestrian crosswalks
- Improve access for people who are disabled, young, and transportation-challenged (people who don't have access to a car)

Infrastructure

- Maintain current traffic flow, it is an asset
- Consider 2-way traffic?
- Downtown is not just 2nd and 3rd, also consider 1st and 4th
- 1st Street has an opportunity to develop setbacks – an asset, add trees!
- 4th Street has opportunities for redevelopment, example: The Foley
- Make it more people-oriented and accessible. Private vehicle access only is a divider. Youth, disabled people, and residents without a car. Increase transit, walkability.
- Cover up the sewer ponds that are viewed from 1st St.

Parking

- *Perception that parking is a challenge. Address through public education.*
- On-street parking is an asset
- How about angled parking?

Public space (streets, sidewalks)

- ***Increase the green: healthy, large trees, greenery, shade***
- ***Beautification and art.*** More murals, etc.
- ***Create more outside public space*** – fountain? Town square? Shade and seating? Recognize that heat is a major factor in summer and plan for it
- *Increase walking downtown: create a reason to walk, interesting views, desire to explore, shelter from sun and ice*
- *Improve cleanliness: provide garbage cans?*
- Link up public parks: downtown to Lewis & Clark Park. Increase access to the river

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- Consider architectural review for building facades and awnings (McMinnville)

Downtown Properties

- **Increase housing downtown!** More people living, gathering, eyes on the street
 - o Housing over retail. Code issues are challenging with historic buildings – expensive to bring second story buildings up to residential code, any way to deal with this?
 - o Affordable rents, more rentals
 - o Senior housing needed, low to mid-income (apartments, condos, townhouses)
- **Historic structures are an amazing asset, but challenging to repurpose, redevelop.** The downtown has “great bones.”
- Fill the void – increase retail activity by dividing up large internal spaces that are difficult to lease
- Support coordination between property owners, work together on redevelopment
- Increase office space that is ADA accessible
- Increase “slider windows” that connect sidewalks to interior of buildings – improve pedestrian experience

Business Climate

- **Currently, there is a strong business base and commercial activity continues to grow**
- Serves rural communities up to 80 miles away, this is a “working downtown”
- Exciting new projects, creative investment
- Focus on “traded-sector,” manufacturing and tourism
- **Concern about air quality, AmeriTies pollution,** must solve the problem, negative impact on events and overall image of The Dalles
- Some business rely on I-84 traffic (Freebridge = 70%+), others rely on residents
- How can we get more people off the highway and into downtown?
- **Retail, various views:**
 - o Increase retail (clothing, shoes, outdoor), restaurants
 - o Unrealistic to increase retail such as clothes, shoes, focus instead on restaurants
 - o Focus on quality, handmade products, things you can’t buy at Walmart or on Amazon
 - o The heartbeat of retail Fri-Sun is Safeway, Fred Meyer. That is where local people are interacting. How do you entice people downtown? Entertainment activities?
- **Grocery store!** Existing corner stores have unhealthy fast food
- Increase opportunities for “micro-businesses” and locally owned businesses
- **Develop “experience-related” businesses: outdoors, wine. Focus on youth, urban, figure out how to lengthen visitor stay**
- Increase businesses that are open on the weekends when people can shop
- Provide an RV Park – this is the most common request, according to the Chamber
- Services for families in need are located downtown. A food pantry is planned for the west end. Many pantry clients are employed at retail establishments downtown. The Housing Authority, Salvation Army are important service providers downtown. Low-income housing



(section 8) is located downtown, and more affordable rentals are needed, with access to a grocery store.

- Business licensing: benefit would be to manage cannabis sales, concerns about limitations to small businesses
- Coordinate with organizations who are already working on downtown: Main Street, Chamber, Blue Zones.

Business District Idea

- Arts and entertainment district
- Manufacturing and industry district: focus on authentic, small-scale manufacturing
- "Makers" district
- "Merchants Landing" district
- Music district
- How about the value of "mixed-use", don't want to lose that opportunity
- Concern expressed about being too prescriptive. Support for incentives and allowing districts to evolve over time.
- Compared to Portland, our "districts" would be really small, how would that work?
- Consider each street a district, and develop a distinct identity for each, through placemaking, lighting, etc.

Social Environment

The arrival of "creatives" can result in gentrification, how do we avoid displacement? Key is property ownership?

What is growing: Young families, music, art, brews

Merge the old and new. Bridge the cultural divide, the gap between the establishment and new energy. Find a balance between tourist town/working town. Don't forget the farmers, people who build and make things, Native American history. Multicultural rodeo?

Create a "welcome" culture: Native American, Latino. Provide more multicultural events, translation

Increase family activities: splash park? Ice skating rink? Kid space (especially indoor)

Create a "downtown experience", art, music, history, nostalgia. Foster an environment where it is fun to gather, bring families, welcome youth, eat ice cream, wander store to store, enjoy arts and crafts, explore nightlife, feel vibrant activity.

Recognize the generational trauma of the region:

- Dam and loss of Celilo Falls
- Displacement of Native American housing and culture
- Aluminum plant closing



- Death penalties
- School closures and merging
- Loss of China town
- Rajneeshpuram
- AmeriTies air pollution
- Worthiness

Events

- An opportunity to bring everyone together
- Increase collaboration between agencies, organizations, and businesses
- *More family-oriented events and festivals*

Messaging

- "Destination All The Time" (not just event-driven activity)
- "Eastern Gateway" – backcountry experiences
- "East/West Gateway" – how about an arch sign in downtown?
- "The Hub"
- "The Makers"
- 300 Days of Sunshine
- Small town
- History
- Opportunity
- Local materials
- Relate to the region
- Keep unique identity, not cookie cutter





A Community Vision for Downtown The Dalles

Introduction

In collaboration with residents, organizations, and businesses, the City of The Dalles is developing a vision and goals for the future of the downtown area. Funded by the State of Oregon's Transportation and Growth Management Program, the project explores:

1. What works now, what should change, who downtown serves, and how will it look and feel in the future.
2. How land is used downtown and how people move around.
3. Ways that communities hold on to what they value and successfully manage change.
4. Future public improvements for the downtown area.



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QUESTIONNAIRE FOR THE URBAN RENEWAL COMMITTEE

Elements of Vibrant and Successful Downtowns

- **Choose your top 3 priorities.** Check the 3 boxes you believe are most important and achievable for the success of The Dalles downtown. The **topics** are not listed in any particular order.
- **Within each topic,** review the bullets and circle your priorities, put an X on items you don't agree with, add new bullets if needed. The bullets below are in the order of priority based on approximately 50 questionnaires completed by the public at the May meeting.

☐ **Active Streetscapes (Circle your top 2)**

- **Vegetation (trees, planters, hanging baskets)**
- Furnishings (seating, shade awnings, waste baskets, wayfinding signs)
- Public art (mural, sculpture)
- Infrastructure to promote safety and access (transit, wide sidewalks, crosswalks, bicycle facilities, bulb-outs)
- Street lighting
- Events

☐ **Public Gathering Spaces (Circle your top 2)**

- **Socializing (shade, seating, food/drink)**
- Relaxation (pocket garden)
- Recreation and play (fountain, splash pad, lawn)
- Infrastructure for events (stage, plaza)
- Public art
- Picnicking (lawn, tables)

☐ **Critical Mass of Businesses (Circle your top 2)**

- **Creating an "downtown experience" for visitors and residents**
- Low vacancy rates
- Variety
- Robust hours of operation
- Good air quality
- Adequate parking

☐ **Retail and Dining Options (Circle your top choice)**

- **Grocery store**
- Outdoor seating
- Building façade
- Shade



☐ **Housing Options (Circle your top choice)**

- Strong connection to retail, open space, transit, sidewalks, bike routes
- Fits in with the character of historic downtown
- Affordability

☐ **Community (Circle your top choice)**

- Create a welcoming culture and environment
- Merge the old and new, bridge the gap between established residents and new community members
- Family friendly activities

☐ **Arts and Entertainment (Circle your top choice)**

- Attracts both area community and visitors
- Promote public art, creativity and artistic expression
- Builds on existing strengths, events and activities
- Signage/wayfinding

☐ **Landmarks & Character Architecture (Circle your top choice)**

- Re-use and redevelopment of historic structures
- Maintain streetscape edge/building facades
- Introduce or re-introduce landmarks (important sites, structures, or buildings) that fit existing character



Project Process

The first step in the process occurred on March 19 and 20 of 2019 when the project hosted initial conversations with organizations, businesses, and institutions that have a stake in the future of downtown. Next, the project hosted a public conversation on Monday, May 6 of 2019 to gather opinions on downtown. Approximately 60 participants gathered to share new projects happening downtown, learn about how other communities have navigated change, and weigh in on priorities for downtown The Dalles.

Public Meeting Details

May 6, 2019, 5:30-7:30 pm, Civic Auditorium, Fireside Room, 323 E. 4th St

The meeting began with participants sharing new projects happening downtown. Several property owners discussed upcoming development plans, from new retail opportunities to plans for housing.

Steve Harris, Community Development Director for City of The Dalles, welcomed participants and shared the project and meeting goals. Colin McArthur of Cameron McCarthy Landscape Architecture and Planning presented various concepts used in different downtowns in Oregon, including the components of a healthy and vibrant downtown. Colin grew up twenty miles outside of the Dalles, and he shared insights as both a former area resident and an urban design professional. Julie Fischer facilitated a conversation on key questions.

Before and after the meeting, participants reviewed images representing facets of The Dalles and downtown, and weighed in on what they felt best represented the town.

Questionnaire Comments

1. What's Working?

- Renovations/upgrades!!!!
- Rehab store fronts
- 2nd story living!!!!
- Dining!!!
- Historical Building!!/ Architecture!!
- Businesses/shops!!
- New businesses
- Lighting!!
- Buildings
- Outdoor seating!!!
- Businesses open late
- Activity/energy
- Investment
- Trees
- Accessible scale/walkable/bikeable!
- Good weather

*Project Contact: Steve Harris, City of The Dalles Community Development Director
313 Court Street | The Dalles, OR 97058, 541.296.5481 x1151, www.thedalles.com*



- More activities – paint nite, route 30
- Parks and bike path
- Events

2. What should change?

- Housing!!! – Missing Middle
- Groceries
- Public art/music!!
- Desirable Shopping!
- More restaurants and boutiques
- Places for farmers market and family activities
- Community Building
- Streetscape
- Desert friendly vegetation
- **Bump-outs-slow-down traffics!!!!**
- “we look like a 2nd hand, smoke/vape community”
- It seems old and dusty
- Communal spaces
- Retail license on tobacco
- Uniform Signage
- Bike lanes
- Street festivities
- **Slow down the traffic!!!!(enforcement)!**
- Reduce traffic
- Public plaza
- Bike safety!
- Increase Art
- Long term vision Follow-through
- Parking regulations
- Green spaces!
- Outdoor seating
- River access!!
- Getting people to work together
- Cohesive growth and change
- Keep new businesses alive, longevity is important
- Move admin offices out of downtown
- Waterfront business aspect, rehab dilapidated buildings
- More breweries



Public gathering spaces

- Outdoor movies/performances

Businesses

- Info about existing businesses
- Store fronts
- Good food
- Public restrooms

Community

- The identity/brand is an ongoing theme/challenge. “Not Hood River” is a terrible story

Arts & Entertainment

- Create events/film festival/music festival

Landmarks

- Trees
- Uniform Signage
- Too many sandwich boards
- Create a distinct sense of place with the building facades/awnings/signs



A Community Vision for The Dalles Downtown



Elements of vibrant and successful downtowns

A Community Vision for Downtown The Dalles



Project Goals

- What works now
- What should change
- Future public improvements



Downtown The Dalles Project Area

A Community Vision for Downtown The Dalles



April-May 2019 Public Outreach



Comments on Imagery



What Does The Dalles Mean to You?



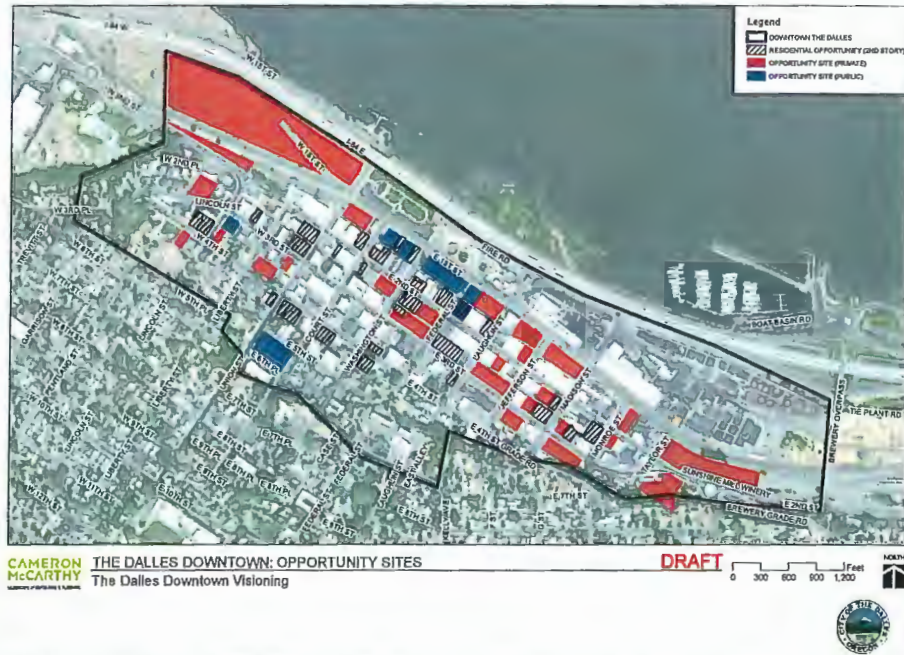
What Does Downtown Mean to You?



Improvement Areas



Opportunity Sites



Downtown Vision Statement

Built from a history of trade and rural hard work, The Dalles Downtown embraces the past and welcomes a future of new people and ideas.



Downtown Vision Statement

Residents and visitors appreciate the scenic vistas, historic buildings, growing retail establishments, vibrant community events, and expanding recreation and performing arts opportunities.



Downtown Vision Statement

In the future, shaded sidewalks with greenery, outside gathering spaces for family events and performances, and public art will enhance the downtown experience.



Downtown Vision Statement

A place to live affordably, buy food, walk and bike safely, use a wheelchair, access transit, and breathe clean air are essentials for the growing community of The Dalles.



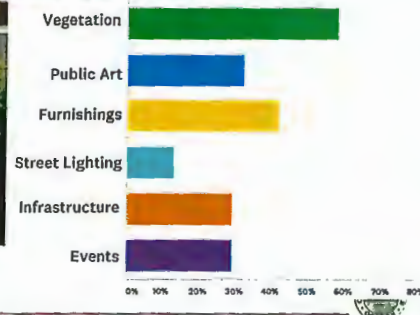
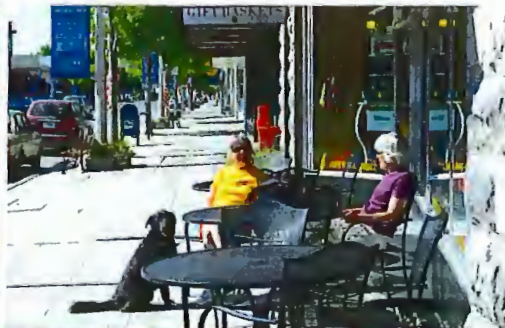
Elements of Vibrant & Successful Downtowns

- Active Streetscape
- Public Gathering Spaces
- Critical Mass of Businesses
- Retail & Dining Options
- Housing Options
- Community
- Arts & Entertainment
- Landmarks & Character Architecture

A Community Vision for Downtown The Dalles



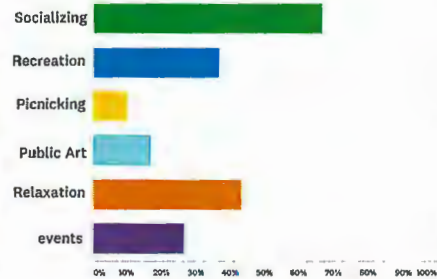
Active Streetscape



Note: % = Percent of total public survey responses

A Community Vision for Downtown The Dalles

Public Gathering Spaces



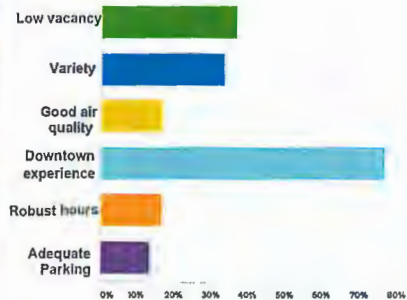
Note: % = Percent of total public survey responses



A Community Vision for Downtown The Dalles



Critical Mass of Businesses



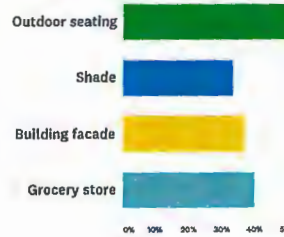
Note: % = Percent of total public survey responses



A Community Vision for Downtown The Dalles



Retail & Dining Options

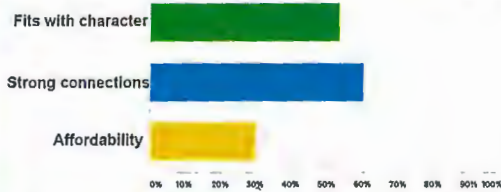


Note: % = Percent of total public survey responses

A Community Vision for Downtown The Dalles



Housing Options

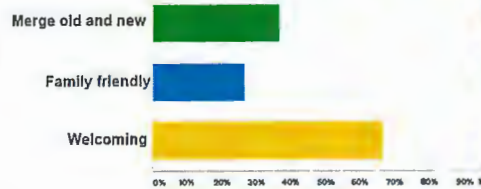


Note: % = Percent of total public survey responses

A Community Vision for Downtown The Dalles



Community

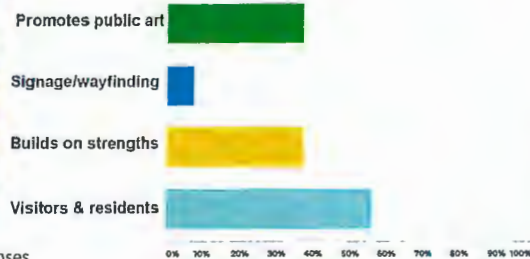


Note: % = Percent of total public survey responses

A Community Vision for Downtown The Dalles



Arts & Entertainment

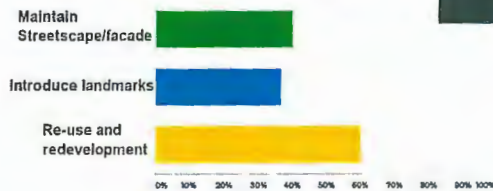


Note: % = Percent of total public survey responses

A Community Vision for Downtown The Dalles



Landmarks & Character Architecture



Note: % = Percent of total public survey responses

A Community Vision for Downtown The Dalles



Population and Housing Trends

Housing and Residential Land Needs Assessment (2017)

In the next 20 years, estimates show:

- 4000 people (200 people per year)
- 1,769 new housing units (90 per year)

FIGURE 6.3: SUMMARY OF FORECASTED FUTURE UNIT NEED (2036)

TOTAL HOUSING UNITS									
	Single Family Detached	Single Family Attached*	Multi-Family			Mobile Home	Boat, RV, other temp	Total Units	% of Units
			2-unit	3- or 4-plex	5+ Units MFH				
Totals:	1,112	50	101	99	228	178	0	1,769	100%
Percentage:	62.8%	2.8%	5.7%	5.6%	12.9%	10.1%	0.0%	100.0%	

Sources: PSU Population Research Center, Claritas Inc., Census, Johnson Economics



1

Economics

Economic Opportunity Analysis & Action Plan (2019)

- Approximately 3,327 jobs in next 20 years

Goal 2: Grow and Attract Talent

Objective 2.1 Provide Diverse Types of Housing

Objective 2.2 Prepare Youth for Economic Opportunity

Objective 2.3 Attract Talent

Goal 2: Create Place

Objective 2.1 Complete and Implement the Downtown Plan

Objective 3.2 Celebrate The Dalles

Objective 3.3 Support Local Retailers and Expand the Market

Objective 3.4 Promote the Gorge and Enhance Access to Outdoors

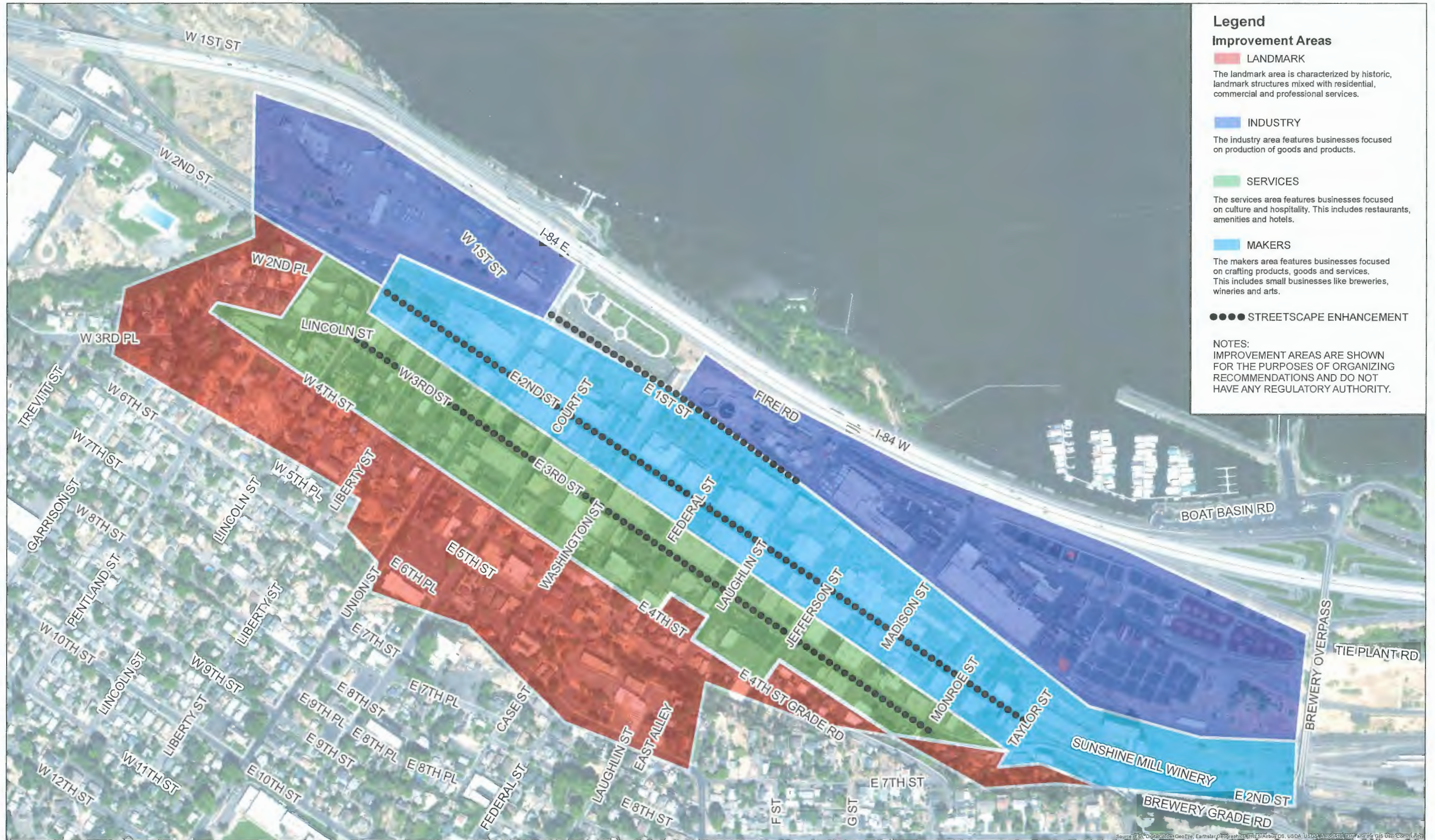
Note: These goals are in draft form





Legend

- DOWNTOWN THE DALLES
- RESIDENTIAL OPPORTUNITY (2ND STORY)
- OPPORTUNITY SITE (PRIVATE)
- OPPORTUNITY SITE (PUBLIC)



Legend

Improvement Areas

LANDMARK

The landmark area is characterized by historic, landmark structures mixed with residential, commercial and professional services.

