



ACHIEVING THE OREGON SHINES VISION HIGHLIGHTS

2009 Benchmark Report to the People of Oregon

QUALITY JOBS FOR
ALL OREGONIANS



CIVIC
ENGAGEMENT

OFFICIAL ELECTION BALLOT
VOTE & RETURN PROMPTLY



PUBLIC SAFETY



ENGAGED,
CARING & SAFE
COMMUNITIES

HEALTHY,
SUSTAINABLE
SURROUNDINGS

BUILT
ENVIRONMENT



NATURAL
ENVIRONMENT



FEBRUARY 2009
www.oregon.gov/DAS/OPB
<http://benchmarks.oregon.gov>

The Progress Board believes that the accuracy, neutrality and nonpartisan spirit of its reporting is best maintained by providing “just the facts.” This report does not attempt to analyze underlying causes or provide answers. Rather, it is intended to inspire constructive exploration of why Oregon’s results are the way they are and how to make them better.



WELCOME TO OREGON'S 2009 BENCHMARK REPORT

Dear Oregonian,

Is Oregon making progress toward its goals? As required by law, the Oregon Progress Board answers using 91 “yardsticks” called Oregon Benchmarks. Benchmarks are the indicators chosen by Oregonians as fair, efficient ways to measure economic, social and environmental progress.

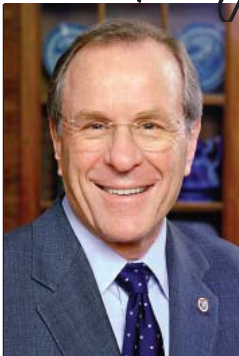
This report is a unique tool, a base of evidence that we can all use to better understand our state. Individual benchmark grades and analyses are online at <http://benchmarks.oregon.gov>, where you can generate your own benchmark report. The Highlights report rolls up individual benchmark grades to show how well or poorly Oregon is progressing toward three goals. The goals come from Oregon’s long-range strategic plan, called Oregon Shines:

1. Quality jobs for all Oregonians (economic well-being);
2. Engaged, caring and safe communities (social well-being); and
3. Healthy, sustainable surroundings (environmental well-being).

Oregon Shines and the benchmarks are for all of Oregon and all Oregonians, including state government. We encourage you to use the facts and figures in this report to improve your community and your state.

Sincerely,

Theodore R. Kulongoski



Theodore R. Kulongoski
Governor

Peter Courtney



Peter Courtney
President of the Senate

Dave Hunt



Dave Hunt
Speaker of the House



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TABLE OF CONTENTS

WELCOME LETTER	
EXECUTIVE SUMMARY	1
INTRODUCTION	5
GOAL 1: Quality Jobs for All Oregonians	
ECONOMY	7
Business Vitality, Economic Capacity, Business Costs, Income and International	
EDUCATION	9
K-12, Post-secondary and Skill Development	
GOAL 2: Engaged, Caring and Safe Communities	
CIVIC ENGAGEMENT	11
Participation, Taxes, Public Sector Performance and Culture	
SOCIAL SUPPORT	13
Health, Protection, Poverty and Independent Living	
PUBLIC SAFETY	15
Crime and Emergency Preparedness	
GOAL 3: Healthy, Sustainable Surroundings	
BUILT ENVIRONMENT	17
Growth Management, Infrastructure and Housing	
NATURAL ENVIRONMENT	19
Air, Water, Land, Plants and Wildlife, and Outdoor Recreation	
Appendix 1: Benchmark Grade Tables	21
Appendix 2: User Guide (http://benchmarks.oregon.gov)	25
Appendix 3: Benchmark and Key Performance Measure Alignment to Oregon Shines II	28

Key Definitions

Oregon Shines: Oregon’s high-level, long-term strategic plan. Oregon Shines was legislatively established in 1989, updated in 1997 and is due to be updated again soon. Oregon Shines II, which is the current plan, has three interrelated goals:

- Quality Jobs for All Oregonians (economic well-being)
- Engaged, Caring and Safe Communities (social well-being)
- Healthy, Sustainable Surroundings (environmental well-being)

Oregon Benchmarks: The “yardsticks” used to measure and assess Oregon’s progress toward the goals. Over 250 Oregon Benchmarks were legislatively approved in 1989. That number was reduced in 1997 to a more manageable number. Today there are 91 Oregon Benchmarks in Economy, Education, Civic Engagement, Social Support, Public Safety, Built Environment and Natural Environment.