INDUSTRY

The industry area features businesses focused on production of goods and products.

SERVICES

The services area features businesses focused on culture and hospitality. This includes restaurants, amenities and hotels.

MAKERS

The makers area features businesses focused on crafting products, goods and services. This includes small businesses like breweries, wineries and arts.

STREETSCAPE ENHANCEMENT

NOTES:

IMPROVEMENT AREAS ARE SHOWN FOR THE PURPOSES OF ORGANIZING RECOMMENDATIONS AND DO NOT HAVE ANY REGULATORY AUTHORITY.



IMPROVING OUR COMMUNITY

COLUMBIA GATEWAY URBAN RENEWAL AGENCY
CITY OF THE DALLES

AGENDA STAFF REPORT
AGENDA LOCATION: VIII. A.

DATE: October 15, 2019

TO: Chair and Members of the Urban Renewal Agency Board

FROM: Steven Harris, AICP
Urban Renewal Manager

ISSUE: Economic Opportunities Analysis and Action Plan

BACKGROUND

Attached is the September 23, 2019 City Council agenda report, Economic Opportunities Analysis (EOA) and Action Plan. The City Council accepted the EOA and deferred action on the Action Plan until such time as Phase 2 of the EOA is considered by the Council.

The attached Friends of the Columbia Gorge letter was presented to the Council at the meeting. City Council directed staff to prepare a formal response to the letter.

STAFF RECOMMENDATIONS

No action necessary. Information only.

Attachments

City Council Agenda Report w/ Attachments (dated September 23, 2019)
Friends of the Columbia Gorge letter (dated September 23, 2019)

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ECONOMIC OPPORTUNITIES ANALYSIS & ACTION PLAN

SEPTEMBER 2019



Prepared By

Bridge Economic Development

2406 NE 9th Avenue
Portland, Oregon 97212
503-540-8678
www.bridgeed.com

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EXECUTIVE SUMMARY

The City of The Dalles has developed an economic development strategy that incorporates two distinct elements. First is a long-term evaluation, through the first phase of an Economic Opportunity Analysis (EOA), of the city's 20-year projected employment growth and corresponding amount of land necessary to accommodate that growth. Second is a short-term 5-year action plan for immediate programs and projects that the city and its economic development partners can implement to grow the existing economic base. These are parallel but complimentary efforts derived from the same data, research and information provided in this document.

In preparing the EOA, the City decided to split the analysis into two phases to maximize grant opportunities and utilize local funds responsibly. The first phase of the analysis focuses on the forecasted employment growth opportunities and estimated amount of demand for new land. The second phase of the EOA will evaluate if there is adequate land supply to meet this anticipated growth and land demand, and whether an Urban Growth Boundary (UGB) expansion is necessary. In accordance with the Department of Land Conservation and Development (DLCD), only land within Oregon can be considered as part of the phase two supply evaluation. No Washington lands may be considered as part of the evaluation.

This first phase of the EOA was completed in accordance with the requirements of statewide planning Goal 9 and OAR 660-009-0015. The objective of an EOA is "to identify likely industrial and other economic development opportunities and corresponding employment land needs over the planning period of the next 20 years" through an analysis of national, state, regional and local trends and the establishment of community vision, goals and objectives.

Within this report, and according to OAR 660-009-0015, an EOA must include the following:

1. Review of National, State, Regional, County and Local Trends.
2. Identification of Required Site Types
3. Inventory of Industrial and Other Employment Lands (Forthcoming in Phase II)
4. Assessment of Community Economic Development Potential

The projection of employment growth and the resulting land demand over the next twenty years was developed based on economic and community trends, Oregon Employment Department employment projections, historical employment growth in The Dalles and the regional five-county economic development district (Mid-Columbia Economic Development District region) of which The Dalles is a part as well as community vision and goals.

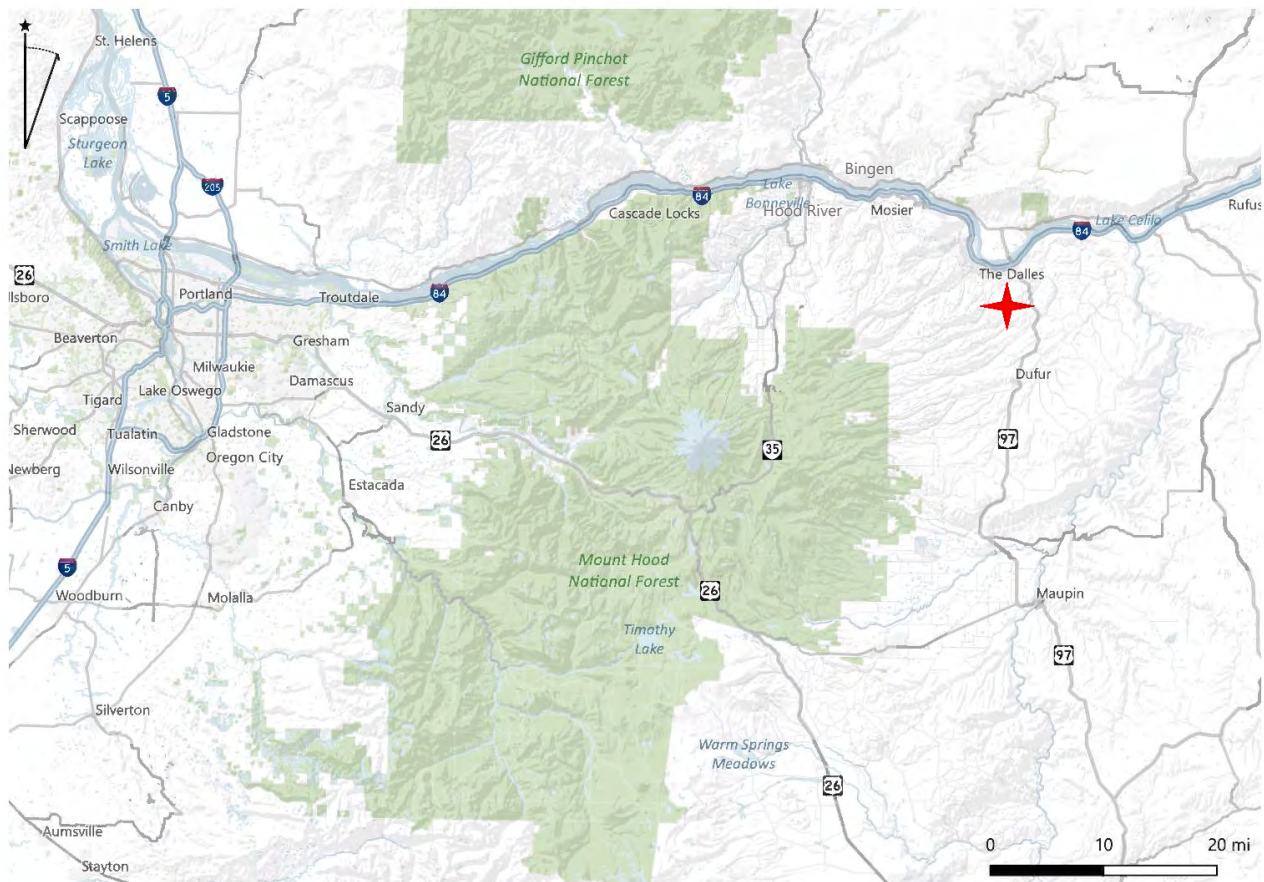
The Action Plan was based on the evaluation of regional industry competitive advantages, corresponding workforce skills, and local barriers and opportunities for growth. This information was supplemented by the input of 30 regional economic development stakeholders representing tourism organizations, business owners, government officials, and real estate professionals across the

community. The draft Action Plan was shared with stakeholders and their input shaped the final recommendations. The Action Plan does not preclude the effort to determine if additional industrial land is needed and may require an expansion of the UGB. It simply provides several additional actions to supplement that potential effort.

BACKGROUND

Overview

The City of The Dalles is a regional center for the five-county Mid-Columbia Region centrally located along the Columbia River Gorge. With a population of approximately 14,700 people, it is the county seat and largest city of Wasco County, Oregon. It is well-positioned along Interstate 84 approximately 85 miles east of Portland, Oregon and Highway 197 that connects northerly to Dallesport, Washington across the Columbia River. It is surrounded by unique natural beauty of the Gorge, farmlands and Mt. Hood to the south.



As the end of the historic Overland Oregon Trail, The Dalles was the central location for commerce and activity within the Gorge. Today, the city continues to serve as the regional center for retail, government and institutions such as the Mid-Columbia Medical Center, Columbia Gorge Community College, and Wasco County Courthouse. The Dalles region traditionally thrived on manufacturing industries tied to agriculture and metals such as the aluminum plant. The regional economy has since

diversified with the closure of the plant and more recent significant private investments such as the Google data center, the success of the Port attracting new business, downtown investments and burgeoning unmanned aviation systems (UAS) industry. The City of The Dalles would like to build off these opportunities by taking proactive steps to plan for future growth as well as engage in short-term actions that foster economic development and leverage its unique position in the region.

Our Process

An EOA and Action Plan must be devised by and for the community it serves. While looking at national and state trends and conducting a data analysis are important to determining trends, assets, and challenges, soliciting input from local businesses and community members gives this analysis much-needed context. By providing a platform for community members and business leaders to share their lessons and new ideas, we hope to generate a universal understanding among public, private, and governmental partners. To identify the economic development priorities of The Dalles, the following five steps were followed:

Examine national and state trends. Discuss with stakeholders the current national trends driving economic development and how they align with local development priorities and trends.

Benchmark and compare the City to the Region. Provide quantitative data regarding the community profile and demographics to establish a foundation of existing conditions. This data is contrasted with the region and state to provide context.

Conduct Discussions. For a strategy to be inclusive – for the community, by the community – diverse voices and perspectives must be brought to the table. Outreach in person with economic development stakeholders is facilitated to hear from a variety of perspectives.

Identify Key Themes. It is essential that areas for investment and growth are built upon shared principles and community values that are conveyed through survey responses and stakeholder meeting feedback. Consistent messages create key themes of focus and direction that are unique to the community and shape the Goals and Objectives.

Develop Goals and Objectives. By developing a “playbook” of direction that includes priority goals and objectives, the City can identify where they should focus time and monetary resources to most effectively foster business growth and expansion.

ECONOMIC DEVELOPMENT OVERVIEW

Economic development can be defined as efforts that seek to improve the economic well-being and quality of life for a community by creating and/or retaining middle and high-income jobs and supporting or growing incomes and the tax base through diversification of the local economy. These jobs are generally placed into two different categories defined as traded and local sector, and each have distinct needs in terms of workforce and business location. In addition, these sectors require different types of support and investments from various stakeholders. These sectors are distinguished for clarification regarding strategy objectives and actions.

Traded Sector vs. Local Sector Jobs

Traded sector (also referred to as an export or basic sector) businesses include industries and employers which produce goods and services that are consumed outside the region where they are produced and therefore bring in new income to the area (e.g., metals and machinery, food processing). Workers in the traded sector tend to have higher educational attainment, work more hours, and earn higher average wages than local sector business.

As the traded sector increases employment and wages, it also enables entrepreneurs to develop skills and resources to foster innovation and start new businesses and increase employment opportunities. Furthermore, certain traded sector companies foster a supply chain effect that creates the need for additional companies to supply components of a product that is manufactured.

Local sector business consists of industries and firms that are in every region. They produce goods and services that are consumed locally in the region where they were made, and therefore circulate existing income in the area (e.g., breweries, physician offices, banks). These businesses are important as they make a community distinct and provide amenities to attract young professionals and families that drive the new economy. A sampling of traded vs. local sector businesses in the The Dalles is indicated in Table 1. The overall United States economy consists of a mix of business that include 36% traded-sector and 64% local-sector industries¹. In contrast, The Dalles region consists of 18% traded sector and 82% local sector businesses².

Table 1. Representative Traded Sector and Local Sector Businesses

Traded Sector	Local Sector
	

The following table highlights the average wage difference between traded sector jobs and local sector jobs across the United States. As the job base expands, a community is more attractive to

¹ US Cluster Mapping, 2018 <http://www.clustermapping.us/cluster>

² *ibid*

employees because they have more options for career growth. In turn, once the employment base grows, competition will occur and ultimately increase wages.

Table 2. Annual Average Wage Comparison, USA, 2018

NAICS	Industry Sector	United States Average Wage 2017
Traded Sector		
55	Management of Companies & Enterprises	\$119,885
51 -54	Information, Professional, Scientific, & Technical Services	\$99,705
42, 31-33	Wholesale, Manufacturing	\$ 71,372
48-49	Transportation Warehousing	\$ 51,726
11	Ag, forest, fish, hunting	\$34,464
Traded/Local Sector		
23	Construction	\$60,735
61, 62	Education, Health Care & Social Assistance	\$49,565
71	Arts, Entertainment, Recreation	\$37,759
Local Sector		
44-45	Retail Trade	\$31,217
72	Accommodation & Food Services	\$20,731

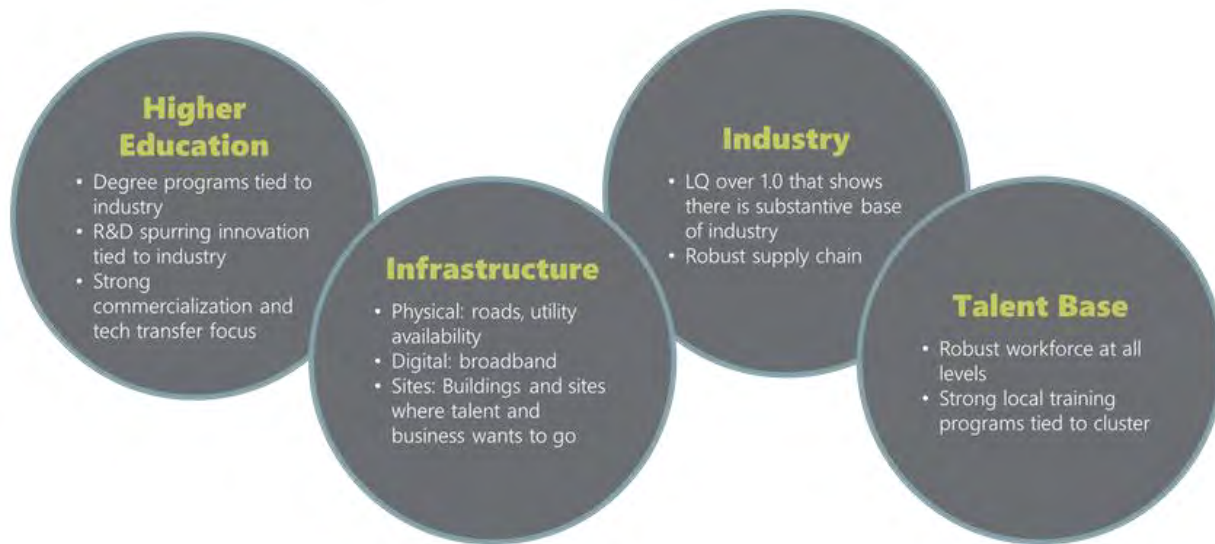
Source: Bureau of Labor Statistics, QCEW data

Industry Clusters

A cluster is a regional concentration of related industries in a particular location. Clusters are a foundational element to regional economies, making them uniquely competitive for jobs and private investment. They consist of companies, suppliers, and service providers, as well as government agencies and other institutions that provide specialized training and education, information, research, and technical support. Various regions across the US have unique clusters making them distinct: Portland, OR has semiconductors whereas Seattle, WA has aerospace. Industry clusters function on a regional metropolitan statistical area (MSA) level because assets such as workforce and transportation infrastructure are not constrained by local municipal boundaries. Therefore, in order to effectively grow an industry cluster, it is important to leverage existing assets and collaborate on a regional and state level.

An industry cluster is comprised of the following elements identified in Figure 1, with some being more important than others depending on the industry. A city plays the important role of providing the necessary infrastructure and zoned land to allow various types of industry to thrive.

Figure 1: Elements of an Industry Cluster



Source: Bridge Economic Development

Importance of Talent

The national economy is becoming increasingly more talent/knowledge-based than resource-based, meaning that people, rather than raw materials, are the most important asset to a company's value and prospects for growth. This applies to all industries, including manufacturing, professional services, and technology. This is not to suggest that The Dalles needs to focus their industrial base entirely on technology companies, but to understand that the modern economy depends upon highly skilled people to thrive. For this reason, a company's number one priority today is attracting talent. Verifying this is the Duke Fuqua School of Business CFO Global Business Outlook Survey ³. The school has conducted the survey 91 consecutive quarters since July 1996. The years 2017 and 2018 are the first time that CFO's cited attracting and retaining qualified employees was their number one concern over other factors such as input costs or regulations.

A significant cohort of the talent in demand consists of the "millennial" generation (generally ages 22 to 38 in 2019), made up of approximately 76 million people – the largest demographic group our country has seen. As this generation shapes our talent-based economy, it is important to understand what motivates them and the communities they choose in such a highly mobile environment. This group has been slower to marry and move out on their own, and have shown different attitudes to ownership that have helped spawn what's being called a "sharing economy" which suggests these trends are likely to continue⁴. Furthermore, it is likely that today's high school generation will adopt many of the same values that are driven by affinity for technology. This desired talent is attracted to a great place with jobs. Such an environment includes the following elements:

³ <https://www.cfosurvey.org/wp-content/uploads/2018/12/Q4-2018-US-KeyNumbers.pdf>

⁴ Millennials Coming of Age, Goldman Sachs, 2017

Job Base Talent moving to a new community wants to know that there are other opportunities if the job that brought them there does not fulfill expectations.

Simple Commute Many millennials are not defined by the automobile, and do not want to drive if they don't have to. As reported in Urban Land Institute (ULI) Emerging Trends 2016, miles traveled by car for those people 34 years old or younger are down 23 percent nationally. The American Automobile Association reports that the percentage of high school seniors with driver's licenses declined from 85 percent to 73 percent between 1996 and 2010, with federal data suggesting that the decline has continued since 2010. Locally, the average miles travelled by any mode – walking, driving, biking, or taking transit – is the lowest for millennials.

Urban Environment Almost all talent, including Millennials, prefer an environment with housing options, amenities, density with alternative transportation modes and retail near the work place. This urban lifestyle does not mean that an entire community must conform to urban densities. What is important is that some element of an urban lifestyle through either a healthy Main Street in a traditional downtown or denser town centers in suburbs is provided. Global commercial real estate firm Newmark Knight Frank (NKF) recently recognized that "office property owners who create a 'best of both worlds' environment by offering options to work/live/play in a walkable setting stand to capitalize the most. Corporate occupiers should keep this in mind and consider locations that offer urban amenities in a suburban setting—a blend of the active environment and convenience that today's workers, including millennials, prize".⁵ While The Dalles is not a suburban community, this finding by NKF translates broadly for employment development in various communities.

Open Culture Millennials embrace social or ethical causes⁶ and communities that are more diverse, accepting, and open to change.

The City's Role

A municipality does not create jobs. It creates a great environment so that business can easily invest and create jobs. With that understanding, the city should focus on the following elements to promote economic development.

Sites and Infrastructure Businesses need to go into buildings and develop on sites with adequate infrastructure. Furthermore, similar types of businesses like to physically group together to build a destination and allow for collaboration. Where an employer locates depends on the industry. Software is dependent on highly-skilled talent and will locate where talent wants to be. In addition, because of the lower capital investments and less dependence on transporting finished products, they can afford higher rents that allow them to locate in more urban/downtown locations. In contrast, manufacturing, while also needing talent, must consider access to transportation infrastructure and lower land and building costs to off-set capital equipment investment costs. Additionally, some manufacturing is dependent on rail infrastructure to lower operational costs. Aligning industry

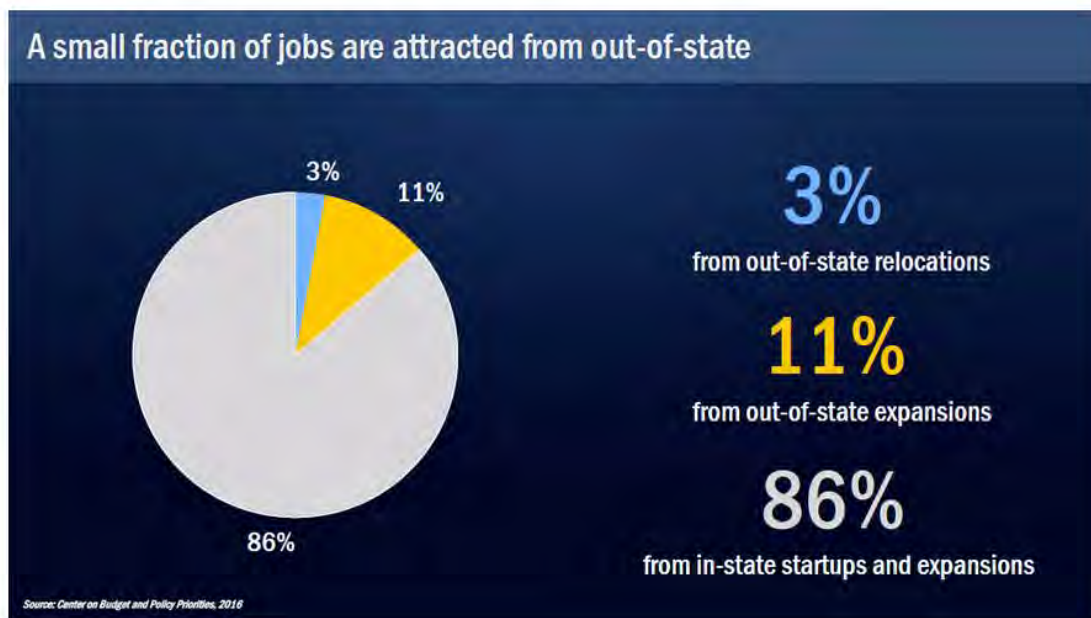
⁵ Population Data Suggests a Suburban Office Rebound Is Coming, Newmark Knight Frank, November 2018

⁶ Brookings Institution, 11 Facts about the Millennial Generation, June 2014

clusters with available subareas (sites with appropriate infrastructure) is an important role for the city to convey genuine support for economic growth.

Focus on Existing Residents As the community makes significant commitments to land use designations and infrastructure funding, it is important to make sure that the existing residents also benefit. The Dalles should support and promote programs that allow existing residents to start their own businesses or gain skills that improves opportunities to work at expanding companies. As indicated in the following figure, the majority of job growth across the United States comes from local start-ups and expansions. Focusing on local residents enhances local asset wealth and is the most efficient way to grow jobs. Details of how the city will work with community partners to accomplish this goal is outlined in the Action Plan.

Figure 2: Sources of Job Growth Across the United States



Source: Brookings, 2018

REVIEW OF NATIONAL AND STATE ECONOMIC TRENDS

Current Economic Situation & Outlook

As of July this year, the current economic expansion will hit 10 years. While the recovery officially started in 2009, it wasn't until 2016 that unemployment reached pre-recession levels of about 4.5%. During the last three to four years, the unemployment rate has reached near historic lows. After lagging during the economic recovery, wages and overall compensation have begun growing in the last couple years.

Moving forward, it is expected that growth will slow in the short-term period through 2022. Of primary concern is the slowdown of growth in China and Europe, increased volatility in stock markets as well as uncertain government policies at home and abroad including trade and Brexit. While most

domestic economic indicators have been solid, there is evidence of lower business and consumer sentiment.⁷

Long Term U.S. Challenges

Since 2007, U.S. economic growth has averaged 1.6%, almost half of rate at which it grew during most of the latter part of the 20th century and early 2000s. While considerable research is being conducted to understand the dynamics driving slower growth, many agree that demographics as well as issues in the labor market explain much of it. For example, due to slower U.S. population growth and the growth in retirements, the growth in number of hours worked has decreased. In addition, labor force participation by adults aged 25 to 54 has also fallen. Participation by prime-age men has been falling for more than 60 years, with the decline averaging about 1.5 percentage points per decade. For women, participation rose over the second half of the 20th century until peaking in the late 1990s. The U.S. could mitigate this trend with policies that bring prime-age workers into productive employment, particularly those who may have been left behind because of low skills or educational attainment.⁸

Oregon⁹

While Oregon's economic expansion continues, growth has slowed and stabilized. In recent years, the state has enjoyed robust job gains in the 3-3.5% range, or nearly 5,000 jobs per month. No longer is this the case. Oregon is expected to continue to see healthy job gains – a bit more than 2,000 per month or about 2% over this year and into 2020 – but the state is now past its peak growth rates for this expansion. Importantly, such gains remain strong enough to hold unemployment down and account for ongoing population growth. Average wages continue to increase 3-4% annually for the past 4 years. These labor market gains are translating into higher household incomes overall. Oregon's median household income is now on par with the U.S. This is the first time since the mills closed in the 1980s that this has happened.

According to the Oregon Office of Economic Analysis, currently, ten major industries are at all-time highs: private sector food manufacturing, education, and health never really suffered recessionary losses – although their growth did slow during the recession. Professional and business services and leisure and hospitality have each regained all of their losses and are leading growth today. In recent quarters retail employment, other services, transportation, warehousing and utilities, and construction, in addition to the public sector have surpassed their pre-recession levels and are at all-time highs. The nine private sector industries at all-time highs account for 64 percent of all statewide jobs. The public sector accounts for an additional 16 percent of all jobs.

⁷ <https://www.federalreserve.gov/newsevents/speech/powell20190228b.htm>

⁸ According to a recent speech given by Federal Reserve Chair Powell: Prime-age male participation has fallen some across most of advanced economies since 1995. But the decline in the United States has been much larger than most. As a result, the United States now has the fourth lowest participation rate among 34 advanced economies. For women's participation, the details are different, but the bottom line is similar. In the mid-1990s, the United States ranked in the upper tier for prime-age women's participation, but since then participation by women has advanced rapidly in many countries while it has declined slightly in the United States. Now the United States is sixth lowest among these 34 countries.

⁹ This section contains excerpts from the Oregon Office of Economic Analysis, Oregon Economic and Revenue Forecast, March 2019.

While all manufacturing subsectors have seen some growth, they are unlikely to fully regain all of their lost jobs. Oregon manufacturers typically outperform those in other states, in large part due to the local industry make-up. Oregon does not rely upon old auto makers or textile mills. The state's manufacturing industry is comprised of newer technologies like aerospace and semiconductors. Similarly, Oregon's food processing industry continues to boom, even with losses in the past couple of months.

Going forward, private sector job growth will be dominated by the large, service sector industries like professional and business services, leisure and hospitality and health. In goods-producing industries, growth over the next few years will be considerably less than that seen in the past few years. Construction is expected to add jobs at a slower pace even as the housing rebound continues as construction employment growth has far outpaced increases in new home construction during the last few years. Additionally, manufacturing is expected to see slower gains in the coming years. This growth is expected to be strongest among the state's food processors, and beverage manufacturers, predominantly breweries. Any further global weakening or strengthening of the dollar will weigh further on the outlook. Public sector employment at the local, county and state level for both education and non-education workers is growing in Oregon, as state and local revenues continue to improve along with the economy. Over the forecast horizon, government employment is expected to grow roughly in line with population growth and the increased demand for public services.

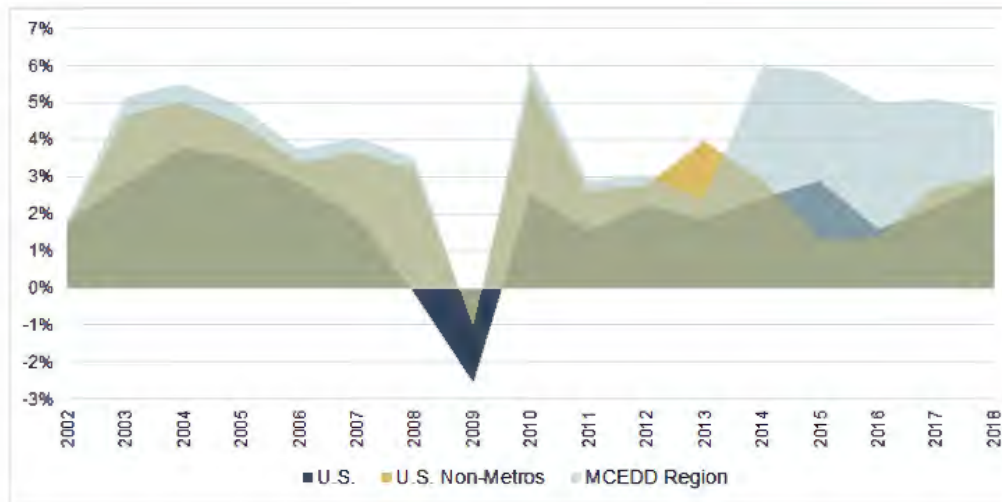
Gross Domestic Product (GDP) Growth

GDP is a key economic statistic that provides a snapshot of overall economic activity. In general, GDP provides a measure of the value of goods and services produced and purchased by households, government, business and exports as well as the value of income generated from profits. U.S. GDP growth has averaged about 2.5% since 2010, driven primarily by output generated by U.S. metro areas which are responsible for about 84% of U.S. output.

Figure 3 shows GDP growth estimates for the U.S. and U.S. non-metro areas. Overall, since 2000, growth in output generated by U.S. non-metro areas has been outpacing overall U.S. GDP growth. Non-metro share of GDP has increased from 13.3% in 2001 to 15.7% in 2017. Figure 3 also shows estimates of GDP growth in the MCEDD region based on a new prototype statistic released in December of 2018 by the Bureau of Economic Analysis (BEA). The BEA reported county-based GDP statistics for 2012 through 2015 and Bridge Economic Development estimated MCEDD GDP back to 2001 and forward to 2018 for illustrative purposes. According to an Oregon Employment Department analysis of this new BEA statistic, as of 2015, rural counties in Oregon accounted for 11.5% of statewide GDP. As for the counties with the fastest growing GDP between 2012 and 2015, the top four were counties along the Columbia Gorge/Columbia Basin: Gilliam, Wheeler, Morrow and Hood River.¹⁰ Wasco County's average annual GDP (1.08%) was among the three slowest growing counties, including Sherman (-1.84%) and Wallowa (-3.16%).

¹⁰ <https://www.qualityinfo.org/-/oregon-s-rural-economic-output?inheritRedirect=true&redirect=%2Feast-cascades>

Figure 3: GDP Growth for U.S., U.S. Non-Metros & MCEDD Region* (2001-2028)



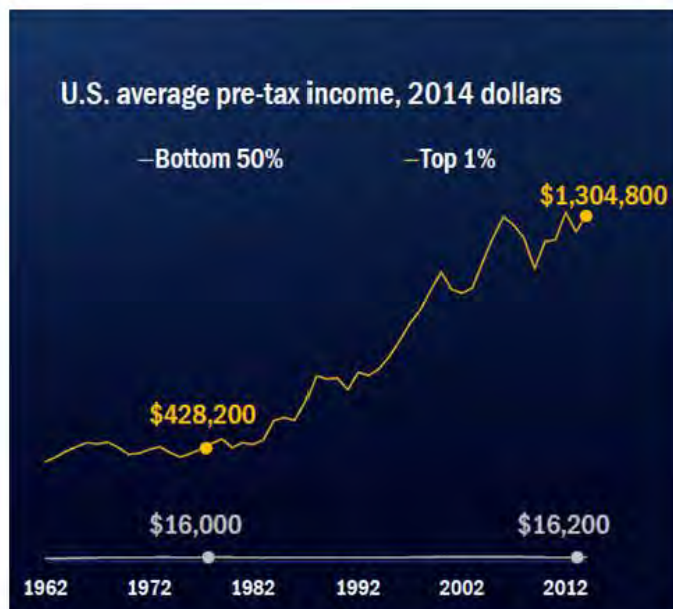
*MCEDD Region Counties: Sherman, Wasco, Hood River, Klickitat and Skamania

Source: Bureau of Economic Analysis & Bridge Economic Development

Income Disparity

Surveys and tax data show that wealth inequality has increased dramatically since the 1980s, with a top 1% wealth share around 40% in 2016 vs. 25–30% in the 1980s¹¹. The share of wealth owned by the bottom 90% has collapsed in similar proportions. This trend is also reflected in the following figure.

Figure 4: US Average Pre-Tax Income, 2014 dollars

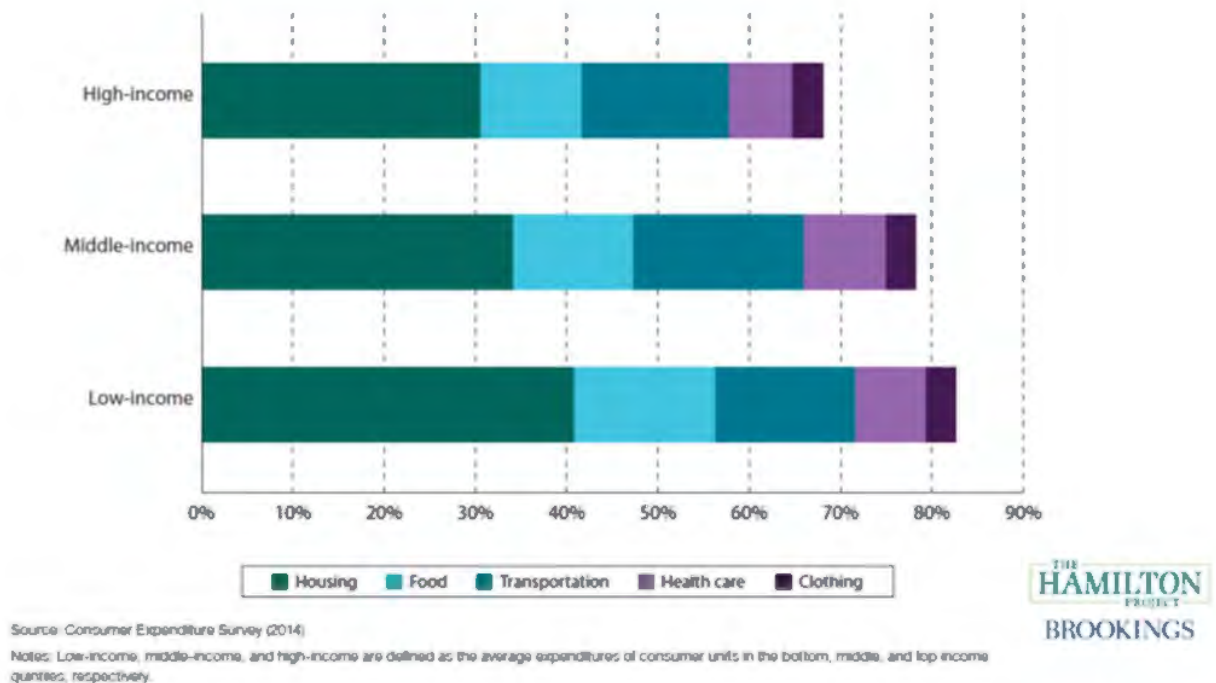


Source: Brookings, 2018

¹¹ Global Wealth Inequality, National Bureau of Economic Research, January 2019

Economic development should focus efforts on increasing opportunities to build wealth for the bottom portion of wage earners through programs and that improve access to skilled jobs and reducing costs pertaining to housing, transportation and health care. As indicated in the following figure, basic costs of living have more of an impact on low-income wage earners.

Figure 5: Share of Household Expenditures on Basic Needs by Income



Source: Brookings 2018

REVIEW OF REGIONAL AND LOCAL ECONOMIC TRENDS

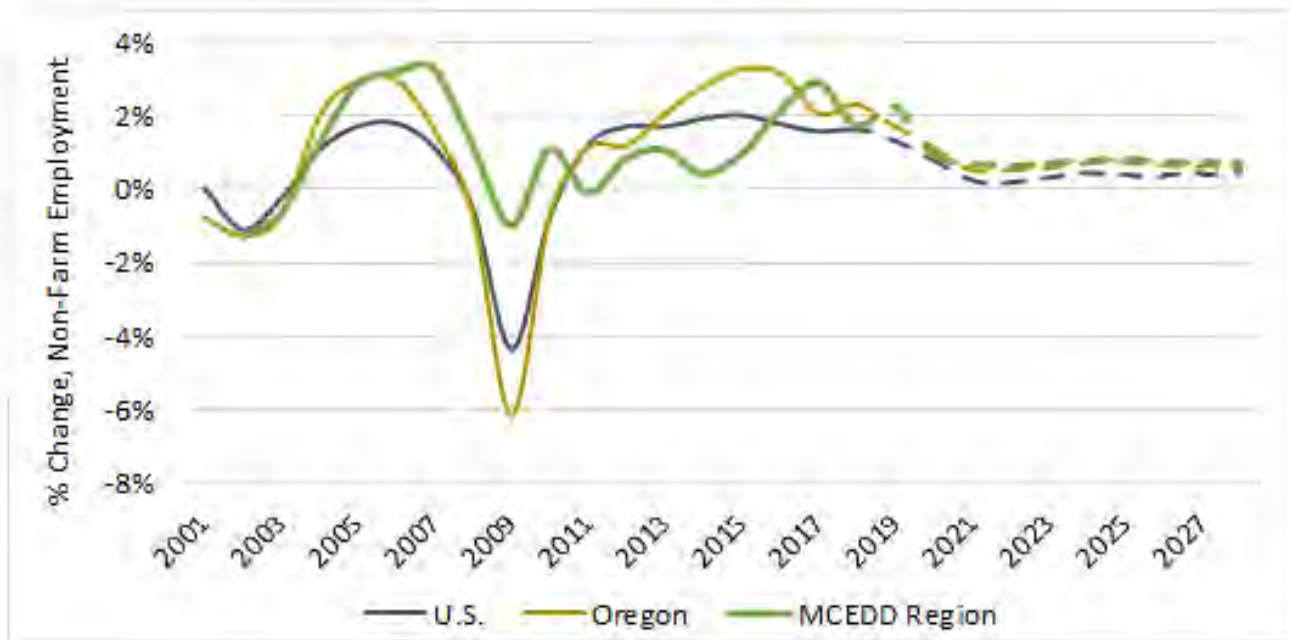
Regional Employment Growth

National and state employment have grown since 2010 by 1.7% and 2.3%, respectively. MCEDD region employment has increased by 1.2% with most growth realized in the last five years. While the Gorge did not experience the Great Recession as severely as the state, it did not begin fully recovering until 2015-2016.

Employment within the MCEDD region is primarily driven by Hood River County and Klickitat County, which have averaged 1.9% and 2.0% annual average growth since 2010. Wasco County and Sherman County both averaged 1.0% growth since 2010 while Skamania County averaged 0% growth.

During the next year or possibly two and thereafter, the general consensus is that the U.S. as well as Oregon can expect continued but reduced job growth. According the Oregon Office of Economic Analysis employment forecast, Oregon job growth will average 0.8% annually through 2028 while the U.S. is expected to average 0.5% job growth through 2028. In light of this, Bridge Economic Development estimates MCEDD region employment growth will average 0.9% through 2028.