EXECUTIVE SUMMARY

Achieving the Oregon Shines Vision

2009 Benchmark Report to the People of Oregon

This ninth biennial evaluation explores whether we, as a state, are making progress toward our statewide goals. The goals come from *Oregon Shines*, the state’s 20-year, strategic plan.

IN A NUTSHELL

IS OREGON MAKING PROGRESS?

Oregon continues to rate positively in public safety and built environment, but aspects of the economy, education, civic engagement, social support and the natural environment point out a continuation of challenges seen in the 2007 report.

Of the seven benchmark categories, economy worsened from the last report. The other six categories fare the same.

One factor affecting Oregon’s progress is the changing demographic makeup of the state. Oregon’s growing diversity brings new and important challenges. We believe these challenges are showing up in data for such benchmarks as per capita income, student skill levels, adult educational attainment, prenatal care, poverty and affordable housing.¹

¹ For more information, see the Progress Board’s *Race and Ethnicity Report* (June 2008).

Oregon’s Progress toward the Oregon Shines Goals				
Oregon Shines Goals:	2003 Report	2005 Report	2007 Report	2009 Report
<i>Goal 1: Quality Jobs for All Oregonians</i>				
Economy	Yes, but	Yes, but	Yes, but	No, but
Education	Yes	Yes, but	No, but	No, but
<i>Goal 2: Engaged, Caring and Safe Communities</i>				
Civic Engagement	No, but	No, but	No, but	No, but
Social Support	Yes, but	Yes, but	No, but	No, but
Public Safety	Yes, but	Yes, but	Yes, but	Yes, but
<i>Goal 3: Healthy, Sustainable Surroundings</i>				
Built Environment	No, but	Yes, but	Yes, but	Yes, but
Natural Environment	Yes, but	Yes, but	No, but	No, but

GOAL #1: Quality Jobs for All Oregonians

Two benchmark categories, *Economy* and *Education* measure progress toward Goal #1. *Economy* gets a “No, but,” its first drop in grade since the 2003 report. The current economic crisis, while just beginning to show up in our yearly data, weakened both the business vitality and income indicators. *Education*, the other half of the equation, retains its “No, but” grade from the 2007 report. Although the percent of adults with high school and college degrees is gradually increasing, the K-12 benchmarks confirm the challenges currently being tackled by Oregon’s education enterprise. Lower-than-targeted levels of workforce training also contribute to the education grade.

Notable improvements and concerns for Goal #1:

- *Economy’s notable strength is export stability.* Oregon’s network of trading partners has become increasingly diverse over the last decade. Not all of our export eggs are in the same basket. Among other things, this should help our economy recover. *The notable concern is per capita personal income,* the same concern as in the 2007 report. At 90.7 percent of the national average, this key benchmark has been in decline since the mid-1990s and has reached a 16-year low.

- Data underpinning this report do not reveal a benchmark that we feel is a “notable improvement” for education. The closest candidate is benchmark #22, Oregon’s high school dropout rate. This saw significant improvements in the 1990s and has stayed low since the early 2000s. However, it still is shy of the 2010 target. One *notable concern is eighth-grade reading,* where only 65 percent of eighth-graders achieved grade-level standards, well below the 2010 target of 80 percent.



GOAL #2: Engaged, Caring and Safe Communities

Data for *Civic Engagement*, *Social Support*, and *Public Safety* benchmarks support the same grades for Goal #2 as in the 2007 report. For example, in *Civic Engagement*, fewer and fewer Oregonians can correctly identify the primary source of state revenues (personal income tax) and the largest general fund expenditure (education). Despite Oregon's high ranking for voting and the historic nature of the 2008 election, Oregon saw a drop in the estimate of eligible voters participating in this presidential election. In *Social Support*, data reveal continued concerns related to children's health and protection, and poverty. However in *Public Safety*, progress continues to be made in crime categories and emergency preparedness.