Figure 6: Change in Non-Farm Employment, U.S., Oregon & MCEDD Region (2001-2028)



*MCEDD Region Counties: Sherman, Wasco, Hood River, Klickitat and Skamania

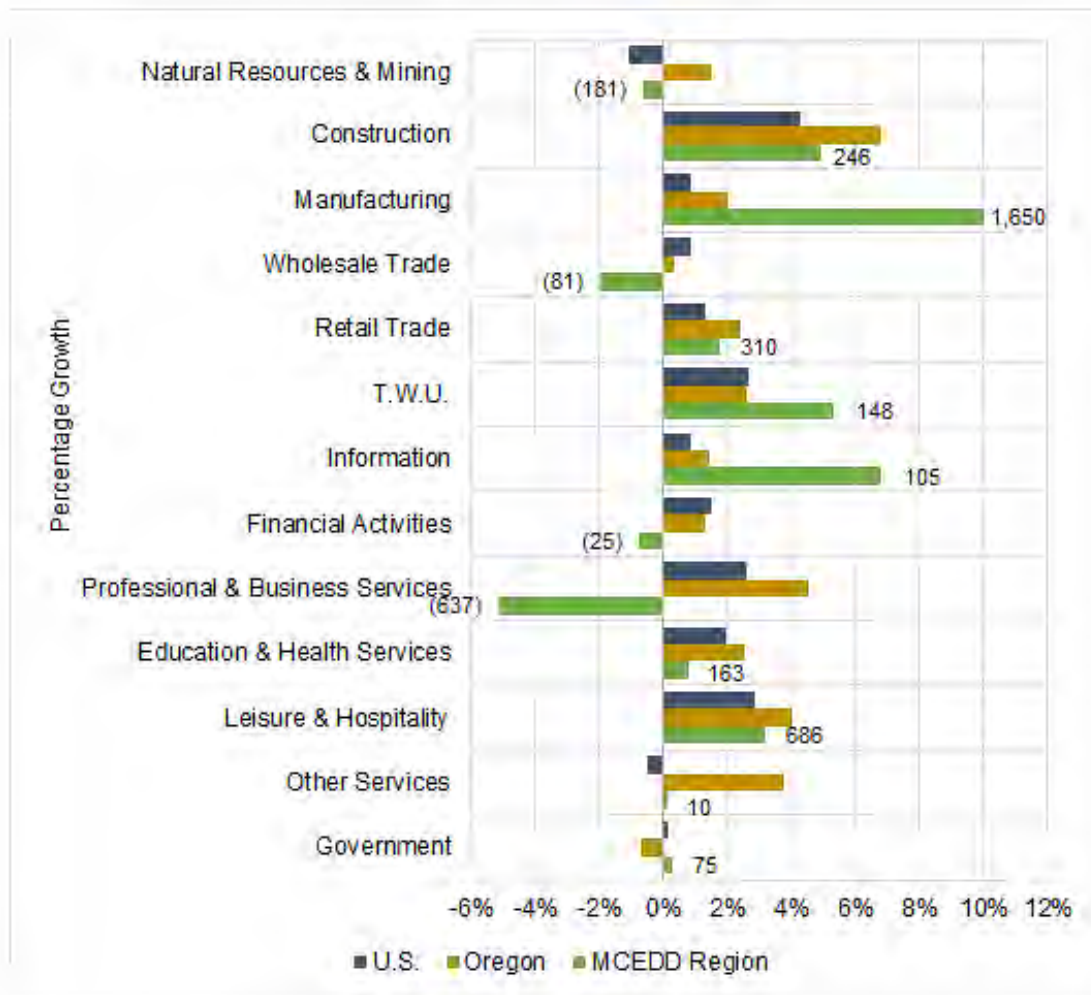
Source: Bureau of Labor Statistics, Oregon Employment Department, Washington Employment Security Department, Oregon Office of Economic Analysis & Bridge Economic Development

Regional Industry Sector Employment Growth

Between 2012 and 2017, most industry sectors experienced a period of growth. During the five years, Oregon industry sectors have generally outpaced industry sector growth nationwide with the exception of Wholesale Trade, Transportation & Warehousing and Financial Activities.

At the U.S. and state level, Construction has outpaced all other industries in growth, followed by Professional & Business Services and Leisure & Hospitality. Within the MCEDD region, Manufacturing has outpaced all other industries with Klickitat County experiencing an annual average of 24% employment growth between 2012 and 2017 and an almost tripling of its manufacturing employment.

Figure 7: Industry Sector Growth, U.S., Oregon & MCEDD Region (2012-2017)



*MCEDD Region Counties: Sherman, Wasco, Hood River, Klickitat and Skamania

Source: Bureau of Labor Statistics, Oregon Employment Department, Washington Employment Security Department & Bridge Economic Development

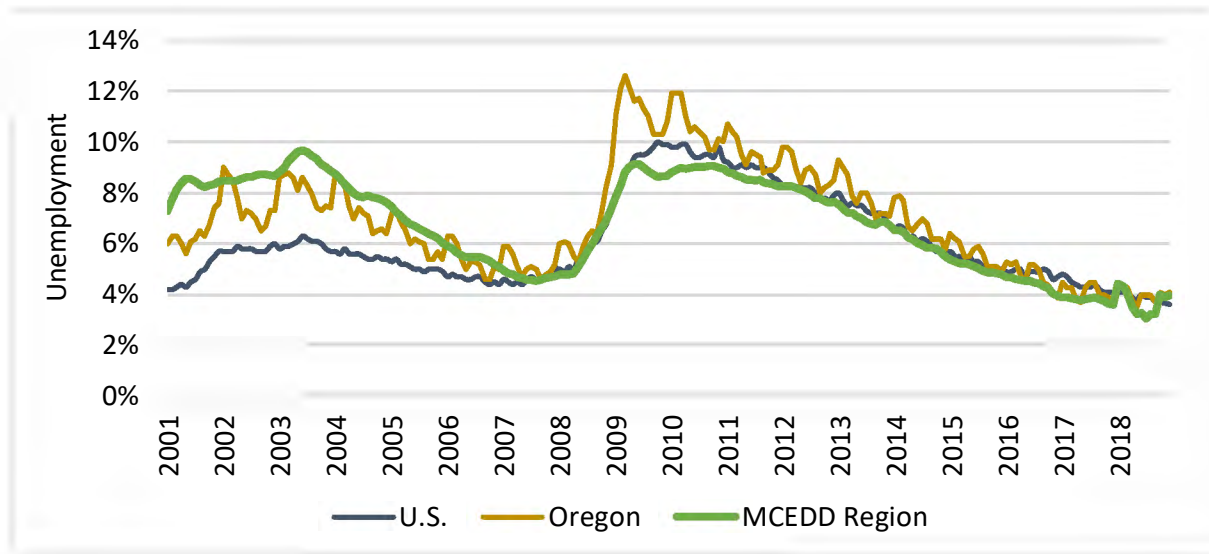
Regional Unemployment

Figure 8 displays the U.S. Oregon and MCEDD Region jobless rate between January 2000 to December 2018. After dropping to 3.6% in December 2018, a near historic low, the national unemployment rate has increased slightly to 4.0%. U.S. job gains have been steady and significant since October 2010 and have been considerable enough to recover many of the workers lost during the Recession.

According to the U.S. Bureau of Labor Statistics, total “underemployment” in the U.S. – those unemployed and looking for work, as well as discouraged workers, underutilized workforce given skills and experience, as well as part-time employment by virtue of no full-time position availability – peaked at roughly 17% in 2009 and remained above 12% for roughly four years until September of 2014. It has been declining since and it now stands at 8.1%.

Oregon's employment rate has tracked with the national rate albeit generally trending slightly higher. As of December 2018, Oregon's unemployment rate was 4.3% while the MCEDD region had an unemployment rate of 4.0%.

Figure 8: Unemployment Rate, U.S., Oregon & MCEDD Region* (2001-2018)



*MCEDD Region Counties: Oregon Counties only - Sherman, Wasco, Hood River

Source: Bureau of Labor Statistics, Oregon Employment Department, Washington Employment Security Department & Bridge Economic Development

Local Economic Trends and Demographics

Community & Economic Outlook

Given concern at the national and state level regarding the short-term economic outlook, it is likely that The Dalles will experience a slowdown in the next two to three years, however the slowdown locally may be less severe than that expected at the state level. The Gorge defied the last recession to a certain extent in that while some sectors slowed, overall the region did not suffer significant losses as did many communities across the state.

Moving forward, sustaining modest growth rates in economic activity is dependent on the community's ability to sustain higher levels of population growth.¹² While an economic opportunity

¹² Population growth in The Dalles has been relatively flat during the last ten years as has its labor participation rate (the percentage of working age adults who are participating in labor markets) indicating that growth in its labor force has been flat or possibly negative. Further, it is likely that employment growth gains in The Dalles have been primarily dependent on workers willing to commute from other communities. Reinforcing this assumption is updated commuter data from the Census Bureau, the percentage of local jobs held by non-residents has increased from 53.9% in 2015 to 56.4% in 2017. The link between population growth and economic activity in developed economies has been well-documented. For developed economies, an increasing population increases labor supply and is closely linked to an increase in economic activity or production which leads to higher income per capita. Circumstances in which population growth is not linked with economic growth are most often seen in underdeveloped economies where population growth outpaces economic growth or where regulations are not in place to ensure the proper use and sustainability of resources. However, U.S. communities experiencing flat or negative population growth are frequently plagued with employment and economic stagnation. As The

analysis is focused on employment growth, our analysis of the community leads us to conclude that solving housing, and particularly, housing for households with higher income levels, is one of the single most important priorities for the community to be able to retain current high skilled labor as well as attract the households with higher education levels, higher level occupations skills and higher income levels. Overall provision of a housing supply that is available to a wide range of household incomes plays an important role in sustainable job growth and economic development.

Population Growth

Figure 9 illustrates population growth in The Dalles between 2010 and 2018, during which time the city averaged a 0.6% annual growth rate, adding 635 residents. For comparison, we also included growth for the 5-County MCEDD region (Sherman, Wasco, Hood River, Klickitat and Skamania Counties) which added 7,396 residents and averaged 1.1% annual growth, driven primarily by Hood River and Klickitat Counties. Oregon's population rate over the same period is 1.1%. Since 1980, The Dalles has consistently averaged a 0.6% annual growth rate in population and as is discussed later in this report, although the city is able to draw labor from a larger geographic area, it is possible that the city's low rate of population growth has hindered economic growth and activities.

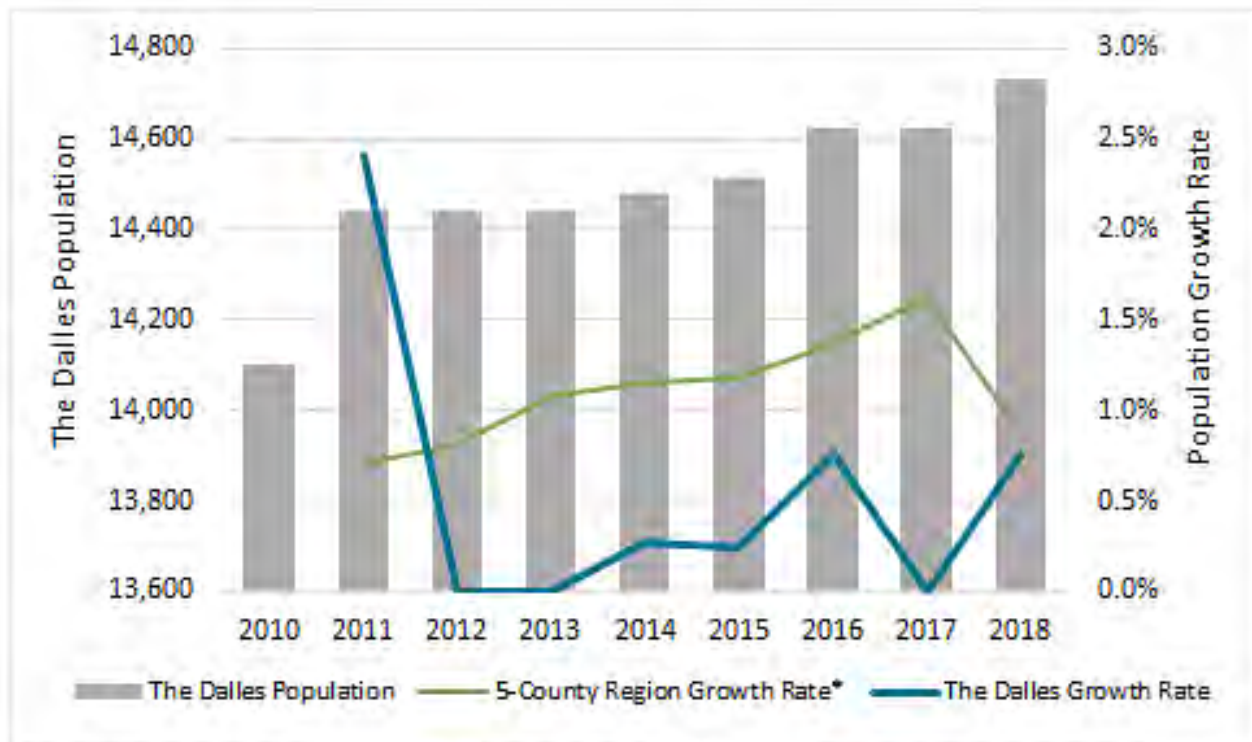
Dalles aspires to maintain its historical position as an economic hub in the Gorge, its growth in population will need to be high enough to support increases in labor supply. For further reading, please see:

Peterson, E. Wesley F. "The Role of Population in Economic Growth." Creative Commons Attribution 4.0 License, 2017. <https://doi.org/10.1177/2158244017736094>.

Baker, Dean, et al. "Asset Returns and Economic Growth." *Brookings Papers on Economic Activity*, vol. 2005 no. 1, 2005, p. 289-330. Project MUSE, doi:10.1353/eca.2005.0011.

Piketty, Thomas. 2015. "About Capital in the Twenty-First Century." *American Economic Review*, vol. 105 no. 5, 2015, p. 48-53. DOI: 10.1257/aer.p20151060.

Figure 9: The Dalles Population Growth (2010-2018)



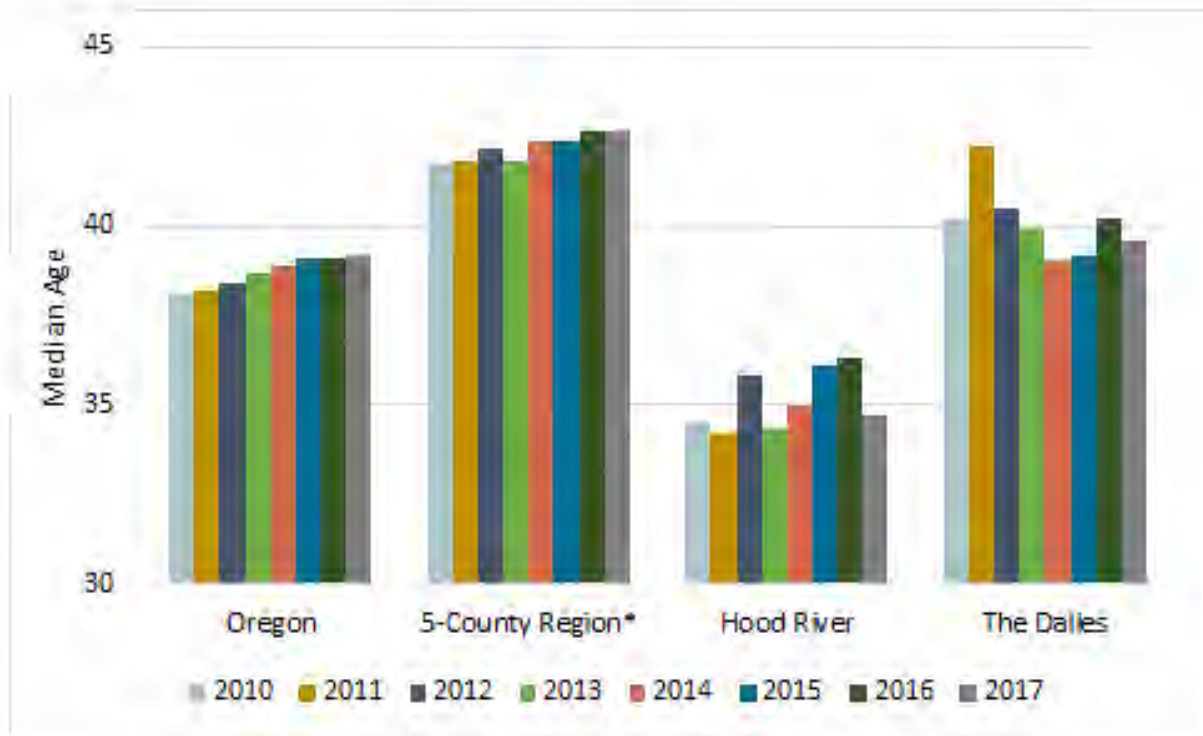
*MCEDD Region Counties: Sherman, Wasco, Hood River, Klickitat and Skamania

Source: PSU Population Research Center

Median Age

The median age in The Dalles has held steady at 39.6 since 2010. The Dalles is slightly younger than the overall MCEDD region, which averages a median age of 42.7 but older than the median age of 34.7 in the City of Hood River. Maintaining a relatively younger population will be important to the city's future economic and employment growth prospects in that the city will have a balanced proportion of prime-age working adults to maintain and spur a sustainable level of economic activity.

Figure 10: Median Age, Oregon, MCEDD, Hood River & The Dalles (2010-2017)



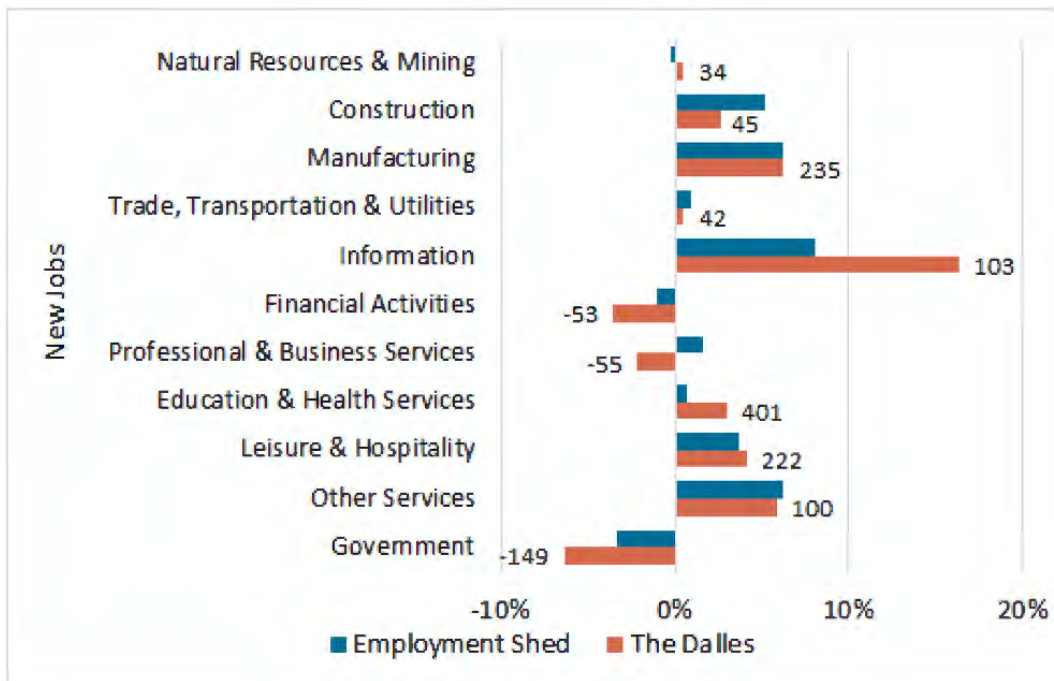
*MCEDD Region Counties: Sherman, Wasco, Hood River, Klickitat and Skamania

Source: PSU Population Research Center

Employment & Wage Growth

Since at least 1980, employment growth in The Dalles has, with a few years of exception, outpaced population growth at roughly 1.3%. Between 2012 and 2017, employment in The Dalles grew by 1.8% annually. In addition, The Dalles's share of Wasco County employment has continued to increase from about 73% in 2006 to 87% in 2015. Figure 11 shows employment growth (absolute and annual average growth rate) by industry sector for The Dalles between 2012 and 2017. For comparison, annual average growth rates for The Dalles's "employment shed" is also shown. The employment shed includes The Dalles and surrounding communities within a commute distance in Wasco and Hood River Counties (e.g. Hood River, Dufur, Mosier, etc.). Most industries grew at moderate rates of 3% to 5% between 2012 and 2017. While the financial activities and professional & business services sectors declined over the period, they are expected to return to their long-term growth rate which averages between one and two percent.

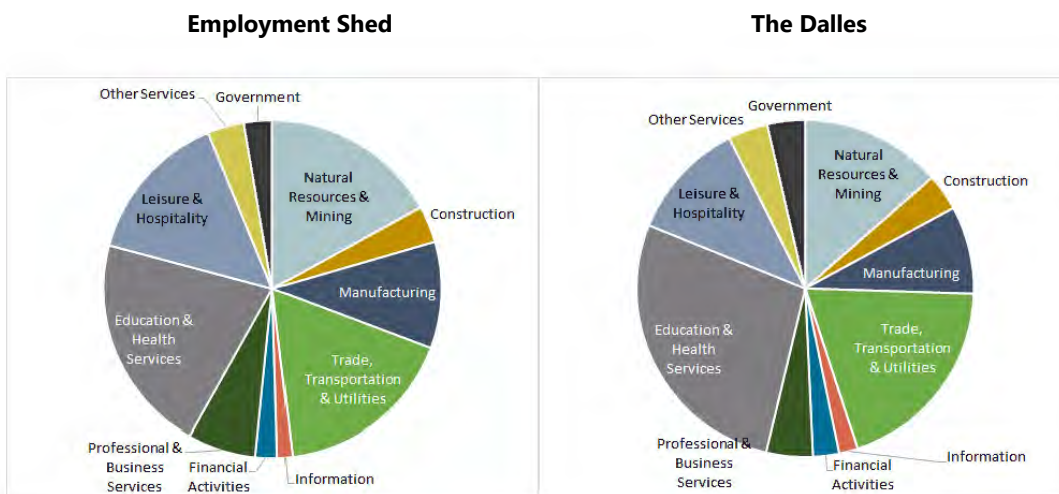
Figure 11: The Dalles 5-Year Employment Growth by Industry (2012-2017)



Source: Oregon Employment Department QCEW

Figure 12 displays the share of industry sector employment for The Dalles and its employment shed. Relative to its employment shed, The Dalles contributes a greater share of employment in Trade, Transportation & Utilities, Information, Education & Health Services and Government.