Notable strengths and concerns for Goal #2:

- Civic Engagement's *notable strength is volunteering*. About one-third of all Oregonians engaged in a volunteer activity in the last three-year estimate. *A notable concern is that 88 percent of Oregonians lack a basic understanding of the state's tax system*, a new decade low.
- Social Support's *notable improvement is the increasing rate of adult non-smokers*, which improved five percentage points in the last 10 years. Its *notable concern is hunger*. Oregon's previously improving hunger situation has worsened again. In November 2008, Oregon was once again ranked as one of the hungriest states in the nation.
- Public Safety's *notable improvement is emergency preparedness*. The dedication of Oregon's municipalities, in conjunction with state and federal officials, has resulted in better-prepared communities throughout Oregon. *A notable concern is the sharp increase in the percent of teenagers self-reporting that they carried a weapon* in the past 30 days.

GOAL #3: Healthy, Sustainable Surroundings

Built Environment and *Natural Environment* benchmarks gauge progress toward Goal #3. *Built Environment* gets a “Yes, but” for 2009, the same grade given in 2007. Oregon continues to do a good job on traffic-related benchmarks. However, the Oregon Transportation Commission indicates future improvement will be difficult due to a growing maintenance backlog and increasing costs. *Natural Environment* retains the “No, but” grade first given in 2007. Benchmarks for air quality and CO₂ emissions continue to show a lack of progress. The indicators for water and land again show mixed progress - some improvements tempered by concerns. Numerous indicators in the Natural Environment category lack new or recent data.

Notable strengths and concerns for Goal #3:

- Built Environment’s *notable improvement continues to be state road condition*. The percentage of state roads in fair or better condition reached 87 percent in 2006. The *notable concern is affordable housing*. In 2007, more than half of both lower-income owners and renters spent 30 percent or more of their household income on housing costs.

- Natural Environment’s *notable strength is the first-time release of natural habitat estimates* (Oregon Benchmark #89). The creation and release of this data by Oregon’s Institute for Natural Resources is an enormous step toward understanding the changes over time to natural habitats in Oregon’s numerous eco-regions. The state’s *notable concern is air quality*. In recent years, Oregon has experienced an increase in the number of days where air quality is harmful, particularly to sensitive groups (primarily the elderly, children, and those with respiratory challenges).



INTRODUCTION

WHY THIS REPORT

The purpose of this report is to help Oregonians understand their collective strengths and weaknesses and to stimulate new, more informed conversations and ways of doing things.

OREGON BENCHMARK CATEGORIES

GOAL 1: Quality Jobs for All Oregonians

1. Economy Benchmarks
2. Education Benchmarks

GOAL 2: Engaged, Caring and Safe Communities

3. Civic Engagement Benchmarks
4. Social Support Benchmarks
5. Public Safety Benchmarks

GOAL 3: Healthy, Sustainable Surroundings

6. Built Environment Benchmarks
7. Natural Environment Benchmarks

One thing the report is not designed to do is provide simple answers. It does not, for example, deduce the underlying causes of teenage substance use, or hunger, or stream water quality. Instead, it lays the groundwork for putting aside differences, basing our dialogue on data, and working to improve the quality of life for all Oregonians now and in the future.

HOW WE ASSESS PROGRESS

Two things are needed to assess Oregon's progress for each benchmark: targets and data. Sixty-seven of the 91 benchmarks have both. Many benchmarks have "parts" (e.g., 7a and 7b), yielding a total of 158 benchmark indicators, over 100 of which are graded in this report. The Progress Board assesses progress for each indicator and rolls up those assessments into seven category grades (see box).

Grades are based on whether data meet or are trending toward the target. Criteria for the grades are explained in Appendix 1. Tables there show all benchmark titles and grades. Detailed tables showing data, targets and grades can be found at www.oregon.gov/DAS/OPB.

Throughout this report, where data are in the form of national rankings, a rank of first indicates "best." The exception is Oregon's national rank for food insecurity and hunger, where first means "worst."

Each section also offers, where possible, how Oregon compares to Washington and the nation.

For nearly 20 years the Progress Board has been given the responsibility of evaluating Oregon's overall progress toward statewide goals for economic, social and environmental well-being. The goals come from *Oregon Shines*, the state's 20-year, strategic plan. This ninth biennial benchmark report continues that tradition.