Figure 12: The Dalles Share of Industry Employment vs the Employment Shed (2017)



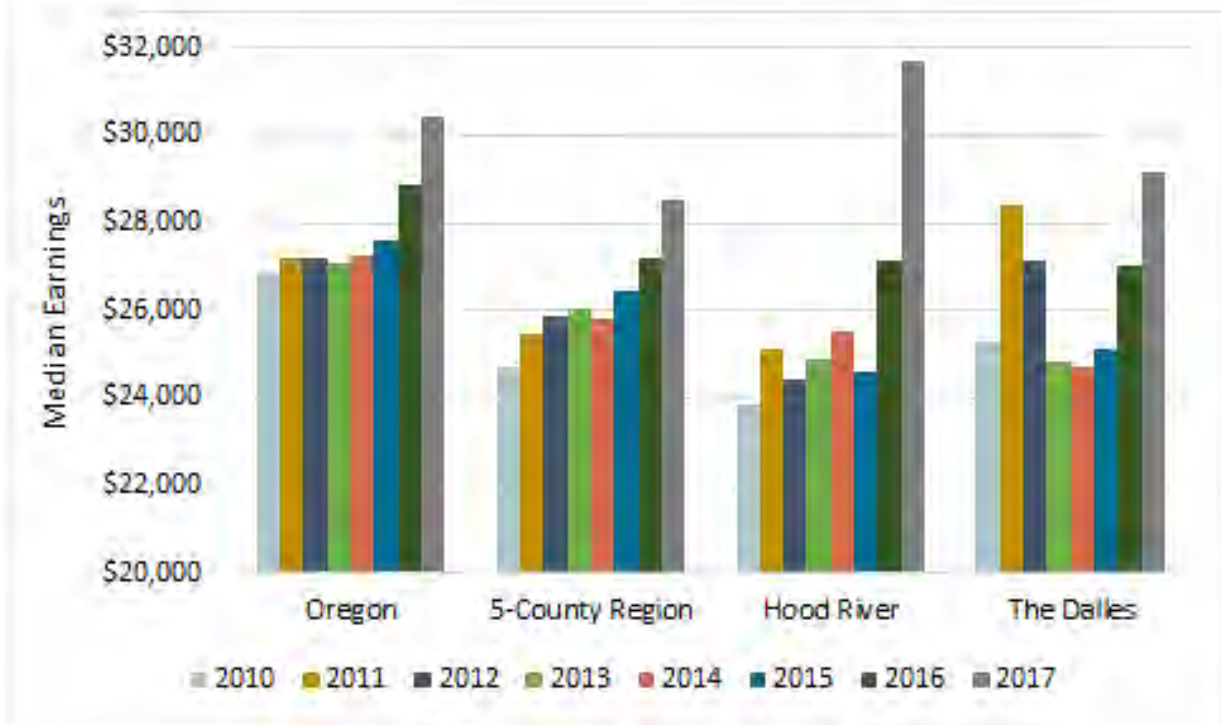
Source: Oregon Employment Department QCEW

Note: The Information sector is composed of jobs in the publishing industries, including software publishing, and both traditional publishing and publishing exclusively on the Internet; the motion picture and sound recording industries; the broadcasting industries, including traditional broadcasting and those broadcasting exclusively over the Internet; the telecommunications industries; Web search portals, data processing industries, and the information services industries.

Average wages for workers started inching up in 2016 as can be seen in median earnings in Figure 13. Median earnings in The Dalles increased annually by 2% between 2010 and 2017 but by 8% annually

in 2016 and 2017. The median earnings increases in 2011 and 2012 are likely due to the influx of higher wage jobs in Information experienced in The Dalles around those years.

Figure 13: Median Earnings/Worker, Oregon, MCEDD, Hood River & The Dalles (2010-2017)



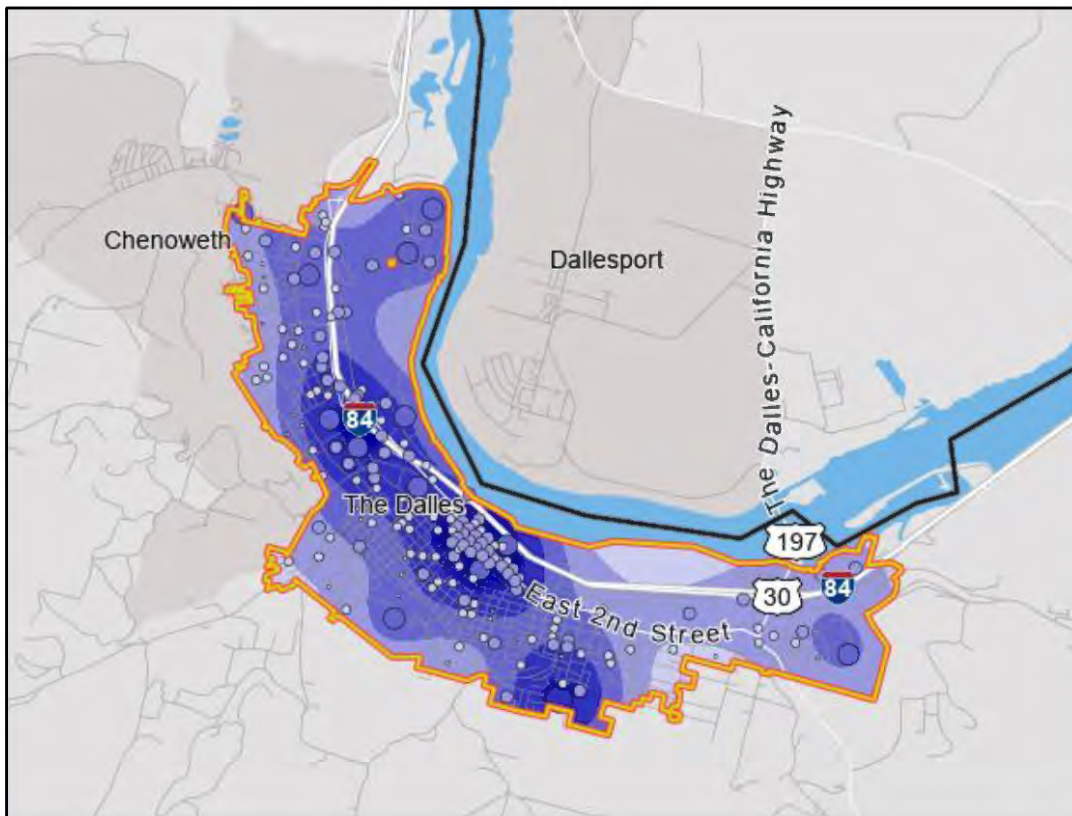
*MCEDD Region Counties: Sherman, Wasco, Hood River, Klickitat and Skamania

Source: U.S. Census Bureau, American Community Survey (ACS) 5-Year Estimates

Employment Densities & Commuter Patterns

Figure 14 illustrates employment density concentrations in The Dalles. Employment is concentrated (dark blue portion of the map) along Highway 84 in downtown and west of downtown.

Figure 14: The Dalles Employment Concentrations (2015-2017)

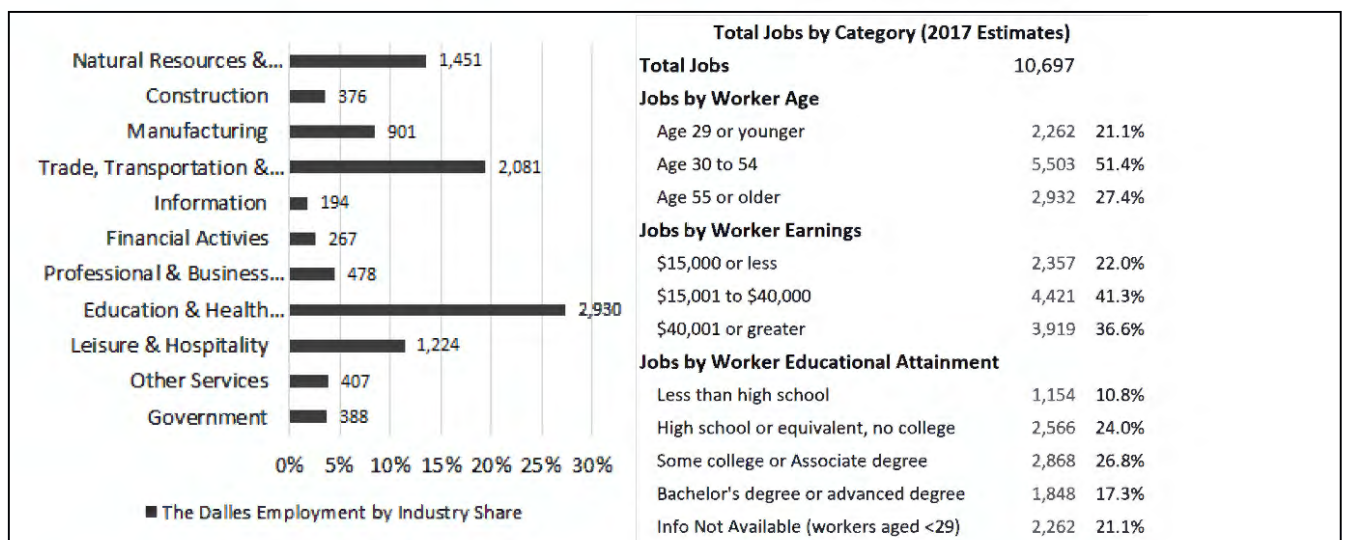


Source: U.S. Census Bureau On the Map

Note: The above U.S. Census Bureau On the Map figure does not reflect the accurate city limits of The Dalles on the north end of the City, but effectively captures the majority of employment concentrations.

As of 2017, the city had 10,697 jobs, with Education and Health Care accounting for more than a quarter of all jobs, followed by Retail Trade, accounting for 15% of jobs. Figure 15 also shows the breakdown of workers by age, earnings and educational attainment.

Figure 15: The Dalles Employment Categories (2015-2017)

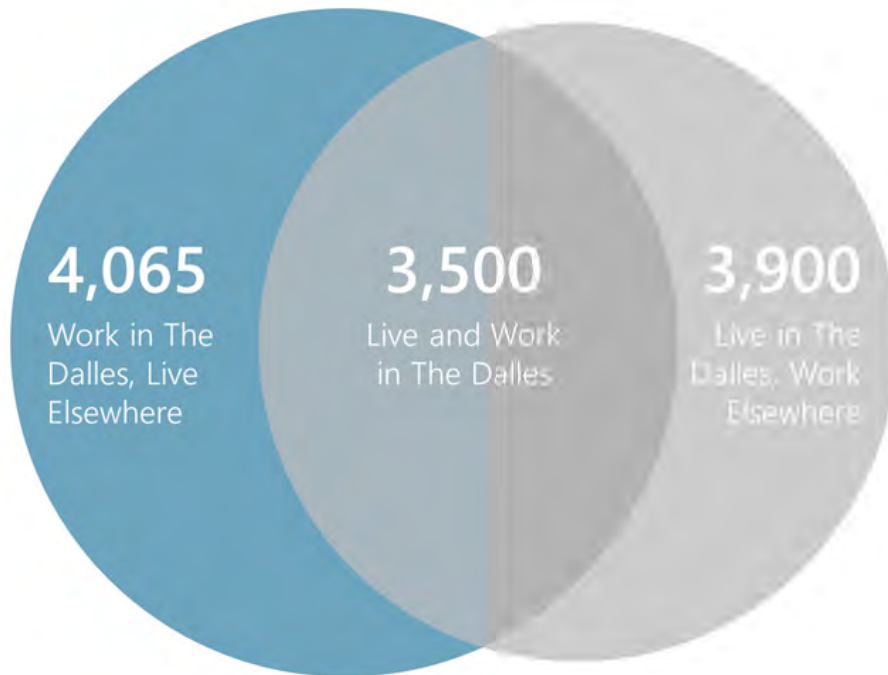


Source: U.S. Census Bureau On the Map and Oregon Employment Department QCEW

Commute Patterns

Commuting patterns for those who work and reside in The Dalles is rather balanced across all patterns. However, the larger number of workers who work in the city and live elsewhere suggests the opportunity to attract more people to live and work in The Dalles.

Figure 16: The Dalles Commute Patterns

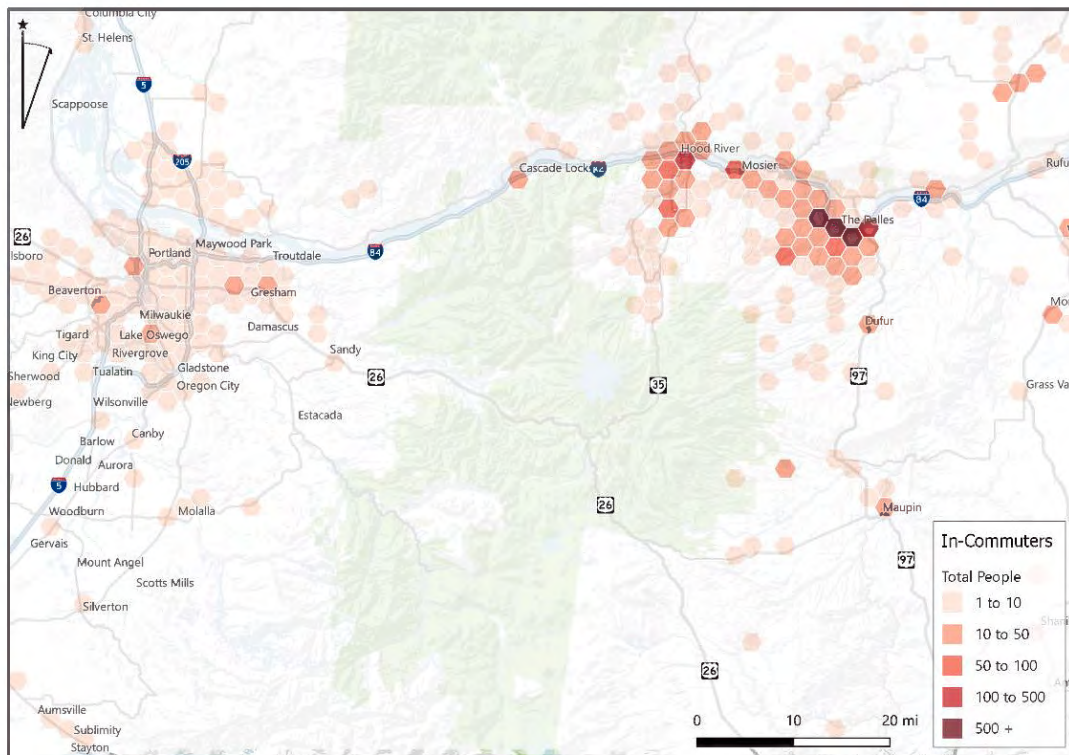


Source: LEHD 2015

Below, Figure 17 and Figure 18 illustrate commute patterns for workers both living and/or working in The Dalles.

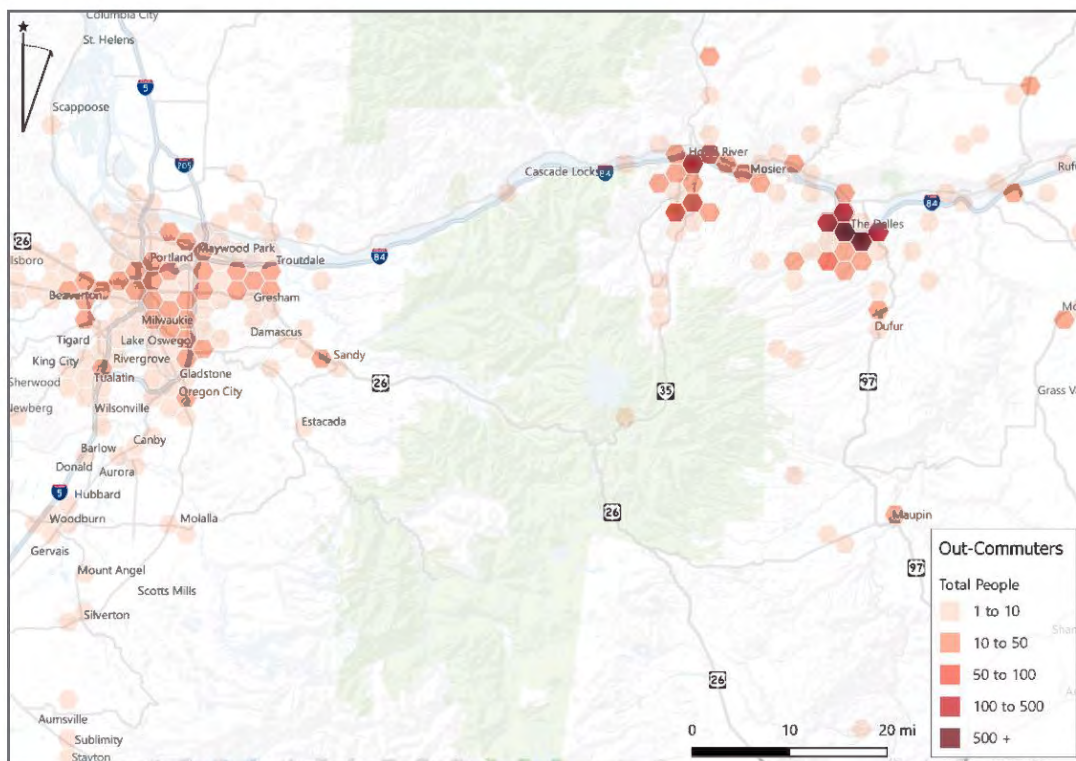
Figure 17 indicates that most workers live in The Dalles and surrounding communities, including Hood River but a significant number of workers commute from the Portland metro area. Similarly, most residents work in The Dalles and surrounding communities but an even more significant number commute into the Portland metro area for work.

Figure 17: Where Workers Live (2015)



Source: U.S. Census Bureau On the Map

Figure 18: Where Residents Work (2015)

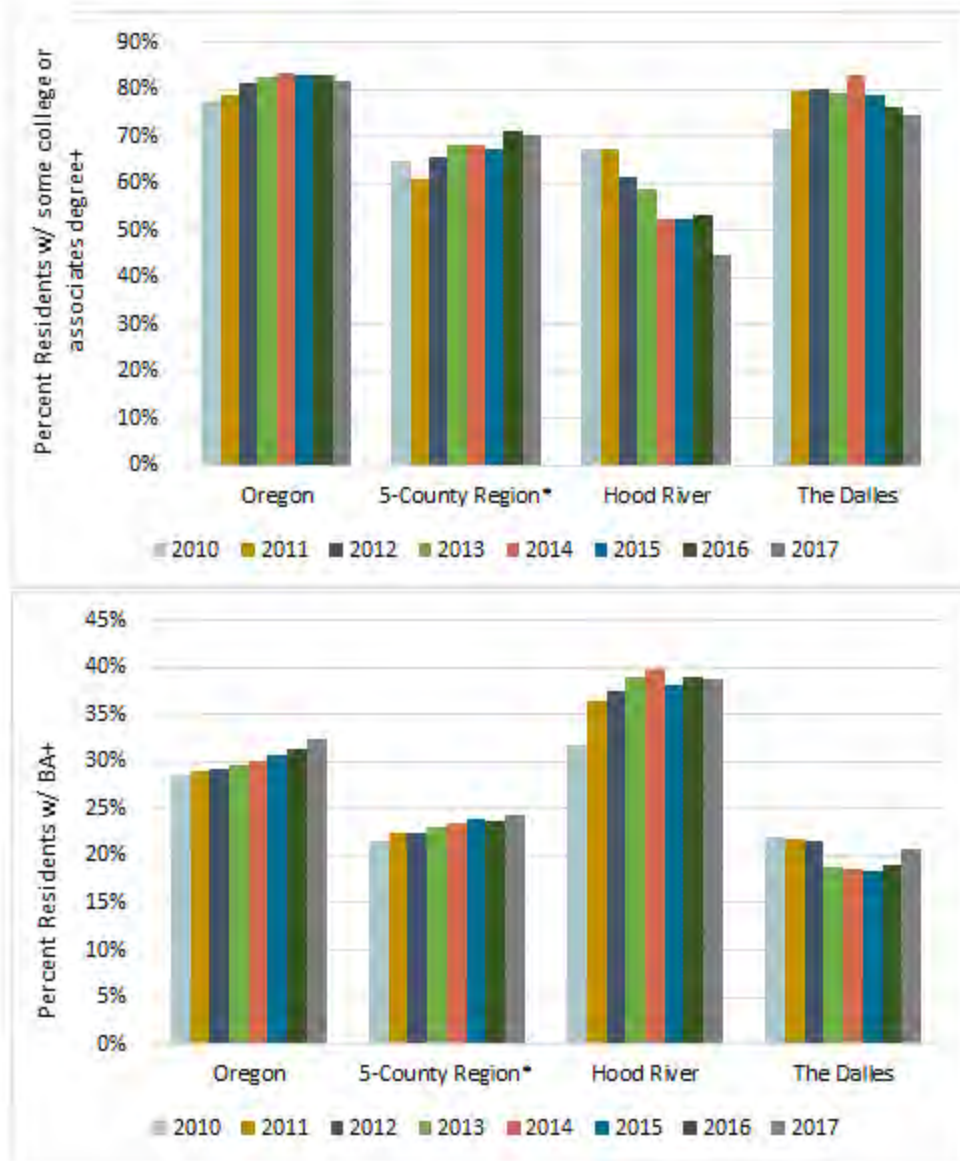


Source: U.S. Census Bureau On the Map

Educational Attainment

Figure 19 shows educational attainment for residents with some post-secondary education or associate's degree and separately, residents with a bachelor's degree. The Dalles approaches statewide percentages of residents with post-secondary or associate's degree education. The levels of which have dropped in The Dalles since 2014 but the drop has accompanied a simultaneous increase in the number of residents with a bachelor's degree. As of 2017, 74.3% of The Dalles residents had post-secondary and associate's degrees while 20.8% of residents had a bachelor's degree. The degree to which The Dalles is able to maintain or grow future economic activity will depend on the community's ability to attract and retain residents with bachelor's degrees and targeted post-secondary education levels.