To evaluate progress, the Progress Board uses an internationally recognized set of "yard sticks" called Oregon Benchmarks. Viewed together, these 91 societal measures paint a high-level picture of how Oregon is doing.

Visit <http://benchmarks.oregon.gov> for benchmark-specific analyses. See Appendix 1 for individual benchmark and subcategory grades.

Washington was chosen as the comparator because its location, economy and geography are similar to Oregon's.

OREGON SHINES III

The basis for evaluating progress is Oregon's strategic plan, Oregon Shines. Established in 1989, this year marks the end of that 20-year planning horizon. State statute² directs the Progress Board to "formulate a strategy that describes and explains a vision for Oregon's economic, social and environmental progress for 20 years into the future." Working with the Governor and the Legislature, the Progress Board will update this unique statewide plan for the next 20 years.

Our hope, in this time of uncertainty, is to re-engage Oregonians on where Oregon should be headed, how to get there and how to best measure and track progress using Oregon's award-winning benchmark tradition.

GENERATE YOUR BENCHMARK REPORT ONLINE

This *Highlights* report is a short, point-in-time summary of Oregon's progress based on the detailed benchmark analyses at: <http://benchmarks.oregon.gov>. Visitors can access data sources, link to benchmark partners, create benchmark reports, and download data tables. The Progress Board continually updates benchmarks as new data become available.

This benchmark report reflects the state as a whole, but important variations exist between areas in the state.

² ORS 285A. 150

County benchmark data, available at www.oregon.gov/DAS/OPB/CountyData.shtml, shed light on some of these unique strengths and challenges facing Oregon's local communities. Updated annually, county benchmarks offer local governments, non-profits, educators and residents a data-rich view of their county over time and in comparison to other Oregon counties.

STATE GOVERNMENT LINKS TO OREGON BENCHMARKS

As one of Oregon's largest partners, Oregon state government aligns its work to Oregon Shines and the Oregon Benchmarks. State agencies link legislatively-approved key performance measures to the Oregon Benchmarks as part of their biennial budget process. Agencies are required to report results every year. Online visitors can learn about benchmark-related government results in the "Partners and More" module of each benchmark's online report.

YOU CAN LINK TO THE BENCHMARKS

Oregon Shines and the benchmarks are for all of Oregon and all Oregonians. Our online format offers Oregonians across the state an easy way to share benchmark-related programs, experiences and knowledge. The Progress Board invites all Oregonians to become a part of this virtual community in the "Partners and More" module of each benchmark's online report.

*O*regon Benchmarks show progress toward statewide goals. At this high level, it is easier for public officials, foundations, interest groups and the business community to find a shared vision and shared data around which to collaborate.

Bob Landauer,
Progress Board Member

ECONOMY

ABOUT THESE BENCHMARKS

The first goal of Oregon Shines is “Quality Jobs for All Oregonians.” Oregon’s economy benchmarks measure the state’s progress in areas that are critical to achieving this goal: business vitality, economic capacity, business costs, income and an international frame of mind.

MAKING PROGRESS?

NO, BUT...

With the current recession engulfing our interconnected world, Oregon’s benchmarks will likely continue to reflect a challenging economic condition for the foreseeable future. Oregon’s overall grade for economy dropped to negative territory for the first time since this grading system was launched in 2003.

There is some good news. Over half of the economy benchmarks indicate that Oregon’s economy has a strong base on which to recover. Oregon ranked in the top 10 states for new employers for most of the last 10 years and for economic diversification in both 2006 and 2007. It added 27,000 jobs in 2007.



Industry research and development shows progress, per worker wages are at a decade high and Oregon trades with an increasingly diverse network of partners.

However, of the 22 graded benchmark indicators in economy, nearly half will probably not make the 2010 target without significant changes in circumstances, policies, and action. The most telling benchmark, personal income as a percent of the U.S. average personal income, continued its long decline and hit a 16-year low. Only one Oregon worker in three is at or above 150 percent of poverty for a family of four. Net job growth in rural areas slowed significantly in 2007. Compared to other states, Oregon’s concentration of professional services, such as those provided by lawyers and accountants, fell to a new decade low.

WHAT STANDS OUT

Oregon’s *notable improvement is export stability*. The state steadily increased the percent of exports to non-prime trading partners in the last 10 years. This measure of international diversification ensures Oregon’s industries a varied source of opportunities and markets.

As in the 2007 report, Oregon’s *notable concern remains per capita personal income* as measured against the national average. Oregonians on average make roughly 91 percent of the U.S. average personal income, down approximately two percentage points from the 2007 report. This indicator has seen little sustained progress since the 1980s.

HOW OREGON COMPARES

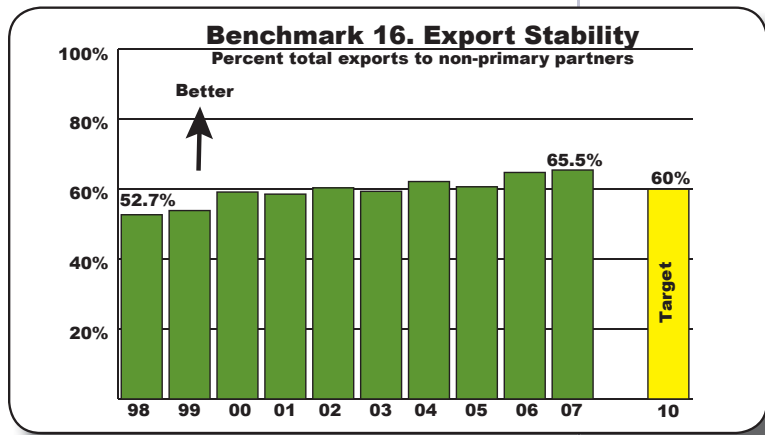
Nationally, Oregon ranks in the middle of the pack for cost of doing business and worker wages, and in the bottom 10 states for unemployment.

Of the 22 economy indicators for which comparators were available, Oregon is better than Washington on six benchmarks, including export stability. Oregon is worse than Washington on 12, including per capita personal income. The two states are similar for non-labor costs of doing business and per capita income in rural areas.

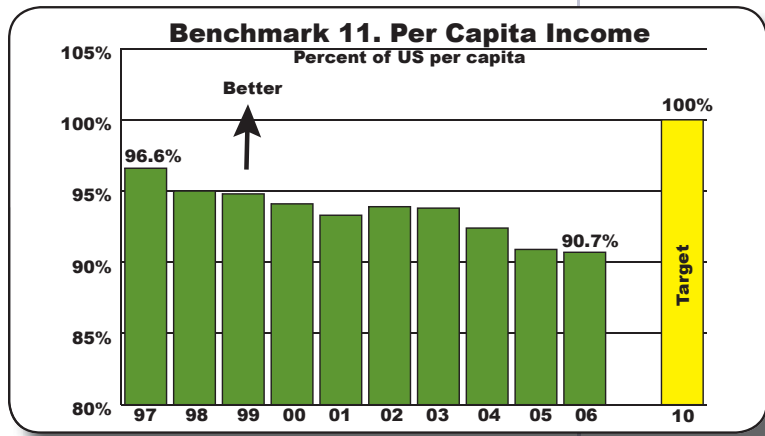
The slowdown in the Oregon economy in 2007 has given way to a deepening recession in the latter part of 2008 and into 2009. As this world recession continues, the strong export growth of the past year will start to wane. Although 2009 will be a difficult year to meet the economic benchmark goals, Oregon is well positioned to take advantage of an economic recovery through its population base (“creative class”), energy and sustainability expertise, and strong ties to export markets in the Pacific Rim.

*Tom Potiowsky,
State Economist*

NOTABLE IMPROVEMENT IN ECONOMY:



NOTABLE CONCERN IN ECONOMY:



EDUCATION

ABOUT THESE BENCHMARKS

Quality jobs, a key goal of *Oregon Shines*, require qualified workers. Oregon Benchmarks #18 through #29 gauge development of a world-class workforce, in particular Oregon's progress in pre-kindergarten to 12th grade (preK-12), adult education level and adult skill development.

MAKING PROGRESS?