Figure 19: Educational Attainment, Oregon, MCEDD Region, Hood River & The Dalles (2010-2017)



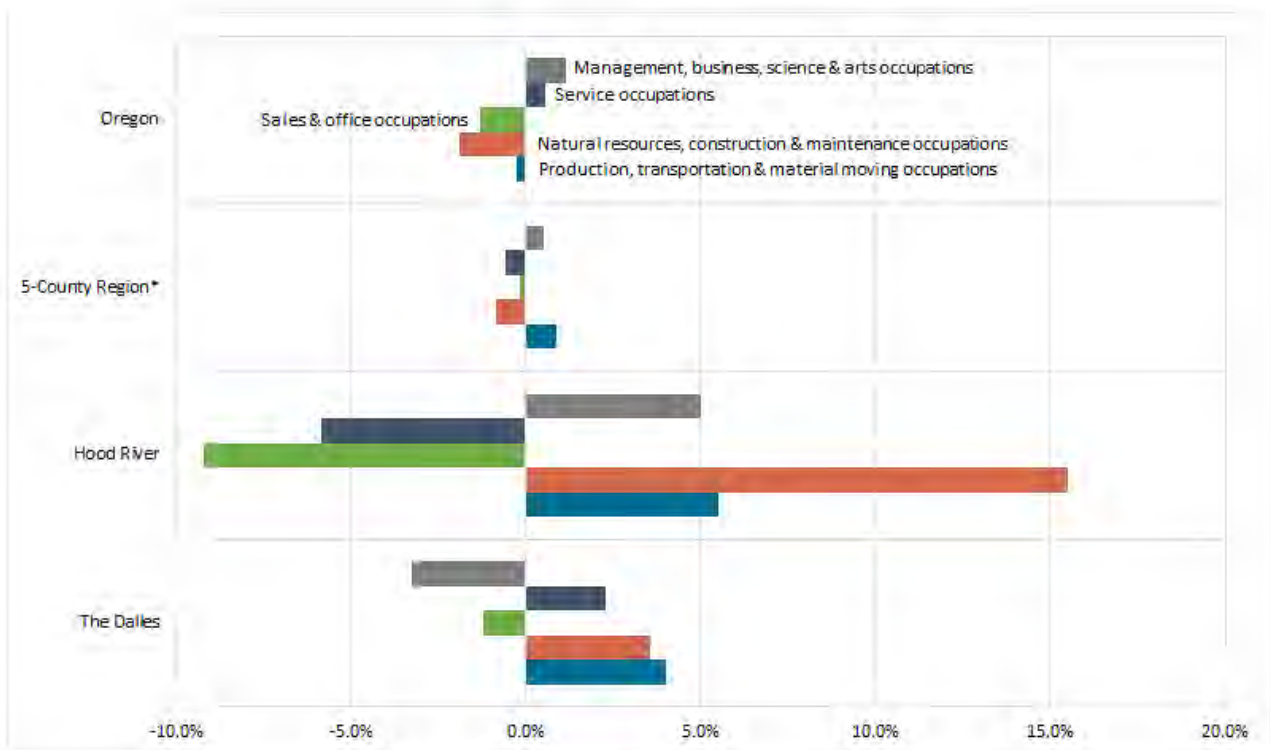
*MCEDD Region Counties: Sherman, Wasco, Hood River, Klickitat and Skamania

Source: U.S. Census Bureau, ACS 5-Year Estimates

Occupational Skills & Outlook.

Since 2011, The Dalles has experienced an influx of residents (new or newly experienced and/or trained) working in production, transportation and material moving occupations; natural resource, construction and maintenance occupations; and service occupations. Change in local residents' occupational skills in The Dalles, shown in Figure 20, also indicates a decrease in Management and professional occupations. Moving forward, increased and sustainable economic activity will depend on the reversal of the recent trend in the loss of occupations in management, business, science and arts. Given the occupational forecast in Figure 21, this is also dependent on the increase in educational attainment levels.

Figure 20: Change in Residents' Occupational Skills, Oregon, MCEDD Region, Hood River & The Dalles (2011-2017)



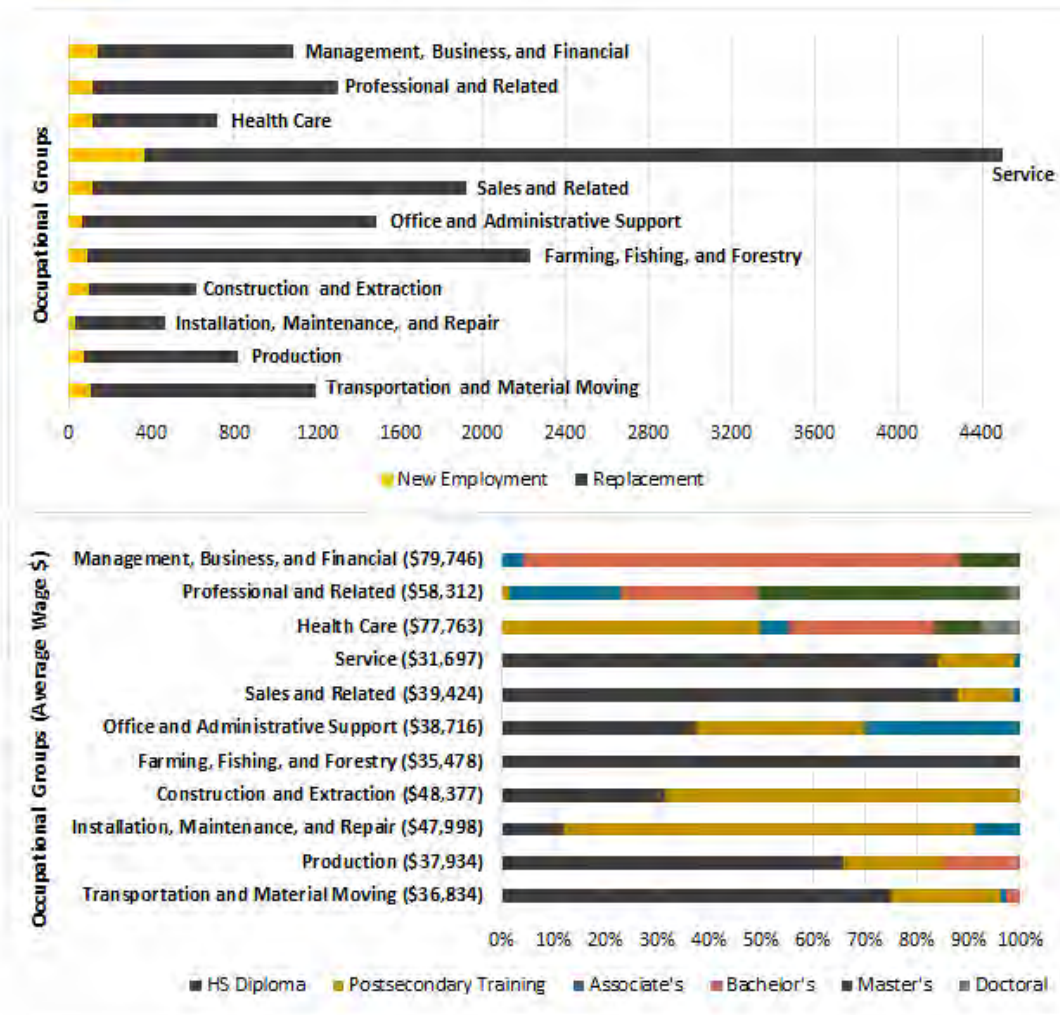
*MCEDD Region Counties: Sherman, Wasco, Hood River, Klickitat and Skamania

Source: U.S. Census Bureau, ACS 5-Year Estimates

Over the next ten years, The Dalles is expected to have nearly 16,500 openings for various occupational skills. Of those openings, 92% or 15,150, will be replacement openings while 8% or 1,332 will be new employment. Demand for occupations will be greatest in "Service" occupations, primarily in Food Preparation and Personal Care, but also Protective Service and Building and Grounds Maintenance. Natural Resource related occupational skills will be in high demand as well to fill the gap left by upcoming retirements.

Figure 21 illustrates the forecast of openings by occupational group through 2027. The second chart shows the breakdown in competitive education levels for the occupation forecast.

Figure 21: The Dalles Occupational Forecast (2017-2027)

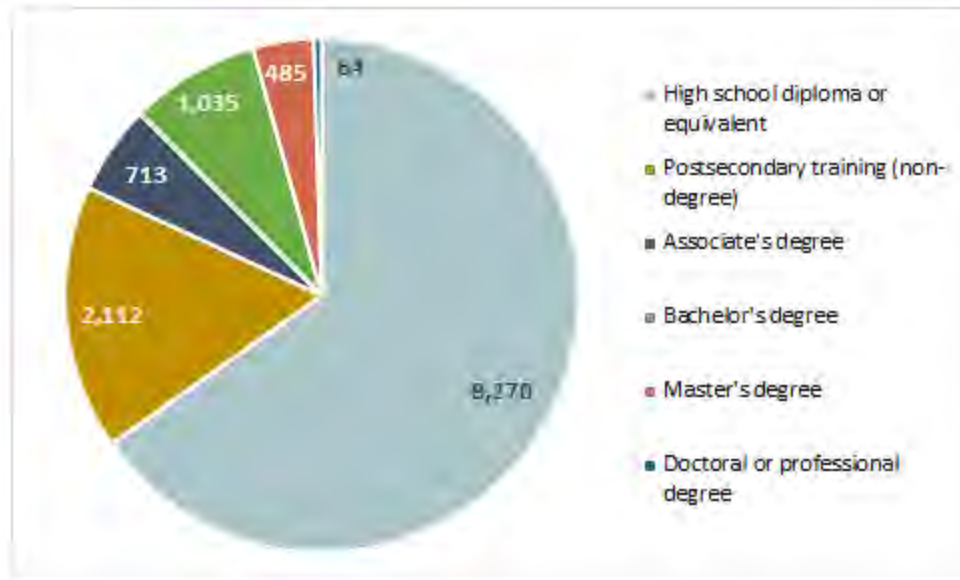


Source: Oregon Employment Department Regional Occupational Forecast

Note: Contrary to Figure 20, in which The Dalles experienced a decline in Management, Business & Financial occupations, Figure 21 forecasts an increase in these types of occupations. This can be explained partly by the two different data sources used but the primary explanation is that Figure 21 is extrapolating a share of growth in occupations for The Dalles from a regional forecast. It could be that The Dalles will experience a reversal of the trend between 2017 and 2027, or that Figure 21 is overestimating the growth in the number of Management, Business & Financial occupations through 2027.

Figure 22 shows the breakdown in the number of workers with varying levels of education to meet the need for occupations, both new and replacement, through 2027. Following Figure 22 is a list of example occupations for each educational category.

Figure 22: The Dalles Competitive Educational Needs for Future Occupational Openings (2017-2027)*



*Does not include some occupational categories for which OED is unable to report numbers due to confidentiality.
Source: Oregon Employment Department Regional Occupational Forecast

List of Example Occupational Openings

High school diploma or equivalent	Food Service Managers
Assemblers and Fabricators	Forest and Conservation Technicians
Tellers	Police and Sheriff's Patrol Officers
Receptionists and Information Clerks	Teacher Assistants
Cooks	Bookkeeping, Accounting, and Auditing Clerks
Agricultural Equipment Operators	
Agricultural Workers	Bachelor's degree
Laborers and Freight, Stock, and Material Movers	Supervisors/Managers of Police & Detectives
Hand Packers and Packagers	Human Resources Managers
Retail Salespersons	Chief Executives
	Marketing Managers
Postsecondary training (non-degree)	Cost Estimators
Water/Wastewater Treatment Plant/System Operators	Software Developers, Applications
Telecommunications Equipment Installers and Repairers	Biological Technicians
Machinists	Computer Occupations, All Other
Pharmacy Technicians	Managers
Industrial Machinery Mechanics	
Electricians	Master's degree
Nursing Assistants	Elementary/Secondary School Administrators
Childcare Workers	Civil Engineers
Supervisors and Managers of Retail Sales Workers	Mechanical Engineers
	Zoologists/Wildlife Biologists
Associate's degree	Chemists
Medical Transcriptionists	Urban/Regional Planners
Supervisors and Managers of Transportation Helpers, Laborers, and Material Movers	School Teachers
Legal Secretaries	Librarians
Agricultural and Food Science Technicians	Nurse Practitioners

Regional Industry Clusters

The State of Oregon and MCEDD have identified the competitive clusters at a state and regional level based on employer strength, workforce and industry assets such as land and infrastructure. These defined clusters can be mapped to visually convey where the different types of industry locate, size and average wages per Attachment A.

Identifying general alignment between the state, region and local industry strengths is important to maximize future marketing and talent development across all levels of government. Furthermore, Business Oregon focuses resources for infrastructure funding and business support on traded-sector industries. Therefore if the city intends to utilize such resources, it is important to identify and focus on these types of businesses.

As discussed earlier, one of the critical factors for business growth is a local talent pipeline. As the city and regional stakeholders focus efforts on traded-sector industry development, Columbia Gorge Community College (CGCC) is a critical partner in developing the essential talent needed. Programs that exist or being considered for development at CGCC are identified in relation to the clusters.

Table 3. Industry Cluster Comparison

State of Oregon Key Industries	MCEDD Target Industries	The Dalles Opportunity Clusters	CGCC Programs
Advanced Manufacturing	High Tech Unmanned Systems	Advanced Manufacturing (Unmanned Systems, Renewable Energy, Aerospace)	Associate of Applied Science: Electro-Mechanical Technology
	Renewable Energy		
High Technology		High Technology (Data Centers, Data Analysis, Software)	Associate of Science - Computer Science (AS-CS)
Food and Beverages	Manufacturing Fermentation and Value-Added Agriculture	Manufacturing Fermentation and Value-Added Agriculture	Targeted Training in Brewing and Fermentation Science (Under Consideration)
		Agriculture	
	Health Care	Health Care	Associate of Applied Science: Nursing (OCNE)
Forestry and Wood Products	Forest/Wood Products		
	Art/Culture/Tourism/Recreation		
Outdoor Gear & Apparel			
Business Services			

Source: Bridge Economic Development

Considering the existing employer strength within The Dalles, anticipated wages, employment growth and corresponding programs at CGCC, we recommend focusing on the above clusters that will leverage the regional and state efforts to bolster these industries. Firms and workers in these targeted industries can draw competitive advantage from their proximity to growing competitors, skilled workforce, specialized suppliers, and a shared base of research driven knowledge within each growing segment.

We respect and support the regional focus on the broader industry cluster of “High Tech Unmanned Systems”. However, for purposes of defining site/building needs, we recommend that meetings with industry leaders are broken out into Advanced Manufacturing and High Tech because they often require different workforce skills and site/building needs (e.g. software desires a downtown location and manufacturing needs larger buildings and sites). When collaborating with existing industries to understand barriers to growth it is helpful to keep similar interests aligned in meetings to find consistent needs and foster networking amongst businesses.

Additionally, the Agriculture industry is specifically identified due to its legacy within the region and need for ongoing development. The region recognizes this industry and its importance, and generally assumes it is acknowledged with in the Manufacturing Fermentation and Value-Added Agriculture cluster. Our stakeholder meetings identified that Agriculture should be distinctly recognized. Furthermore, due to the different needs between the two industries, it is appropriate to distinguish the two for business retention and expansion efforts.

ASSESSMENT OF COMMUNITY ECONOMIC DEVELOPMENT POTENTIAL

The following key themes emerged as important topics amongst stakeholders or were identified through research as unique assets to the region that should be noted. A SWOT analysis provides additional summary of these themes. In sum, The Dalles is well positioned to support a growing, sustainable, and diversified economy within the Gorge. As identified in Attachment A, the region’s traded-sector industries promise employment growth and strong wages. Continued collaboration to support these existing businesses will ensure projected employment growth and opportunity for local residents.

Strong Infrastructure – As evidenced by the Google data center investment, The Dalles is fortunate to have strong broadband and electrical power infrastructure that is provided through non-carbon emitting hydro-power. These assets are significant and should be promoted to encourage continued business investment.

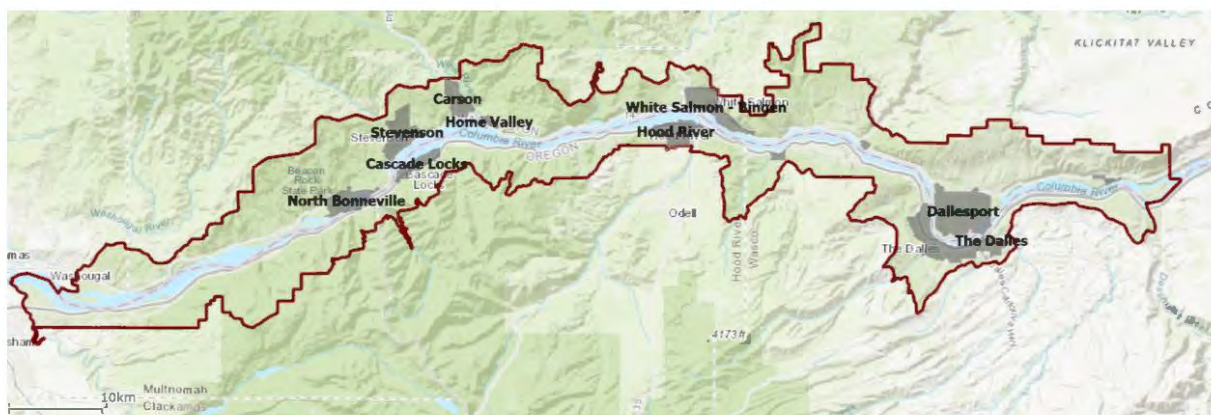
Columbia Gorge Regional Airport Business Park – The City of Dalles, Oregon and Klickitat County, Washington jointly own this 994-acre facility located in unincorporated Dallesport, Washington that is regulated by the Federal Aviation Administration (FAA). The airport is surrounded by a 90-acre business park, which consists of 30 acres that have been platted with 1 – 7 acre lots and currently served with utilities and roads. Some of the parcels must be used for aviation related purposes but

others can be used for general industrial purposes. The property must be leased, however in talking to commercial brokers in the Portland region this is an accepted practice and should not be considered a barrier to investment. Sage Tech, a significant advanced manufacturer for the UAS industry, just located their new facility approximately ½ mile west of the business park suggesting interest in future investment within the UAS industry. Despite the recent financial challenges facing Sage Tech, their investment in this location indicates advanced manufacturers recognize this area to work well for their industry needs. The Park could help serve the anticipated manufacturing growth as defined in Figure 7.

STEM Hub – Science Technology Engineering Math (STEM) is a critical foundation for K-12 education across the country. These are the critical skills students must learn for opportunities in the future workplace. The Columbia Gorge STEM Hub is a relatively new state organization but is already having a strong impact. It was recently awarded the competitive US 2020 STEM coalition grant largely due to the Maker Space in The Dalles Library through significant investment and collaboration with local high-tech industry leaders. The Maker Space is an innovation space for the public to create prototype industrial designs utilizing 3D printers and laser-cutters and hands-on design support and collaboration.

Pendleton UAS Range (PUR) - PUR is a partner test site within the University of Alaska Fairbanks (UAF) led Pan-Pacific UAS Test Range Complex: one of only seven [FAA permitted UAS Test Sites](#) in the country. This facility is located approximately 125 east of The Dalles along Interstate 84. PUR is an important element in growing the UAS industry cluster. Continued collaboration, support and promotion of the facility on an ongoing basis is encouraged. The PUR director indicated that several out-of-state companies utilize the test range and may want a second location near the facility. Having a relationship with The Dalles will allow them to promote additional office/industrial sites to out of state investors. Future outreach to the Warm Springs UAS Range, which has more limited service offerings, should be considered as well.

Columbia Gorge National Scenic Area (NSA) – This is a unique federal designation that pertains to both states of Oregon and Washington. The intent of the NSA is to protect and provide for the enhancement of the scenic, cultural, recreational and natural resources of the Gorge; and to protect and support the economy of the Columbia River Gorge area by encouraging growth to occur in existing urban areas (shaded gray on the maps) and thereby allowing future economic development to occur.



Industry leaders conveyed that the Gorge and surrounding recreation is a huge asset for talent attraction. The scenic area serves to protect a significant asset, but must be balanced with the need for growth. Stakeholders noted that the Gorge Commission views the NSA urban areas holistically (not by state boundaries) and agreed that this regional perspective is appropriate as the two areas complement each other through various services, housing and job opportunities that benefit workers and employers on both sides of the river. Therefore, if The Dalles seeks to expand the NSA defined urban area, it is helpful to show why the Dallesport urban area, which is largely vacant, does not meet current economic development needs. Continued efforts to promote industry growth in Columbia Gorge Regional Airport Business Park can help define barriers to growth within the Dallesport area and may ultimately support future efforts to expand The Dalles boundary.

Micropolitan Area - The Dalles is a micropolitan area, which is a community that contains an urban core of at least 10,000, but less than 50,000, population as defined by U.S. Office of Management and Budget (OMB). This is important distinction for some stakeholders that accurately noted the city is not rural. It contains many important services such as the hospital, community college and regional services. Due to this position, employment rate in the city is growing more quickly than county rate. This aligns with national trends and is expected to continue.

Strengths, Weaknesses, Opportunities, and Threats

The following strengths, weaknesses, opportunities, and threats (SWOT) are derived from stakeholder input, survey responses, and general research. This is a helpful tool to quickly convey a visual “story” of opportunities and barriers to economic growth within The Dalles.

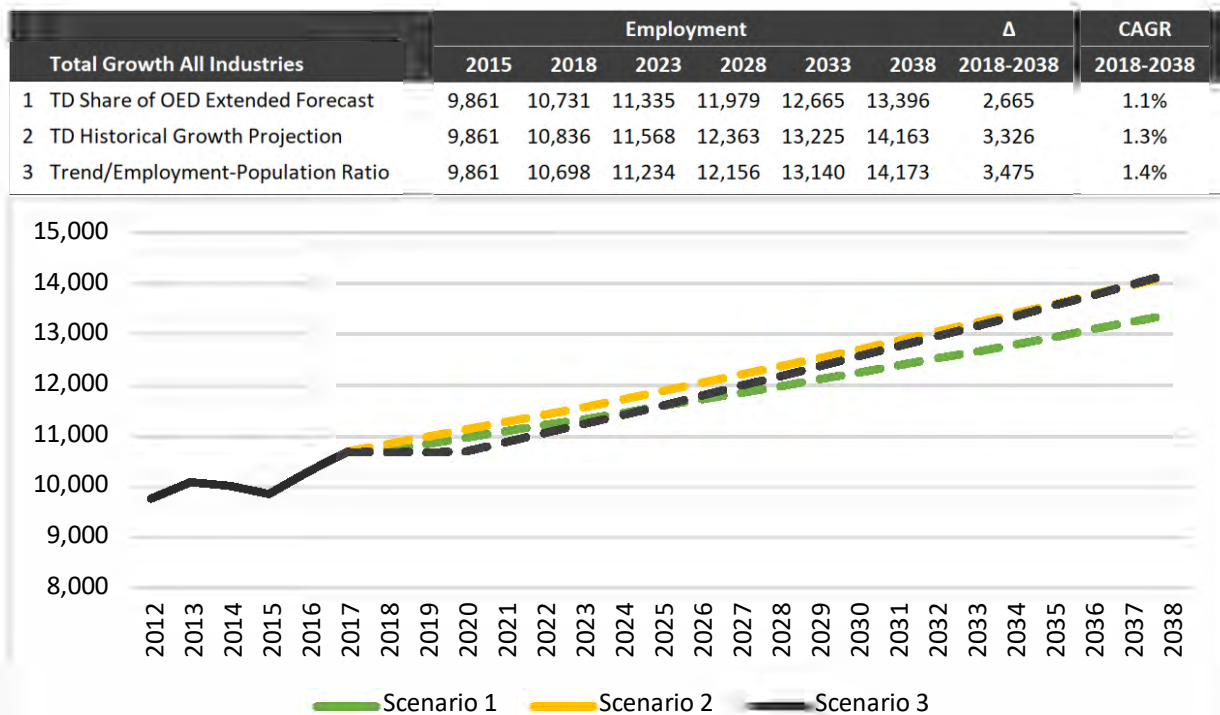
Strength	Weakness
<ul style="list-style-type: none"> • Diverse and Growing Clusters • Employment Growth • Broadband • Utilities • The Gorge • Access to outdoor recreation • Strong downtown form 	<ul style="list-style-type: none"> • Limited population/workforce growth • University presence • Limited housing availability and cost • Community property maintenance/appearance
Opportunity	Threat
<ul style="list-style-type: none"> • Portland growth and expense • Airport business park • Existing community can increase asset wealth and opportunity • CGCC • Downtown investment opportunities 	<ul style="list-style-type: none"> • Weak workforce skills • Inability to grow population • Increased costs with population growth • Resistance to higher density residential infill development • Developable land supply constraint

THE DALLES EMPLOYMENT AND LAND DEMAND FORECAST

Employment Projection Summary

Bridge ED estimated three alternate employment forecasts resulting in a range of potential growth scenarios. Figure 23 summarizes the total employment growth estimated under each of the three scenarios. The first scenario extends the Oregon Employment Department (OED) 2017-2027 regional forecast. The second scenario applies The Dalles employment growth rates experienced between 2012-2017 to future growth. The third scenario assumes Wasco County will experience higher employment to population ratios in the future and that The Dalles will capture a greater share of Wasco County employment. The scenarios and their methodologies are explained in greater detail in the sections below.

Figure 23: Employment Projections under 3 Methodologies for The Dalles (2018-2038)¹³



Source: Oregon Employment Department QCEW, Bridge Economic Development

20-Year Employment Projections & Methodology

Scenario 1 is based on OED's 2017-2027 regional employment forecast for Gilliam, Hood River, Sherman, Wasco and Wheeler Counties which is summarized in Figure 24. . Also listed is the estimated regional share of Hood River and Wasco Counties employment for 2017. The two counties

¹³ Note that Scenario 1 and Scenario 3 are compliant with Goal 14 Safe Harbor rules.

account for approximately 91% of total employment in the region although shares vary across industries.

Scenario 1 Methodology

- A. Assuming Hood River and Wasco Counties' share of regional employment remains fixed, we estimated their share of employment in 2027. (See Figure 24)
- B. Based on Hood River/Wasco Counties share of regional employment, we estimated their annual growth rates by industry through 2027. (See Figure 24)
- C. Annual growth rates by industry for Hood River/Wasco Counties were extended through 2038 and applied to The Dalles estimated employment growth by industry between 2018 and 2038. (See Figure 25)

Figure 24: Scenario 1. Oregon Employment Department (OED) Regional Forecast (2017-2027)

	2017		Emp. Share	2027		Growth Rate**
	Region*	Hood River/Wasco	Hood River/Wasco	Region*	Hood River/Wasco	Hood River/Wasco
Natural Resources & Mining	4,520	4,191	92.7%	4,790	4,441	0.6%
Construction	870	785	90.2%	1,030	929	1.7%
Manufacturing	2,500	2,453	98.1%	2,800	2,747	1.1%
Wholesale Trade	640	579	90.5%	710	642	1.0%
Retail Trade	3,340	3,185	95.4%	3,590	3,423	0.7%
Trade, Transportation & Utilities	580	362	62.4%	650	406	1.1%
Information	340	331	97.4%	350	341	0.3%
Financial Activities	520	487	93.7%	540	506	0.4%
Professional & Business Services	1,820	1,597	87.7%	2,120	1,860	1.5%
Education & Health Services	4,070	3,777	92.8%	4,740	4,399	1.5%
Leisure & Hospitality	3,890	3,693	94.9%	4,410	4,187	1.3%
Other Services	1,000	944	94.4%	1,120	1,057	1.1%
Government	4,120	3,407	82.7%	4,300	3,556	0.4%
Total	28,210	25,791	91.4%	31,150	28,495	1.0%

*OED Region includes Gilliam, Hood River, Sherman, Wasco, and Wheeler Counties

**Growth rate applied to TD employment projections in Scenario 1.

*OED Region includes Gilliam, Hood River, Sherman, Wasco, and Wheeler Counties

**Growth rate applied to TD employment projections in Scenario 1.

Source: OED Regional Employment Projections

Under Scenario 1, The Dalles is expected to grow by 1.1% annually through 2038 and add 2,665 employees. One drawback to Scenario 1 is that projected growth in The Dalles is limited to regional industry growth projections which may not accurately represent industry potential in The Dalles. While Hood River and Wasco Counties account for the majority of employment in the region, it is difficult to parse out how the other three counties may be impacting OED's estimates of future growth potential in the region and therefore what expected growth rates are more representative for Hood River County, Wasco County and The Dalles.

Figure 25: Scenario 1. The Dalles Share of OED Extended Forecast (2018-2038)

TD Share of OED Extended Forecast Industry Sector	Employment						Δ	CAGR
	2015	2018	2023	2028	2033	2038	2018-2038	2018-2038
Natural Resources & Mining	1,137	1,420	1,462	1,505	1,549	1,595	175	0.6%
Construction	338	410	446	485	528	575	165	1.7%
Manufacturing	718	865	915	969	1,025	1,085	220	1.1%
Wholesale Trade	85	88	93	98	103	109	20	1.0%
Retail Trade	1,539	1,680	1,741	1,805	1,872	1,940	261	0.7%
Transportation, Warehousing & Utilities	345	360	381	404	427	452	92	1.1%
Information	227	177	180	182	185	187	11	0.3%
Financial Activities	284	287	292	298	304	309	23	0.4%
Professional & Business Services	460	524	565	610	658	711	187	1.5%
Education & Health Services	2,824	2,861	3,088	3,332	3,596	3,881	1,020	1.5%
Leisure & Hospitality	1,137	1,230	1,310	1,395	1,485	1,581	351	1.3%
Other Services	372	409	433	458	485	513	104	1.1%
Government	395	420	429	438	447	457	37	0.4%
Total	9,861	10,731	11,335	11,979	12,665	13,396	2,665	1.1%

Source: OED QCEW and Bridge ED

Scenario 2 is based on OED QCEW employment data for The Dalles between 2012-2017 during which time The Dalles grew by 1.8% annually and added 925 employees. Growth rates during 2012-2017 by industry sector are listed in Figure 26.

Scenario 2 Methodology

- A. Historical (2012-2017) annual growth rates by industry are applied to future growth after adjusting to account for volatility apparent when forecasting based on a 5-year range.
- B. Adjustments to annual growth rates were made using OED's regional employment forecast as well as industry sector trends observed within The Dalles and its employment shed. Adjusted rates are listed in Figure 26.

Figure 26: Scenario 2. Adjusted Annual Growth Rates

The Dalles Industry Growth (2012-2017)	Actual AAGR	Adjusted AAGR*
Agriculture, forestry, fishing and hunting	0.4%	0.6%
Mining, quarrying, and oil and gas extraction	7.6%	0.7%
Utilities	6.3%	2.3%
Construction	2.6%	2.1%
Manufacturing	6.2%	1.7%
Wholesale trade	-2.3%	0.8%
Retail trade	-0.1%	0.6%
Transportation and warehousing	1.0%	1.0%
Information	16.3%	0.4%
Finance and insurance	-4.3%	0.3%
Real estate and rental and leasing	-2.4%	0.3%
Professional, scientific, and technical services	-7.7%	1.2%
Management of companies and enterprises	-0.4%	0.8%
Admin. support, waste mgmt & remediation services	4.6%	1.8%
Educational services	-0.4%	0.8%
Health care and social assistance	3.9%	1.8%
Arts, entertainment, and recreation	2.2%	2.2%
Accommodation and food services	4.3%	1.9%
Other services	5.8%	2.3%
Government	-6.3%	0.3%

*Adjustments made based on historical County growth & OED Employment Forecast

**Adjustments made based on historical County growth & OED Employment Forecast*

Source: OED QCEW and Bridge ED

Under Scenario 2, The Dalles is expected to grow by 1.3% annually through 2038 and add 3,326 employees. One aspect to consider with Scenario 2 is that to a certain extent, the adjusted annual growth rates applied to projected employment growth are subjective.¹⁴ While based on trends and OED employment forecasts, finding the accurate and plausible “in the middle” rate is challenging. An attempt to conservatively take into consideration The Dalles’s higher short-term growth and OED’s

¹⁴ Subjectivity is endemic to the nature of forecasting. Using subjectivity in forecasting can be a powerful tool when combined with data and statistical analysis. Because the foundation of a forecast is so heavily based on past historical data (and subject to errors of collection and reporting, etc.), the process of ground-truthing in terms of comprehensive qualitative research gives a researcher the subjective tools to understand how the data fits into the real world. Subjective skills of synthesizing many sources of data are particularly important when analyzing only a few years of data, such as is the case with The Dalles. In addition, combining the objective and subjective methods of analysis is an important element of the Goal 9 process. The inclusion of community input and the consideration of community aspirations that are reasonably within the community’s economic development potential are required pieces of an Economic Opportunity Analysis and should be used as a basis for including subjective analysis. Please see:

<https://secure.sos.state.or.us/oard/displayDivisionRules.action?selectedDivision=3059>;

https://www.oregon.gov/lcd/OP/Documents/goal9guidebook_without_cover.pdf;

https://www.oregon.gov/lcd/UP/Documents/tips_for_cond_econ_opp_analysis.pdf

Dressler, Fritz R.S. "Subjective methodology in forecasting." Technological Forecasting and Social Change, vol 3, 1971, p. 427-439, [https://doi.org/10.1016/S0040-1625\(71\)80030-6](https://doi.org/10.1016/S0040-1625(71)80030-6).

Flores, B. E. and White, E. M. "Subjective versus objective combining of forecasts: An experiment." J. Forecast. 8 1989, p. 331-341. doi:10.1002/for.3980080314.

lower regional long-term forecast as well as Bridge ED's assessment of long-term growth potential in The Dalles guided rate adjustments.

Figure 27: Scenario 2. The Dalles Historical Growth Projection

TD Historical Growth Projection Industry Sector Sector	Employment						Δ	CAGR
	2015	2018	2023	2028	2033	2038	2018-2038	2018-2038
Natural Resources & Mining	1,137	1,460	1,507	1,556	1,606	1,657	197	0.6%
Construction	338	384	425	471	522	578	194	2.1%
Manufacturing	718	916	997	1,086	1,182	1,286	370	1.7%
Wholesale Trade	85	91	95	99	103	107	16	0.8%
Retail Trade	1,539	1,634	1,682	1,732	1,782	1,835	200	0.6%
Transportation, Warehousing & Utilities	345	372	405	441	481	525	152	1.7%
Information	227	195	199	203	208	213	18	0.4%
Financial Activities	284	268	272	276	280	284	17	0.3%
Professional & Business Services	460	485	522	562	606	652	167	1.5%
Education & Health Services	2,824	2,978	3,230	3,505	3,805	4,132	1,154	1.7%
Leisure & Hospitality	1,137	1,247	1,372	1,508	1,659	1,824	576	1.9%
Other Services	372	416	466	522	584	653	237	2.3%
Government	395	389	396	403	410	417	28	0.3%
Total	9,861	10,836	11,568	12,363	13,225	14,163	3,326	1.3%

Source: OED QCEW and Bridge ED

Scenario 3 is based on both Wasco County's ratio of employment to population as well as The Dalles's share of Wasco County employment. Figure 28 shows current and projected population in Wasco County (and for comparison, Hood River and Sherman Counties). Current population estimates and population forecasts are estimated by the Portland State University's Population Research Center. Also shown is Wasco County and The Dalles current and projected employment. Current employment is estimated by OED.

Scenario 3 Methodology

- A. Wasco County's employment/population ratio is projected to increase at an annual rate of 0.7% through 2040 at which time it reaches 51.0%. Given Hood River County's employment/population ratio of 53.6% as of 2015, it is likely that Wasco County will follow a similar trajectory over time.¹⁵
- B. The Dalles's share of Wasco County employment is projected to increase by 0.1% annually through 2040 at which time it approaches 90%. Given the current trajectory where The Dalles's share of Wasco County has increased from 73% in 2006 to 87% in 2015 as well as national trends toward increased urbanization, it is likely that The Dalles will continue to capture a greater share of County employment during the next 20 years.

¹⁵ Between 2005 and 2012, the employment to population ratio in Wasco County averaged a 1.5% increase annually. Our forecast takes a more conservative approach to the forecasted ratio through 2040 assuming a continued but lower (0.7%) increase in employment to population as workers continue to return to the labor market and Wasco County's labor force increases.

- C. In Scenario 3, total employment is estimated and then distributed by industry sector based on current industry sector shares and OED industry growth projections.

Figure 28: Scenario 3. Employment/Population Ratios

	2012	2015	2020	2025	2030	2035	2040
Population	PSU Estimates		PSU PRC Population Forecast				
Hood River	22,875	24,245	25,810	27,442	29,014	30,538	32,045
Sherman	1,765	1,790	1,816	1,836	1,844	1,842	1,834
Wasco	25,485	26,370	27,497	28,653	29,798	30,928	32,029
Employment	OED Estimates		OED/BridgeED Estimates				
Hood River	12,588	12,997					
Sherman	738	832					
Wasco	11,157	11,304	12,205	13,170	14,182	15,243	16,346
The Dalles	9,772	9,861	10,701	11,604	12,559	13,565	14,620
Employment/Population Ratio			Assume Wasco County Employment/Population Ratio Increases				
Hood River	55.0%	53.6%					
Sherman	41.8%	46.5%					
Wasco	43.8%	42.9%	44.4%	46.0%	47.6%	49.3%	51.0%
The Dalles Share of Wasco County Employment			Assume increased urbanization drives TD share of Wasco County employment				
The Dalles	87.6%	87.2%	87.7%	88.1%	88.6%	89.0%	89.4%

Source: PSU Population Research Center, OED QCEW and Bridge ED.

Under Scenario 3, The Dalles is expected to grow by 1.4% annually through 2038 and add 3,475 employees. One caveat for Scenario 3 is that growth between industries is likely not representative as all industries are projected to grow at relatively similar rates.¹⁶

¹⁶ This caveat refers to the dynamism in growth between industries that is allowed in the forecasts in Scenario 1 and Scenario 2. Scenario 3 uses industry shares as of 2017 and assumes that industry shares remain constant through the forecast period. While industries will likely experience some shifts in total employment share over the twenty-year period, due to general economic diversity in The Dalles, employment shares between industries are unlikely to shift dramatically. This is a common approach to Goal 9 forecasting. Please see: https://www.oregon.gov/lcd/OP/Documents/goal9guidebook_without_cover.pdf

Figure 29: Scenario 3. The Dalles Employment/Population Ratio Forecast

Trend/Employment-Population Ratio Industry Sector	Employment						Δ	CAGR
	2015	2018	2023	2028	2033	2038	2018-2038	2018-2038
Natural Resources & Mining	1137	1451	1501	1583	1711	1845	394	1.2%
Construction	338	376	402	448	484	522	146	1.7%
Manufacturing	718	901	947	1027	1110	1197	296	1.4%
Wholesale Trade	85	90	94	102	110	119	29	1.4%
Retail Trade	1539	1625	1688	1792	1937	2089	464	1.3%
Transportation, Warehousing & Utilities	345	366	385	417	451	486	120	1.4%
Information	227	194	199	207	223	241	47	1.1%
Financial Activities	284	267	277	294	317	342	75	1.3%
Professional & Business Services	460	478	505	552	596	643	165	1.5%
Education & Health Services	2824	2930	3117	3445	3724	4017	1,087	1.6%
Leisure & Hospitality	1137	1224	1292	1409	1523	1642	418	1.5%
Other Services	372	407	428	464	501	541	134	1.4%
Government	395	388	399	418	452	487	99	1.1%
Total	9,861	10,698	11,234	12,156	13,140	14,173	3,475	1.4%

Source: OED QCEW and Bridge ED

Identification of Required Site Types

The land demand forecast extends the employment forecast to estimate the demand for employment land. Figure 30 shows land demand under the three employment growth scenarios.

1. We estimate the amount of projected total square footage needed to accommodate future employment by assuming standard square feet per employee by employment land type. While we convert total square footage needed into gross acres, note that it is possible and perhaps preferable for The Dalles to accommodate certain types of future employment growth as infill within its downtown and other built areas, thereby reducing the number of gross acres demanded.
2. Total square feet per employee is converted into gross acres by assuming standard floor area ratios by employment land type. Other assumptions used in the conversion include:
 - a. We assume that a certain proportion of new employment will be expansions/hiring by existing companies that will not require site expansion. We have assumed 10% for industrial users, 15% for commercial/office users and 35% for commercial/retail users.
 - b. We assume a percentage "gross up" due to infrastructure, setbacks, etc. For industrial sites, we assume 15% and for commercial (office & retail) users, we assume 20%.

Figure 30: The Dalles Land Demand Forecast (2018-2038)

Scenario 1	Employment Land	New Employment	Sq.Ft./Employee	Total SF Needed	Floor Area Ratio*	Gross Acres Needed	Net Buildable Acres
Scenario 1	Industrial	672	750	503,967	0.15	81.7	69.4
	Office	350	250	87,530	0.30	7.1	5.7
	Retail	235	350	82,166	0.25	6.1	4.9
	Accommodation/Food	351	300	105,263	0.50	3.9	3.1
	Institutional	1,057	750	792,795	0.30	64.5	51.6
	Total	2,665		1,571,722		163.3	134.7
Scenario 2	Employment Land	New Employment	Sq.Ft./Employee	Total SF Needed	Floor Area Ratio*	Gross Acres Needed	Net Buildable Acres
Scenario 2	Industrial	929	750	697,042	0.15	113.0	96.0
	Office	459	250	114,711	0.30	9.3	7.5
	Retail	180	350	63,077	0.25	4.7	3.8
	Accommodation/Food	576	300	172,883	0.50	6.4	5.2
	Institutional	1,182	750	886,259	0.30	72.1	57.6
	Total	3,326		1,933,973		205.5	170.0
Scenario 3	Employment Land	New Employment	Sq.Ft./Employee	Total SF Needed	Floor Area Ratio*	Gross Acres Needed	Net Buildable Acres
Scenario 3	Industrial	985	750	739,090	0.15	119.8	101.8
	Office	468	250	116,963	0.30	9.5	7.6
	Retail	418	350	146,228	0.25	10.9	8.7
	Accommodation/Food	418	300	125,459	0.50	4.7	3.7
	Institutional	1,186	750	889,446	0.30	72.3	57.9
	Total	3,475		2,017,186		217.2	179.7

*Floor Area Ratio (FAR) is the ratio of total usable building area relative to the total area of the site. It allows a consideration of the entire floor area of a building as opposed to its footprint.

Source: OED QCEW and Bridge ED

ACTION PLAN GOALS AND OBJECTIVES

Based on the above analysis, the following Goals and Objectives provide the foundation for the final actions that will be implemented by city staff.

Goal 1: Expand the Existing Industry Base

Why this Goal?

Expanding the economic base beyond the local sector industry is critical to sustain the health of The Dalles. As existing traded sector companies expand and scale up, often existing employees spin-off new companies that allows for diversification in addition to expansion. Diversification provides alternative job opportunities with middle-income wages, as well as a more resilient economy that is not dependent on one large employer. Attracting new businesses is challenging and even more so in smaller communities. Therefore, the most efficient way to grow the economic base is to support existing companies by understanding their barriers to growth and talent needs. Additionally, companies that start in a community are more likely to stay and grow there.

Objective 1.1: Identify an Economic Development Champion

In order to implement the Economic Development Strategy, the city should have a designated staff person that will be the full-time champion for economic development. This person must work with economic development partners to build relationships with existing businesses, monitor the strategy

implementation, and build relationships across several municipal departments in order to leverage opportunities for infrastructure investment and other identified programs. Without an identified champion, the final Action Plan is likely to sit on a shelf. This is an appropriate position for the city as the following similar size communities have at least one FTE in this position.

- Canby (17,300) 2 (Director and ED Coordinator)
- Dallas (15,400) 1 Director
- La Grande (13,000) 1 Director

Objective 1.2: Engage with Industry Clusters and Define Needs

Businesses tied to similar industries should be convened to discuss what they need to grow. Focused meetings, in collaboration with economic development partners, such as these build collaboration and foster cross-pollination of opportunities and ideas. In addition, the meetings result in specific action items necessary to address business growth needs. Community partners can then effectively work to remove barriers and provide meaningful support to businesses.

Objective 1.3: Make Employment Areas Desired by Industry Clusters Shovel Ready

It is important to understand where different industries can locate (e.g. generally software companies desire a walkable mixed-use location and manufacturing facilities needs larger buildings and sites with highway access). With this understanding of site needs, the appropriate infrastructure improvements can be made in the right locations to foster growth. This includes broadband, storm water, and transit in addition to roads, sewer, and water. City partners have the unique role in executing the development of public infrastructure investments, land use policy, and the permitting process. Removing barriers to site development and proactively fostering site readiness tied to business needs is a critical role in economic development for all partners to undertake. At the same time, it is important to leverage and promote the exceptional broadband and electrical power infrastructure that is provided through non-carbon emitting hydro-power.

Objective 1.4 Enhance the Startup Ecosystem

New businesses account for nearly all net new job creation and almost 20 percent of gross job creation. Furthermore, companies less than one-year-old have created an average of 1.5 million jobs per year over the past three decades¹⁷. People generally start businesses in the places they are already located, and many of the resources they access are at the local or regional level. New traded sector startups generally stem from university research or an existing industry cluster. These new businesses have limited space needs and may just be starting out of the home or garage. These businesses need exposure to capital and industry networks for collaboration and support. It is important to support an ecosystem where startups are supported and celebrated to create new jobs.

¹⁷ The Importance of Young Firms for Economic Growth, Kaufman Foundation, September 13, 2015

Goal 2: Grow and Attract Talent

Why this Goal?

Complex issues driving income stratification and workforce skills gaps are making it more difficult for all residents to realize positive personal economic growth in keeping with business growth. To plan for this modern economy, communities must consciously foster a resilient economy that is derived from a diverse industry base and skilled workforce to weather inevitable negative portions of economic cycles. At the same time fast growing high-wage jobs within the region are struggling to find talent that will support their growth. In order to address this immediate opportunity, talent should be recruited in the short term while continuing to strengthen the local talent pipeline infrastructure.

Objective 2.1 Build Diverse Types of Housing

A consistent message from the community was the lack of diverse housing types, especially for high-wage earners. Interviews with real estate brokers suggest that housing developers are choosing to build in Hood River as the return-on-investment (ROI) is higher considering the marginal difference in land costs and construction costs between the two cities. This limited housing supply is a barrier to easily attracting new talent. Furthermore, a limited option on housing types is forcing some people to “buy-down” and occupy homes that would otherwise be available for lower-income residents.

Objective 2.2 Prepare Youth for Economic Opportunity

Educational attainment is one of the significant determining factors in determining income growth and access to career pathways. Working with local partners to engage youth early regarding career opportunities is a critical component in high school graduation success rates and preparation for higher education. Research has demonstrated that access to quality Career Connected Learning (CCL) programs such as Gorge Works increases graduation rates and enrollment in postsecondary certification, credential, and degree programs. For this objective to succeed, both business and education leaders must be committed to its success.

Objective 2.3 Attract Talent

Talent is the number one asset and driver for business in deciding where to expand and grow. A community that easily attracts talent has a significant competitive advantage for business. As identified by community stakeholders, the region is not focused on attracting emerging talent. Intentional efforts to counter this perception and build networks to lower barriers to entry into the community, business, and social networks is important.

Goal 3: Create Place

Why this Goal?

People of all ages desire access to a dynamic lifestyle with housing, restaurants, entertainment, and retail nearby within downtown cores. This lifestyle does not mean that an entire community must

conform to urban densities. What is important is that some element of an urban lifestyle and livable community through a healthy Main Street, traditional downtown or town centers in suburbs is provided. Such areas are important for employers to be able to attract and keep talent. It is important for The Dalles to define and actively grow the downtown unique to their values.

Objective 3.1 Complete and Implement the Downtown Plan

New local sector businesses are important as they make a community distinct and provide amenities to attract emerging professionals and families that drive the new economy. The Dalles needs to finalize a downtown plan to guide actions that will attract amenities such as recreation services, retail, and restaurants.

Objective 3.2 Celebrate The Dalles

In retaining/recruiting talent and companies, it is important to convey how The Dalles is a unique place defined by distinct assets. For example, many younger residents are drawn to the agriculture and manufacturing roots of a “maker” community that embraces innovation. At the same time, some of the “dirty” elements as reported in the Oregonian on March 1, 2019 perpetuate a negative image of the community that may present a barrier to potential investment. Defining a consistent message of what authentically sets the community apart, aligned with specific actions the city will take to implement the desired community image for The Dalles, helps convey to businesses, and their future employees, why they should stay and grow here.

Objective 3.3 Support Local Retailers and Expand the Market

The Dalles is the regional hub for the five-county region and is experiencing a growing interest from Portland investors. Retail in The Dalles generally serves people on a daily basis and provides needed basic services. At the same time, residents want amenities such as restaurants and community gathering places with families. Understanding the city’s retail niche as well as missed opportunities for additional amenities serving local residents is important. Outreach to existing business in the Portland market is a viable strategy as these businesses are often looking for new markets. At the same time, it is important to cultivate opportunities for local residents. Many of these businesses need “brick-and-mortar” locations often requiring tenant improvements and building permits, which is a process they may have never encountered as opposed to more experienced developers. These businesses often benefit greatly from business planning and consulting as well. For these business owners, having one point of contact at the jurisdiction to navigate the process of starting a new business is extremely valuable.

Objective 3.4 Promote the Gorge and Enhance Access to Outdoors

The Columbia River Gorge is one of the most remarkable and unique natural areas in the country. It hosts renown recreation opportunities that include windsurfing along the Columbia River and cycling on the roads around The Dalles. It enables farm-fresh dining and local wineries that thrive along the sunnier eastern hills. This remarkable place attracted and retained Insitu, and according to interviews with another UAS company CEO it is critical element in attracting talent. The city can work with

community partners to improve and help market recreation amenities tied to the Gorge to continue making The Dalles a unique and exceptional community.

End of Document

ATTACHMENT A

ATTACHMENT B

THE DALLES ECONOMIC DEVELOPMENT ACTION PLAN (2019 TO 2024)									
Actions	2019	2020	2021	Year 4&5	Lead Org/ Staff	City Staff Support	Partners	Resource Required	Deliverable
GOAL 1: EXPAND THE EXISTING INDUSTRY BASE									
Objective 1.1 Identify an Economic Development Champion									
Outcome: Identified actions are implemented									
A. Hire staff person to implement Action Plan	X				Community Development Director (CDD)	City Manager Office	None	Budget for one FTE	<ul style="list-style-type: none"> Approval for staff position. 2Q 2020 Post position and recruit. 3Q 2020 Position filled. 1Q 2021
B. Collaborate with MCEDD and other stakeholders to review Action Plan and coordinate activities			X	X	NEW FTE	Community Development Director (CDD)	MCEDD, CGCC, Port Wasco County EDC, SBDC, Chamber	Staff time	<ul style="list-style-type: none"> Create list of targeted companies within industry clusters to visit. 3Q 2021 10 meetings a year (generally 1 per month). Annually Document barriers/opportunities and quotes from CEO (for marketing purposes) in a database. Annually Review Action Plan outcomes with report to Council. 4Q each year.
Objective 1.2 Engage with Industry Clusters and Define Needs									
Outcome: Understand where to best invest time and resources to support businesses									
A. Engage with existing organizations to determine barriers to address at city and foster collaboration		X	X	X	NEW FTE	Community Development Director (CDD)	CGCC, Gorge Tech Alliance (GTA), Gorge Works, Chamber, STEM Hub, K-12, SBDC, Port	Staff time	<ul style="list-style-type: none"> Attend partner meetings and foster collaboration. Annually Determine how city can support and promote CGCC development of test kitchen and certificate program. 4Q 2020.
B. Collaborate with GTA and MCEDD to foster alignment and industry promotion of Pendleton and Warm Springs UAS facilities		X	X	X	NEW FTE	Community Development Director (CDD)	MCEDD, UAS Ranges, GTA, Business Oregon	Staff time	<ul style="list-style-type: none"> Meet with Pendleton UAS to foster relationship and understanding of UAS assets to better understand UAS industry opportunities. Annually Align information with Action 1.3.B. Annually
C. Align downtown urban renewal plan and visioning with ED Action Plan		X	X		Community Development Director (CDD)	NEW FTE	Utility Providers, Public Works, Urban Renewal, Main Street	Staff time	<ul style="list-style-type: none"> Align company needs and interests with downtown projects. 3Q 2020 Outline a list of necessary public investments to foster private investment that addresses businesses' needs. 2Q 2021
Objective 1.3 Make Employment Areas Desired by Industry Clusters Shovel Ready									
Outcome: Foster regional growth of industry clusters									
A. Prepare a land supply analysis in alignment with EOA requirements	X	X			Community Development Director (CDD)	NEW FTE	Port, MCEDD, Business Oregon, Wasco County Planning Director	\$25,000 (unless grant secured)	<ul style="list-style-type: none"> Secure grant to fund project. 3Q 2019 Complete supply analysis. 2Q 2020
B. Prepare an inventory of sites and buildings that clearly define and highlight the infrastructure and incentive assets within the city			X	X	NEW FTE	Community Development Director (CDD)	MCEDD, Business Oregon, Public Works, Utility Providers, Port, Airport Business Park	Staff time	<ul style="list-style-type: none"> Identify underutilized industrial properties that can be redeveloped at higher densities. 4Q 2020 Based on information derived in 1.1.B, document where certain industry wants to expand. 1Q 2021 Determine if local improvement districts (LID) are desired to help secure grants that will finance any necessary infrastructure improvement to make sites "shovel ready" 1Q 2021 Develop a list of sites and buildings that corresponds with industry desires and incentive opportunities. 1Q 2021 Maintain and update list. Annually

C. Promote a proactive permitting process and culture		X	X	X	Community Development Director (CDD)	Public Works, Planning, City Manager, NEW FTE	Public Works, County Building/Fire, Planning	Staff time	<ul style="list-style-type: none"> Create a “SWAT team” of key staff from each partner to collaborate on site or building development needs. Share intent of ED Strategy and Action Plan. 1Q 2021 Meet quarterly to discuss infrastructure investments or proactively address barriers. Annually SWAT team convened for immediate opportunities. Annually.
D. Actively promote Columbia Gorge Regional Airport Business Park, which is within an Opportunity Zone.			X	X	Airport Manager	NEW FTE	Pendleton UAS, GTA	Staff time and \$15,000 for marketing materials	<ul style="list-style-type: none"> Based on meetings with industry clusters, determine potential users/tenants. 1Q 2021 Prepare marketing materials with available sites, lease rates, OZ opportunity for businesses and recent siting of Sage Tech by 4Q 2021. Meet with Portland industrial developers and brokers by 1Q 2022. Collaborate with Pendleton UAS to inform companies testing at site of location opportunities at the Business Park to grow the regional UAS cluster. Annually
Objective 1.4 Enhance the Startup Ecosystem									
Outcome: Foster regional growth of industry clusters									
A. Continue to invest in and promote maker space collaboration		X	X	X	NEW FTE	Library/Makers Space	STEM HUB, GTA, K-12 School District, MCEDD	Staff time. Urban renewal allocation.	<ul style="list-style-type: none"> If it does not exist, create a Maker Space stakeholder group to determine alignment and foster initiatives. 4Q 2020 Work with Maker Space to determine if local crafter space is appropriate in downtown. 1Q 2021
B. Support, sponsor and promote startup collaboration networking events downtown		X	X	X	NEW FTE	Library/Makers Space	Chamber, GTA, SBDC, MCEDD	Staff time	<ul style="list-style-type: none"> Determine why Pub Talks are no longer happening. 4Q 2020. If Pub Talks or Pitch events desired, determine who will lead. 2Q 2021 City revisits home business license/permit process to encourage flex space and opportunity for entrepreneurs. 1Q 2021 Determine how Latino population can be best engaged in start-up activities. 2Q 2021 Leverage MCEDD’s micro-loan program to support start-ups and if appropriate for city to help seed. 4Q 2021

GOAL 2: GROW AND ATTRACT TALENT

Actions	2019	2020	2021	Year 4&5	Lead Org/ Staff	City Staff Support	External Partners	Resource Required	Deliverable
Objective 2.1: Build Diverse Types of Housing									
Outcome: Helps attract and retain talent									
A. Encourage affordable and diverse housing types for a variety of residents.	X	X			Community Development Director (CDD)	Planning	CGCC	Staff time	<ul style="list-style-type: none"> City consider if it will reduce or defer SDC's or permit fees to encourage affordable housing. Q1 2021 Continue to support CGCC Campus student housing development with proactive permitting process. Q3 2022 Allow for various types and sizes of housing through updated flexible zoning code. Ongoing
B. Encourage new higher-end market rate housing development for high-wage workforce. This will help prevent home owners from "buying down" and balance the affordable housing supply.		X	X	X	Community Development Director (CDD)	NEW FTE Urban Renewal	Brokers, Developers, Hospital	Staff time. Urban renewal allocation.	<ul style="list-style-type: none"> Identify opportunities for market rate apartment projects downtown. 2Q 2020 Continue to collaborate with developers through public-private partnerships to build apts. Ongoing Determine available residential sites for high-income workforce. 4Q 2020
Objective 2.2: Prepare Youth for Economic Opportunity									
Outcome: Builds the local long-term workforce pipeline									
A. Enhance youth access to Science, Technology, Engineering and Math (STEM) related occupations.		X	X	X	NEW FTE	Community Development Director (CDD)	STEM Hub, Chamber, GTA, MCEDD, K-12 School District	Staff time	<ul style="list-style-type: none"> Support and promote the Gorge Works program that streamlines the internship process for business and industry. 2Q 2020 Work with STEM Hub to potentially track enrollment and completion in Career Technical Education (CTE) and other programs by industry cluster to ensure alignment with high-demand sectors. Determine gaps and how to resolve. (Potential grant opportunity through Oregon Community Foundation). 2Q 2021
B. Promote a STEM culture across the community			X	X	NEW FTE	Community Development Director (CDD)	STEM Hub, Chamber, Main Street, GTA	Staff time. Business sponsorships	<ul style="list-style-type: none"> Support North Wasco School District actions to improve facilities that will foster STEM education. Ongoing Sponsor and promote events such as a new The Dalles STEM Fair focused on maker space (Hood River STEM Fair is focused on robotics). 1 Q 2021
Objective 2.3: Attract Talent									
Outcome: Helps existing industry clusters grow in the short-term									
A. Attract talent to meet immediate needs for talent.				X	NEW FTE	Community Development Director (CDD)	CGCC, GTA, Chamber, MCEDD	Staff time	<ul style="list-style-type: none"> Create a Task Force (including CGCC) of diverse local residents that are the demographic make-up of the target audience. 1Q 2022 Task Force develops strategy for messaging, events and local engagement to attract desired group. 4Q 2022 Promote campaign with The Dalles High School and CGCC alumni database or utilizing social media tools. 1Q 2023
B. Develop a consistent message for business to attract workers.				X	NEW FTE	Community Development Director (CDD)	CGCC, GTA, Chamber, MCEDD, Hospital, Workforce Board	Staff time. \$20,000 for website development.	<ul style="list-style-type: none"> Work with local employers and partners to build a talent attraction website for the entire region. This will help them with their recruiting efforts, while also providing economic development marketing for the region. 1Q 2022

GOAL 3: CREATE PLACE

Actions	2019	2020	2021	Year 4&5	Lead Org/ Staff	City Staff Support	External Partners	Resource Required	Deliverable
Objective 3.1: Complete and Implement the Downtown Plan									
Outcome: Attracts amenities such as recreation services, retail, and restaurants that helps retain talent									
A. Consider applying for a federal Environment Protection Agency (EPA) brownfield grant to supplement the existing state grant. The EPA grant is a more substantial amount of funding that goes beyond environmental assessments. It will also pay for market analyses for retail, housing and office uses, proposed development site layouts and proforma analysis, as well as infrastructure analysis to foster private investment interest.	X	X	X		Community Development Director (CDD)	NEW FTE	Urban Renewal, County, Port, Main Street, MCEDD	Staff time. (No match required.)	<ul style="list-style-type: none"> Work with engineering firm to prepare grant application. 3Q 2019 Identify additional properties for clean up. 4Q 2020 Identify infrastructure needs and solutions. 4Q 2021
B. Determine and permit the necessary public infrastructure to encourage the desired private investment in conjunction with the project. (Do not build the infrastructure without private investment commitment.)			X	X	Community Development Director (CDD)	Public Works	Main Street, Utility providers	Staff time	<ul style="list-style-type: none"> Prepare a list of public infrastructure projects and costs that are required with new private investment. 4Q 2021 Allocate urban renewal budget. 1Q 2022 Construct infrastructure in conjunction with private investment as an incentive. Ongoing
C. Align city policies with downtown plan and ED Strategy.		X			Community Development Director (CDD)	NEW FTE	CGCC, Main Street, Chamber	Staff time	<ul style="list-style-type: none"> Allow for small niche manufacturing for food production and manufacturing. Q4 2020 Continue a storefront improvement program for strategic downtown areas. Q4 2020 Allow for mobile trucks and align with CC culinary program to help incubate new restaurants. Ongoing
Objective 3.2: Celebrate The Dalles									
Outcome: Conveys to businesses, and their future employees, why they should stay and grow here.									
A. Enhance the image of downtown.	X	X			Community Development Director (CDD)	City Manager Office	Main Street, Chamber, DEQ	Staff time	<ul style="list-style-type: none"> Align economic development with beautification committee and private investment. Q4 2019 Discuss and derive solutions as to how the AmeriTies facility can mitigate impacts. Q1 2020
B. Define and promote a vision for The Dalles		X	X		Community Development Director (CDD)	NEW FTE	Main Street, Chamber	Staff time.	<ul style="list-style-type: none"> Work with community stakeholders, including the Chamber, to define the unique qualities that the community embraces and is authentic. Use these assets to tell the story and vision of The Dalles. (Investing resources in another brand or tagline is not recommended. Just tell the story, which is much bigger and richer than a tagline.) Q3 2020 Utilize and build off the research and recommendations in the City of The Dalles Vision Action Plan completed in May 2011. Ongoing. Work with the Chamber and local industries to promote business stories that exemplify The Dalles vision. Q1 2021

Objective 3.3: Support Local Retailers and Expand the Market

Outcome: Increased amount of retail that serves the local community

A. Cultivate success for existing retailers.	X	X			Community Development Director (CDD)	NEW FTE	Main Street, Chamber, SBDC	Staff time. Consultant. \$20,000	<ul style="list-style-type: none"> Build off and collaborate with Chamber's prior work of providing a consultant to retailers. Hire a consultant to educate and train existing retailers on best practices to improve sales. 1Q 2020 Support and sponsor events downtown with consistent marketing, promotion and coordination. Ongoing
B. Attract new retailers.		X	X	X	Community Development Director (CDD)	NEW FTE	Main Street, Chamber, County	Staff time. Consultant \$20,000	<ul style="list-style-type: none"> Visit City of Beaverton to understand how they have been successful with their restaurant attraction strategy. 1Q 2020 Implement a "pre-lease" program in the city to help new local retailers navigate the permit process. This is a complimentary and informal process that introduces permit review staff to potential business owners and considered space to encourage proactive solutions or identification of costly improvements up front. 2Q 2020 Create a retail attraction strategy to recruit new restaurants. 4Q 2020 Work with local wineries to consider a downtown storefront/tasting rooms (similar to Walla Walla). Ongoing

Objective 3.4: Promote the Gorge and Enhance Access to Outdoors

Outcome: Sets The Dalles apart from other Oregon communities

A. Enhance and promote the bike trail network surrounding The Dalles	X	X	X	X	NEW FTE	Community Development Director (CDD)	Main Street, Chamber, Wasco County, Travel Oregon, ODOT	Staff time.	<ul style="list-style-type: none"> Support and promote events and assets such as Gravel Grinder and Highway 30 Trail connector. Ongoing Work with Columbia Gorge Interagency Public Recreation Action Team to improve and expand trails. Ongoing Complete the Bike Hub project. Q4 2021
B. Work with stakeholders to enhance promotion of the Gorge		X	X	X	NEW FTE	Community Development Director (CDD)	Main Street, Chamber, Tourism Organizations, Northern Wasco County Park and Recreation District	Staff time.	<ul style="list-style-type: none"> Utilize existing information, as in Ready Set Gorge, to define a comprehensive of list of recreation assets within Gorge for promotion throughout economic development marketing. Q1 2020 Utilize for Task 1.3.D, 2.3.B and 3.2.B. Ongoing