NO, BUT...

Benchmark data lead to the same grade for education as the 2007 report. The preK-12 category worsened because of a lower grade for children entering school ready to learn and lack of progress in eighth-grade reading. Third-grade reading scores improved in 2007 and again in 2008, but this remains well below the 97 percent target originally established for this benchmark. The Progress Board will revisit the target in light of data based on new test standards established in 2007.



Whether Oregon makes progress in its education and income benchmarks depends on how this state educates and trains its minority population in the years to come.

*Ray Caballero,
Oregon Progress Board*

The good news is that post-secondary indicators improved because of higher percentages of adults with a high school education and college degrees. The improved grades are based on newly sourced data and new 2010 targets. The new targets step toward the "40-40-20" goals for the year 2025 established by Oregon's Joint Boards of Education:

- 40 percent of the adult population with a Bachelors degree or higher;
- 40 percent (in addition to the first 40) with post-high school training such as an Associates degree or certificate; and
- 20 percent (everyone else) with a high school diploma or equivalent.

Since the 2007 report, adult skill development indicators remained in negative territory. The percent of working Oregonians who received at least 20 hours of training annually is stalled at one-third of the working population, well behind 2010 target of three-fourths. Growth in households with Internet access has slowed, and computer usage among Oregonians fluctuates around the 60 percent level. The 2010 target is 70 percent.

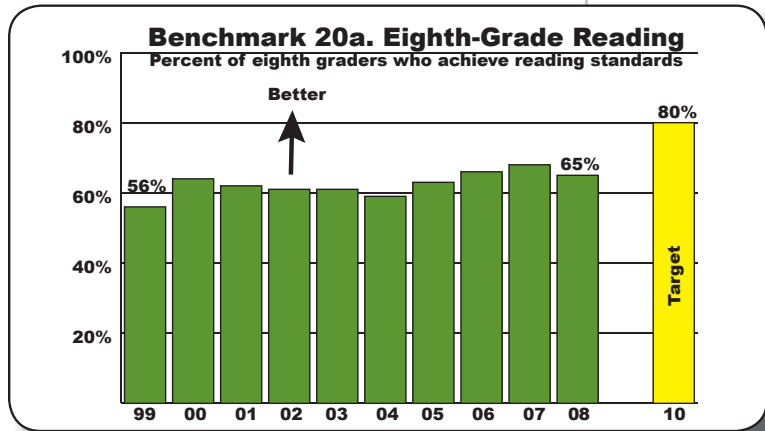
WHAT STANDS OUT

Data underpinning this report do not reveal a benchmark that we feel is a “notable improvement” for education. The closest candidate is benchmark #22, Oregon’s high school dropout rate. This saw significant improvements in the 1990s and has stayed consistently low since the early 2000s. However, it is still shy of the 2010 target.

A notable concern is eighth-grade reading. In 2008, only 65 percent of eighth-graders achieved standards in reading, down from 2007 and moving away from the 80 percent target. More troubling is the distribution across race and ethnicity. For the 2007-08 school year, 71 percent of white students met standards, yet only 54 percent of Native American, 49 percent of African American, and 40 percent of Hispanic students met standards.³

³Race/Ethnicity data from Oregon Department of Education Statewide Assessment Report Card 2008 <http://www.ode.state.or.us/data/annreportcard/rpt-card2008.pdf>

NOTABLE CONCERN IN EDUCATION:



HOW OREGON COMPARES

Nationally, Oregon ranks in the top third of all states for college graduates, computer and Internet usage. It ranks in the middle third for eighth-grade reading and math and the percent of adults with a high school education. It ranks in the bottom third for the percent of eligible children enrolled in Head Start, and fourth-grade reading and math.

Oregon is similar to or better than Washington in more than half of the education comparators, including the high school dropout rate. Oregon is worse than Washington for fourth-grade reading and math, adults with a high school education and computer usage.

The result of recent, focused effort and investment in Oregon’s Education Enterprise will show up in the data several years down the line. For example, with the Shared Responsibility Model, we will see an increase in the number of Oregonians going to college. However, that increase will take one to five years to move the data on the benchmarks tracking adult educational achievement.

*James Sager,
Education Policy Advisor to the Governor*

CIVIC ENGAGEMENT

ABOUT THESE BENCHMARKS

Nine civic engagement benchmarks measure the involvement and understanding needed to create successful partnerships between citizens, their governments and communities. They underpin the second Oregon Shines goal, “Engaged, Caring and Safe Communities.” The benchmarks address citizen participation, taxes, public sector performance and culture.

MAKING PROGRESS?

NO, BUT...

Five of the six graded civic engagement benchmarks received negative grades. Despite the historic nature of the 2008 presidential election, a lower percent of Oregon’s eligible voters turned out to vote. The rate is still better than the U.S., but not enough to prevent Oregon’s drop in rank from 4th in 2004 to 12th in 2008.

About half of all Oregonians feel a part of their community. This maintains the higher levels of the post-9/11 era but fails to progress

Voting is a basic expectation of all citizens. We should feel obligated to cast a vote whether or not the election has great public interest. Voting is the basic first step to a broader interest and participation in a community’s civic life. With vote-by-mail there is no reason why Oregon should not rank first in the nation in voting.

*Ray Caballero,
Oregon Progress Board*

appreciably toward the 2010 target of 60 percent. Only 12 percent of Oregonians understand that their state’s biggest expenditure and revenue categories are education and income taxes, respectively. Oregon’s libraries continue to struggle to meet minimum service criteria. In 2008, only 81 percent of Oregonians were adequately served by public libraries, down from 87 percent in 2001.

There is good news in civic engagement. Roughly one in three Oregonians aged 16 and over volunteered. Oregon is in the top third of all states in its volunteering rate, slightly behind Washington. Oregon’s Standard & Poor’s bond rating increased after the 2007 legislative session to AA. A majority of Oregonians participated in some form of arts performance or presentation in 2008.



WHAT STANDS OUT

Volunteering represents Oregon's notable strength in the civic engagement category. A third of Oregonians volunteering translates into an estimated 139.4 million hours of service valued at over two and a half billion dollars. The *notable concern is a general lack of understanding of the state's tax system*, which has worsened in recent biennia.

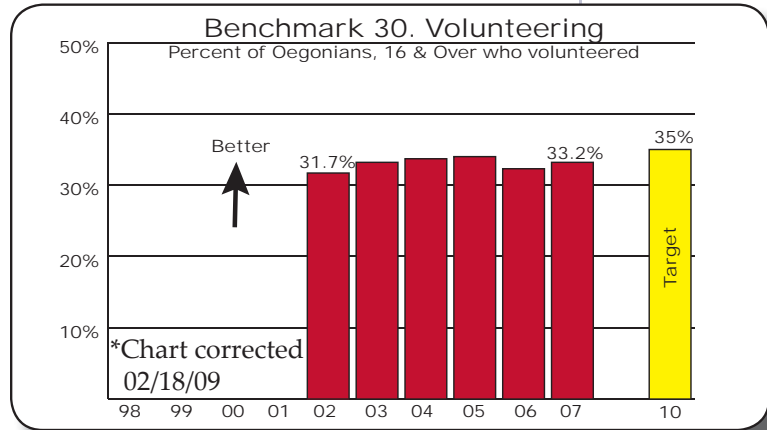
When I see how much Oregonians volunteer, it makes me proud to be from this great state. In tough times, this kind of personal giving is more important than ever. Our new president said it well in his inauguration speech. "What is required of us now is a new era of responsibility - a recognition, on the part of every American, that we have duties to ourselves, our nation, and the world, duties that we do not grudgingly accept but rather seize gladly, firm in the knowledge that there is nothing so satisfying to the spirit, so defining of our character, than giving our all to a difficult task. This is the price and the promise of citizenship."

*Sue Densmore,
Densmore Communications and
Oregon Progress Board*

HOW OREGON COMPARES

Oregon is better or similar to Washington on four of the five civic engagement benchmarks for which state comparators exist: volunteering, voting, taxes and charges, and bond rating. It exceeds the U.S. average in volunteering, voting and arts participation.

NOTABLE IMPROVEMENT IN CIVIC ENGAGEMENT:



NOTABLE CONCERN IN CIVIC ENGAGEMENT:

