

UPDATED September 22, 2015

HIGH FOCUS PRIORITIES:

For High Focus Priorities, the committee, coordinator and team will actively engage in seeking solutions and projects that contribute to successful outcomes for the priority.

1. Establish a four year university (OSU Cascades)
2. Retain and Grow Jobs
3. Ensure the region has land and infrastructure available to retain/attract employers
4. Enhance Transit in Central Oregon (COIC led priority)
5. Support the Regional Creative Economy
6. Increase Work Force Housing:
7. Encourage Water conservation and restoration. Improve Water Availability

SUPPORT PRIORITIES

For Support Priorities, the committee, coordinator and team will monitor, engage and support as needed and requested. The coordinator/team will continue working with communities opportunistically to address these priorities and to serve as a catalyst for their successful accomplishment.

1. Improve Sewer Infrastructure
2. Support Regional Agriculture (COIC led priority)
3. Improve forest health

SUPPORTING THE REGIONAL CREATIVE ECONOMY

A REPORT TO THE CENTRAL OREGON REGIONAL SOLUTIONS ADISORY COMMITTEE

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October 25, 2016**

Report to CORSAC Regarding the Creative Economy in Central Oregon

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INTRODUCTION

The Central Oregon Regional Solutions Advisory Committee (CORSAC) was established in 2011 and staffed by Annette Liebe from the Governor's office. Its specific charge was to "Engage all resources in the community (public, private and civic) to shape the region's future and accelerate and complete on the ground economic and community development projects." During the subsequent months it debated and eventually crafted the following strategies that it believed would lead to increased employment in the Tri-County (Deschutes, Jefferson and Crook) of Central Oregon:

1. Establish a four-year university (OSU Cascades)
2. Retain and grow jobs
3. Ensure the region has land an infrastructure available to attract/retain employees
4. Enhance transit in Central Oregon (COIC led priority)
5. Support the Regional Creative Economy
6. increase work force housing
7. Encourage water conservation and restoration; improve water availability
8. Improve sewer infrastructure
9. Support regional agriculture (COIC led priority)
10. Improve forest health

This report has been prepared by consultant Paul Nicholson who was engaged by CORSAC to provide strategies in relation to the fifth goal in CORSAC's strategies: "To support the Regional Creative Economy".

SUPPORTING THE CENTRAL OREGON CREATIVE ECONOMY EXECUTIVE SUMMARY

INTRODUCTION

The charge for the Central Oregon Regional Solutions Action Committee (CORSAC) is “to shape the region’s future and accelerate and complete on-the-ground economic and community development projects.” This report has been prepared by consultant Paul Nicholson who was engaged by CORSAC to provide strategies in relation to the fifth goal in CORSAC’s priorities: “To support the Regional Creative Economy.”

PROCESS

The following elements were undertaken in the preparation of this report:

1. Creation of a database of Central Oregon arts and cultural organizations.
2. Integration of the arts and cultural database with data at the Oregon Employment Department.
3. Development of a survey instrument and subsequent implementation and analysis.
4. Analysis of data in arts and culture database.
5. Identification of selected Thought Leaders and subsequent interviews.
6. Preparation and presentation of Report.

FINDINGS

Key findings are as follows:

1. There are 168 arts and culture organizations in Central Oregon. Approximately 44 of these (26%) are one person businesses. 75 are nonprofits (45%).
2. 46 of the arts and culture organizations have no employees (i.e., are completely run by volunteers.)
3. Only 43 of the 168 organizations in the arts and culture sector are actually covered in the Oregon Employment Department’s reports – the remainder do not submit Quarterlies for various reasons.
4. The average payroll per employee in the Employment Department’s arts and culture sector database is \$25,853 with an average of 21 employees.
5. The total payroll for the 122 organizations with employees can be calculated at \$26.8 million.
6. There are at least 1,076 employees in the arts and culture sector.
7. According to various sources, there are a total of 2,971 people employed in the region’s Creative Economy (as defined by Richard Florida.)
8. The arts and culture sector represents approximately one third of the total creative economy in the region.
9. The top 10 employees account for 91% of the employment in the arts and culture sector.
10. The total number of organizations in the creative sector is 444, with 38% being in the arts and culture sector.

SURVEY

All 168 organizations in the arts and culture sector were sent a short survey aimed at gathering statistical information on revenue, costs, assets, liabilities and the number of employees. In addition, they were each asked to identify the biggest challenge facing the sector in Central Oregon today, and invited to specify the two things that could best be done to enhance the region’s creative economy. The return rate on the survey was just 11%. Although the amount of financial information obtained was less than desired, the respondents gave many thoughtful answers to the open-ended questions.

RECOMMENDATIONS

1. Engage a top level firm to brand the region's arts and cultural vibrancy

There is a great "art vibe" in Central Oregon, but that strength has not been capitalized on through a strong branding program. Bringing in a top branding firm with a robust process will enable the arts and culture sector to be branded as strongly as that of the region's recreation activities.

2. Create a Region-wide Cultural Marketing Plan

This is the only way to make a larger statement about the cultural vibrancy in the region. The marketing plan should have three goals:

- a. To attract more people to the area to participate in arts and cultural activities and events.
- b. To lengthen the stay of current visitors through greater exposure to arts and culture activities.
- c. To attract the kind of workers and industries we want to see here.

3. Create and Fund a Central Oregon "Arts Guru"

It would be a great benefit for there to be an "Arts Guru" for the region – someone who can speak for the arts and culture and make sure that arts and culture are at all the right tables.

4. Fund the creation of a centralized on-line system to give potential visitors one place to go to get information on all arts and culture events in the region

A centralized arts and culture events database with an on-line portal would enable greater connectivity between all the region's arts and cultural organizations while making it easier for potential visitors to plan their trip.

5. Set up and fund a Board Training Program for Non-Profits, focused on building capacity

Instituting a capacity-building program to enhance the effectiveness of nonprofit Boards in the region would have the double benefit of protecting existing jobs at those nonprofits and creating increased jobs as the nonprofits become more effective in their work.

6. Provide the seed money to allow the exploration of The Big Art Event

To make a significant difference in employment it will require the creation of an event that lasts longer than just two or three days, and is so singular that it has the ability to attract a substantial audience from outside the region. True growth in employment can only come if the event is able to "import" its audience.

7. Invest in a video that would promote the region's beauty and talent as a filming destination

A significant payoff in the way of jobs could result from the creation of a video that could be used to promote the region to mainstream moviemakers as well as independent film and television producers.

8. Provide the seed money to seriously explore the implications of a city-wide (or region-wide) mural extravaganza

As a rather wild and wooly idea I suggest that CORSAC provide the seed money to examine the possibility of a region-wide series of grand scale murals.

9. Support the creation of a Regional Arts and Culture Coalition

A three-county coalition would bring cohesion among all the arts and culture organizations.

CONCLUSION

Funding the seven recommendations presented in this report will go a long way toward giving arts and culture in the region the exposure it deserves, and, more importantly, lead to significant job growth.

ELEMENTS OF THE STUDY

The study had the following elements:

1. Review of relevant materials
2. Creation of a database of Central Oregon arts and cultural organizations.
3. Integration of Arts and Cultural database with data at the Oregon Employment Department
4. Development of a survey instrument and subsequent implementation
5. Identification of selected Thought Leaders and subsequent interviews
6. Explorations with relevant resources and review of literature
7. Analysis of data in arts and culture database
8. Preparation and presentation of Report

TERMINOLOGY

Creative economy

This term was coined by Richard Florida in his seminal book *The Rise of the Creative Class* in which he postulated that economies in which there was a strong Creative Class” were more robust economically than those where there was a deficit of creative people. Florida defines the Creative Class as “a class of workers whose job is to create meaningful new forms (2002). It is composed of scientists and engineers, university professors, poets and architects, and also includes "people in design, education, arts, music and entertainment, whose economic function is to create new ideas, new technology and/or creative content” (Florida, 2002, p. 8).

For the purposes of this study I have created a sub-group of the Creative Class that I am calling the Arts and Cultural Sector.

Arts and Cultural Sector

This sector includes arts organizations and individuals who are involved in the following activities: music, dance, theatre, painting, ceramics, photography, writing, film and television, radio, choirs, history museums, festivals, archaeological studies, galleries, songwriters, glassmaking, libraries, quilting, arts education, events, video, instrument making.

REVIEW OF RELEVANT MATERIAL

Central Oregon has a plethora of printed materials promoting its arts and cultural events and activities. These include:

- Brochures (e.g., First Friday Art Walk, Art around the Clock, Live at the Tower, Bend Gallery Guide etc.)
- Websites (e.g., BendOregon365.com)
- Magazines (e.g., Central Oregon, ...)
- Articles on Central Oregon's arts and culture
- Tourism websites (Travel Oregon, Visit Bend, etc.)

DATABASE OF CENTRAL OREGON ARTS AND CULTURE ORGANIZATIONS

As part of my work I developed a database of organizations that a part of the arts and culture sector in Central Oregon. The database is included in this study as Appendix A. It was developed from a number of sources:

- Individual suggestions
- Review of publications
- The Cascade Book of Lists
- WESTAF's Creative Vitality Index

The database is made up in 168 organizations involved in arts and culture activities. Undoubtedly I have missed some, but this is as complete a database as can be currently constructed.

For each organization in the database I have identified: contact information, basic purpose, email address, website address, and if available, employment and budget.

INTEGRATION OF DATABASE WITH DEPARTMENT OF EMPLOYMENT DATA

The arts and culture database was shared with Damon Runberg, Regional Economist with the Oregon Employment Department. Damon checked each name to determine if that organization/individual was part of his employment database of organizations that submitted Quarterly Reports. Those that were included in his database are highlighted in green in the Arts and Culture Sector Database (Appendix A.)

The following statistics derived from the arts and culture database are significant:

1. Total organizations/Individuals in Arts and Culture (A & C) Database 168
2. Total A & C organizations included in the Employment Department system 43
3. Category breakdown of organizations in the Employment Department database is as follows:

Category	Number	Employees	Payroll
Organizations	30	878	\$22,672,160
Self-employed artists	3	5	\$219,539
Event Venues	3	9	\$103,597
Event Services	4	10	\$345,112
Film, Video and Television	3	10	\$237,323
Total	43	912	\$23,577,731

4. Average payroll per employee \$25,853
Average number of employees 21

5. Category breakdown of organizations and individuals not in the Employment Department database is as follows:

Category	Number	Est'd Employees	Payroll
Organizations	116	155	N/A
Self-employed artists	1	1	N/A
Event Venues	1	1	N/A
Event Services	0	0	N/A
Film, Video and Television	4	21 FTE	N/A
Other	4	4	
Total	126	164	N/A

OTHER COMPONENTS IN THE CREATIVE ECONOMY

Using the Cascade Book of Lists we can determine the size and scope of other businesses in Central Oregon that fall within Richard Florida’s Creative Economy, as follows:

Type	Number	Number of Employees
Advertising Agencies	21	103
Building Designers/Architects	34	190
Event and Meeting Planners	8	31
Graphic Design Professionals	21	91
Interior Designers	21	67
Landscape Architects	29	195
Landscape Designers	5	47
Media –Magazines	13	95
Media – Newspapers	10	266
Media – Other	4	32
Media – Radio	18	311
Media – Television	5	149
Photography Services	50	81
PR and Marketing	11	71
Publishers	8	55
Web Design and Social Media	17	111
Total Sector	275	1,895

A review of related websites reveals however that the Cascade Book of Lists does not include all the organizations or firms in each of the above categories – analysis indicates that the number of firms would be approximately 43% higher if all were included. Applying a specific correct to each category and making the assumption that organizations omitted from the Book of Lists have the same average number of employees, we can calculate that the actual number of firms and employees as as follows:

Type	Number	Number of Employees
Advertising Agencies	34	167
Building Designers/Architects	41	154
Event and Meeting Planners	8	31
Graphic Design Professionals	45	195
Interior Designers	30	96
Landscape Architects	35	235
Landscape Designers	26	244
Media –Magazines	19	139
Media – Newspapers	10	311

Media – Other	4	32
Media – Radio	18	311
Media – Television	5	149
Photography Services	66	107
PR and Marketing	15	97
Publishers	9	62
Web Design and Social Media	35	229
Total Creative Economy excl. A & C	419	2,558

WHAT THE DATA TELLS US

If we utilize the employment data included in the Cascade Book of Lists and also assume one employee for all other organizations in the Arts and Culture sector database we are able to calculate that at least 1,076 people are employed in arts and culture activities in Central Oregon, 912 of whom are covered in the Employment Department statistics. Using the “corrected” Cascade Book of Lists numbers we can calculate that the total number of employees in the Central Oregon Creative Economy is at least 3,634:

	Employment
Arts and Culture Sector – Employment Department	912
Arts and Culture Sector – not in Employment Department	164
Total Arts and Culture Sector	1,076
Other Creative Economy businesses	2,558
Total Creative Economy employment	3,634

This analysis reveals that arts and culture organizations represent about 30% of the total creative economy in Central Oregon.

If we extrapolate from the above numbers and use the average payroll per employee calculated in section 4 above (\$25,853) we can determine the total payroll for all the organizations in the Arts and Culture database:

Employment Department Payroll	\$23,577,731
Non-Department organizations (125 @ \$25,853)	\$3,231,625
Total Arts and Culture Sector Payroll	\$26,809,356

Additional Data

In addition to the above analysis, I considered data from the Creative Vitality Suite produced by WESTAF. This offers the following for 2014 – the latest year for which they have compiled the data:

- There are 2,979 people employed in what they call the Creative Economy in the four county area (including Wheeler) as detailed in Appendix C.
- Those 34 positions (specified in SOC Codes) pay an average of \$17.01 per hour (\$24,645 per year.)
- Total Earnings for the sector are \$73,418,491.
- If we look only at the occupations that are likely to fall within the Employment Department classifications those numbers become:
 - 16 positional classifications covering 1,158 workers
 - Average hourly rate of \$14.60 (\$22,402 per year)
 - Total payroll of \$25,941,661

While this is not exactly an ‘apples to apples’ comparison because the data is being looked at in different ways, the numbers are sufficiently comparable for us to have some reliance on their accuracy.

ANALYSIS OF ARTS AND CULTURE SURVEY

Invitations were sent out to 168 organizations involved in arts and culture in Central Oregon. The survey asked questions about the financial picture of the participants, their attendance, jobs currently in place and what would be anticipated in the near future, and whether they had a Board or not. In addition, the survey invited participants to comment on what they thought was the single biggest problem facing arts and culture in Central Oregon, and to suggest two ideas on how CORSAC could enhance the arts and culture scene in the three-county area.

The response rate was 13%. This rate was undoubtedly impacted by the very comprehensive American for the Arts, Arts and Prosperity survey that is currently underway, that can take from two to four hours to complete. "Survey fatigue" was a very real factor.

However, relevant and useful information was still available. The following is a snapshot of the 22 organizations that responded:

Organization focus

Visual arts	5
Galleries/art studios	5
Performing arts	2
School	1
Arts manufacturing	1
Museum	1
Movies	1
Fiber arts	1
Arts consulting	1
Others	4

Finances (most recent year)

Average revenue	\$131,891
Average Contribute income	\$197,371
Average Payroll Expenses	\$120,705
Average other expenses	\$203,840
Average Gain/Loss	\$16,546

Employment

Total full-time	20	(12 employers)
Total part-time	42	(12 employers)
Average part-time hours/week	19	(per employer with PT employees)
Average expected growth in employees	2	(in next five years)

Type of Organization

Non-profit/501 C (3)	48%
For-profit business	34%
Government	9%
Individual	9%

Use of Volunteers

Use volunteers	67%
Average number of volunteers	59

Board information

Have a Board of Directors	12
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Biggest Challenge in finding new Board members

Difficult finding Board members with strong community connections.

Board is slow to find/add new members.

Mentoring new Board members and matching their skills to organization needs and goals.

Have a great Board; continuing to work on Board Development to assure all feel invested and owning projects.

Small town with high level of volunteerism – few candidates with time.

People are busy.

Having time to spend on strategic recruitment.

Challenges in developing a fundraising focus.

Being the right fit for the organization.

Finding Board members with the expertise or interest in fundraising.

Having enough people on the Board that have the time to contribute effectively, have enough disposable income to contribute and have contacts with a lot of resources.

DISCUSSIONS WITH THOUGHT LEADERS

With the advice and input of various leaders in the community I created a list of Arts and Culture Thought Leaders in Central Oregon. They are as follows:

Renée Alexander	Architect
Pamela Hulse Andrews	Publisher
Jodie Barram	Development Director, Tower Theatre Foundation
Neil Bryant	Attorney, former State legislator; Chair Of HECC
Jamie Christman	Director of Govt. Affairs, Bend Chamber of Commerce
Kathy Deggendorfer	Artist; Philanthropist
Kevney Dugan	Executive Director, Visit Bend
Sandy Henderson	Film Executive
Mike Hollern	Chair CORSAC; Arts Advocate; Philanthropist
Becky Johnson	Vice-President OSU Cascades
René Mitchell	Arts advocate; Scale House
Cristy Lanfri	Arts Advocate; Philanthropist
Carol Leone	Executive Director, Warm Springs Museum
Cate O'Hagan	Arts Consultant
Ann Richardson	Managing Director, Sisters Folk Festival
Betty Roppe	Mayor of Prineville; member of CORSAC
Eric Sande	Executive Director, Redmond Chamber of Commerce
Linda Shelk	Philanthropist
Bill Smith	Developer; Philanthropist
Trish Smith	Arts advocate; Philanthropist
Cassandra Spring Schindler	Community strategist in the arts
Judy Trego	Executive Director, Sisters Chamber of Commerce
Amy Tykeson	Tykeson and Associates; member of CORSAC
Jody Ward	Arts Advocate; Philanthropist Dana
Valerie Warren	Operations Director, Visit Bend
Dana Whitelaw	Executive Director, High Desert Museum

Additional Resources consulted were:

Brian Wagner	Oregon Arts Commission
Donnie Maclurcan	Growth Theorist
Fran Willis	Regional Representative, Oregon Community Foundation

INTERVIEWS WITH THOUGHT LEADERS

Through more than 40 hours of discussion with the Thought Leaders I was able to gather a great deal of information about the region and the issues it faces. This information has been presented in the following sections, broken down into Assets, Opportunities and Challenges. I want to recognize the Thought Leaders for their generosity in time and spirit. It was truly a pleasure to engage with them.

Assets

My conversations with thought leaders revealed an incredible array of Arts and Culture Assets in Central Oregon:

- This is a small community. The town is kind, giving and supportive. The whole region is surrounded by incredible and accessible natural beauty, from the rivers to the mountains to the high desert. The outdoor recreation opportunities attract thousands of people to the area every year.
- Although Bend has lost some arts organizations recently, there is a tremendous interest in theater, arts and music.
- Bend is becoming more and more a creative collaborative community; as one Thought Leader put it, “Bend organizations all collaborate very well”:
 - Central Oregon city organizations and Chambers of Commerce meet regularly.
 - The 10th month Campaign has been initiated to bring attention to “ideas and Innovation”.
 - New collaborations are emerging e.g., BendFilm with the Tower Theater and McMenamins.
 - There are many quiet art heroes here (e.g., Oxford Hotel.). The question is How could they participate more?
 - The surrounding communities sense that there is a lot less disconnect now with Bend than there used to be – they no longer think of themselves as isolated. However, the separation is still felt in a very real way, even if the gap has been reduced.
 - People in the arts are willing to explore new ideas and ways of doing things; in the last three years there has been an increased strategic focus on the arts and culture with the 7.5% Bend cultural tourism fund that is distributing up to \$180,000 per year.
 - Visit Bend is trending to be more community engaged.
 - Scale House is becoming a virtual creative center that is delivering programming and workshops; has a vision of a studio, gallery, café, store. Goal is to be a collective center. Provides the opportunity for connection and conversation with a contemporary focus. The idea is to scale it up in accordance with the ability to control circumstances.

“Arts and culture are the economic engine of our community.

Judy Trego

- Many cottage industries have emerged over recent years, and the region remains a fertile area for development of new forms:
 - Guitar-making
 - Fiber Arts
 - Culinary
- There are “a lot of authors here” and a “huge contingent of song-writers”
- Facilities around the region are usually first class and provide a wide range of different experiential opportunities:
 - Deschutes County Fairgrounds
 - Les Schwab Amphitheater – 10 concerts a year
 - Prineville Fairgrounds – music venue
 - Crook County fair – has art entries, vendors include jewelry and crafts
 - Splash Park in Redmond is now the draw of the community
 - Redmond Airport increasingly presents exhibitions of art
 - Expo Center – 300+ events per year - arts concerts for up to 8,000 people; now has a marketing budget
 - Tower Theatre
- There are strong people and agencies committed to focusing efforts on improving the economic base in the region, and they are increasingly finding ways of working together:
 - Bend Economic Development Board
 - ACA is bringing the arts and cultural organizations together
 - Visit Bend is recognized as “an amazing advocate for the arts e.g., Arts in Public Places, Roundabout Art Map etc.”
 - There has been a renewed focus on developing activities in the shoulder season with the 10th Month Campaign
 - There is a developing jazz community – not-for-profit groups that work in new ways with non-traditional venues (e.g., Oxford Hotel)

“Tourism business has to be convinced of the value of the arts”
Neil Bryant

- There are already a great many well-established arts and culture organizations that are solidly based in the community and provide a plethora of arts experiences:
 - Sisters Folk Festival
 - Art in the High Desert
 - Tower Theater (Statistics: 60,000 attendances/year; 450 seats; education programs reach 49,000 per year; used for 200 days/year including other non profits that use their facilities for events, fund raisers etc.; 17 employees; 200 volunteers
 - Sisters Quilt Show – the largest outdoor quilt show in the world
 - A vibrant music scene

- 10 bands playing every weekend
 - Central Oregon Symphony
 - High Desert Chamber Music
 - Central Oregon Youth Orchestra
 - High Desert Chamber music
 - High Desert Museum
 - First Friday Art Walks in many communities
 - Sun River Music Festival which includes hundreds of programs for kids, including arts
 - Prineville Art Walk in the summer; Picnic in the Park with varied musical offerings
 - Prineville Historical Society that earns great community pride with its Museum
 - Lots of highly accomplished photographers in the region
 - Warm Springs Museum that attracts audiences from both Portland and Seattle as well as a lot of bus and school field trips and some International
 - More than 45 galleries and frame shops in the region
 - Several Music Festivals
 - Six Theater companies or venues
 - Three historical museums or societies
 - Two Schools of music
 - Four music venues
 - Six Choirs or singing groups
 - Four Dance companies or studios
 - Art in Public Places programs in several cities and towns in the region
 - Four event venues
 - and many more...
- The region is becoming increasingly attractive to outside businesses:
 - There is a growing number of start-up companies in the area
 - The region has a large potential economic impact from tele-commuting
 - People are migrating to Central Oregon from urban areas – they are very educated and moving to the area for the quality of life
 - “Most of the employment gains here have come from visitors who decided to move their businesses here or to start a business here”
- There is an emerging film industry. BendFilm attracts film-makers and viewers from all over the West Coast. There is talent here that can promote the beauty of the region in a respectful way.
- OSU Cascades is finally up and running:
 - The relationship between OSU Cascades and Bend could be a game changer
 - Up to 5,000 students
 - Open to community partnerships
 - Has a clear Arts and Culture Vision (see Appendix B)
- LaPine City Council has voted to move ahead with a comprehensive ArtsPlan for the city, and to create an Arts Advisory Council. This is a significant development for this community.

- Madras has developed its new performing arts center that is increasingly able to attract Bend arts organizations to present performances as well as groups from outside the region. In addition, it is a quality venue for high school productions.
- Prineville is less a tourism destination than the other larger towns in the region but still has programs, especially in the summer, that provide arts and culture presentations and community arts activities such a Picnic in the Park and ArtWalk.,
- Redmond is increasingly recognizing the value of arts and culture in economic development:
 - There was nothing in Redmond in 2002; before that year all urban renewal funds went to roads; after that, art slowly started popping up.
 - There is still not a lot of art in Redmond but now there is more momentum – now have a Plan – Art in Public Places
- Sisters is increasingly known as an arts and culture mecca and is actively working to support that perception:
 - Currently setting up an Arts District
 - People who have moved to Sisters have often done so because of the major events; have brought small cottage industries
 - Young people trained in Sisters are returning to the area to work in the creative industry
 - During the quilt show all rooms in Sisters, Redmond and Bend are sold out
 - Performers at the Folk Festival often come back though Sisters after the Festival to perform again
 - Sisters Folk Festival is so successful that it has had to limit ticket sales to 4,000 in order to preserve the intimacy of the event; now starting a winter series; the festival is expanding outside its three-day event and bringing back artists for later performances
 - Sisters has always been known as a town that is great for 3-day workshops

Opportunities

As we look to the future there is much about which we can be optimistic for the region:

- More policy-makers recognize the value of arts and culture in creating a sense of community and providing a way for people to connect with others. In addition, there is increased awareness that the arts drive economics.
- Recent forays into Central Oregon by film-makers are increasingly revealing the potential of the area for film and television work. There are more than 70 film-makers working in the region and there could be many more jobs created if there was a consistent interest – creatives, PA's, makeup, EMT's, rock climbers, skiers, hikers, crews...

“Our art and culture commodities from art galleries and museums to theater and dance companies are a catalyst for growth – a growing segment of our region that seems to stem the tide of economic decline.”

Pamela Hulse Andrews

- OSU Cascades will likely be a major player in the region’s arts and culture scene:
 - The arts program is morphing into BA in digital art
 - The OSU Innovation Center will attract and retain new business
- There is the potential to establish a Regional Arts and Culture Council.
- There is increased interest in dovetailing arts and culture with recreation.
- Policy-makers are increasingly relating arts and culture to economic development. Many are looking at individual creative sectors and trying to determine how they can connect to the arts and culture sector for support and help.
- Drake Park would be a fine site for an arts festival.
- Traditional businesses (Law, Financial, Construction etc.) are slowly being taken over by new business clusters (Technology, Bio-tech, Outdoor clothing, Breweries etc.) These are bringing in new creative people, and the question is, how will we reach them?
- According to a recent study by Dean Runyan Associates the average length of stay for visitors to Deschutes County is 2.5 nights with an average daily expenditure per person of \$73.00. In 2015 there were 6,497 overnight visitors. Total annual direct economic impact can be calculated at \$1.2 Billion. Every 1% of growth will produce \$11.8 million in direct economic impact. The secret of economic development is “prolonging the stay” (as one Thought Leader stated.) If just 1% of visitors extended their stay by one day because of arts and culture activities or events, the direct economic benefit would be \$4.7 million – this clearly reveals to potential of arts and culture to positively impact the economic health of the region.
- There is a hunger in virtually all the communities in Central Oregon for a Makers Place – where artists can come together and work on the art, sharing ideas and support. These could also be places for arts organizations to meet, have annual events, exhibits etc. (Refer to Sisters 2011 Next Steps Study)

Note: The Roundhouse Foundation is sending 30 artists to Makers Places around the U.S. to see how it’s done. This has the potential to create many types of jobs: studio managers, teaching artists, administration, concessions staff...

- The cycling community can afford art – there is a cross-over of interest and capacity.
- The Warm Springs Museum has a vision to be an international art and heritage Center, recognizing that a strong link to the tribes is crucial.
- In developing a plan for Central Oregon, it will be vital to look at how diversity is displayed – there is a wonderfully vibrant Hispanic community here that is almost always overlooked.
- Seattle-based and San Francisco-based companies would expand here if there was the right Internet capacity and infrastructure. They would bring jobs and creativity.

- There is a very real cross-over between architecture and the arts; people in architecture usually have another hobby in arts and culture such as fashion design, music, etc. They feed off that connection. Those hobbies could lead to a greater number of people taking on jobs at the intersection of art and architecture (such as interior design, landscape design etc. It should be possible to create more connections with artists to help architects find new ways of working/designing. However, this would need to be done with great intentionality and planning as architects are usually not good collaborators – it’s hard for them to break out of the mold of “this is how we’ve always done it”. Artists can show architects “how to do collaboration.”
- One Thought Leader noted that “It’s hard to bring top-level designers to Bend; arts and culture helps to make it a more vibrant community and more attractive to them”

“It’s so important to have play in your life”
Betty Roppe

Challenges

- At present there approximately 3,000 hotel/motel rooms in Central Oregon per night. Capacity utilization is generally as follows:

January	57%
February	65%
March	70%
April	85%
May	80%
June	95%
July	100%
August	95%
September	90%
October	70%
November	53%
December	56%

- It is very clear from this analysis that there is an abundance of visitors in the summer months and and much greater availability of rooms in the shoulder and winter seasons. This gap has lead to the recent, smartly-conceived 10th Month Campaign. As one Thought Leader said, “Whatever you recommend, don’t suggest anything for the summer!” Many Thought Leaders noted that Bend suffered from “visitor fatigue” over the summer months. At worst, this has lead to some people in the city actually being against tourism in Bend and the surrounding areas.
- Sisters has 250 rooms; with demand for 800 at certain points during the summer months. Accommodation is typically 100% full all summer.
- Currently the area is terribly tilted toward the service industry, which usually does not pay living wage jobs.

- One of Bend’s greatest challenges is that the transportation infrastructure is insufficient to handle the flood of tourists during the summer and there is a real question about how much the infrastructure can support economic development in the region.
- According to several Thought Leaders, the “New Bend” is less supportive than long-time residents. Many are early retirees who have moved to the area with a “close the door behind me” mentality. This clearly causes discomfort at the very least, and hostility and resistance at worst.

“There is a lack of any real collaboration and connection and communication that crosses county lines.”

Kathy Deggendorfer

- Central Oregon is seen as an outdoor recreation playground, and that is how most of the tourism publications represent the area. Central Oregon Visitors Association, for example, is focused on the resorts, and arts is very much on the periphery. For the marketing agencies, arts and culture is very low on the list. And this shows in their publications where less than 10% of the coverage is about arts and culture. In addition, there is a general consensus that most of the publications are “BendCentric.” As one leader put it, “Bend is the 900 pound gorilla” Any regional strategy will need to recognize this issue. In the final analysis, it is clear that the region suffers because there is no-one in a high-profile position who can give a voice to the arts, showing what value they bring to the table.
- The demographics of the regions are changing, with many new start-ups focused in non-traditional industries. Many of the people engaged in those ventures are millennials and high-tech. Several thought leaders noted that “we haven’t yet learned to engage” with those groups. At the same time, there is St. Charles hospital. with more than 40 doctors. There is a general recognition that the medical community could do more to enhance the economic well-being of the region. Having a person who could connect all these dots would be of immense benefit.
- One of the big problems is that the public increasingly expects the arts to be free and the support for the individual arts organizations is not adequate to sustain them.
- Many of the non-profit arts and cultural organizations in Central Oregon are small, with tiny numbers of staff and over-worked, and often under-trained Boards of Directors. Improving Board capacity would help to raise the tide that lifts all boats.

DISCUSSION ON ASSETS, OPPORTUNITIES AND CHALLENGES

According to the Cascade Business News there has been there has been a 200% increase in employment in art galleries, framers and arts organizations in the last 10 years. This growth positions the region well for the future. A commitment to arts and culture is demonstrated by the fact that Bend schools have not had to cut their arts programs, despite the recent prolonged recession. The unrecognized by-product from this is that a significant proportion of the population will grow up being arts literate – something most communities would envy, and a foundational benefit for future generations of arts lovers and arts makers.

A significant player in the arts and culture scene in the region is “Parks and Rec.” In Bend they have agreed to take over the recently-demised ArtsCentral, which perhaps foreshadows the possibility of arts and culture finally being seen as part of recreation.

It's important to recognize arts-based businesses as an important and integral aspect of healthy local economies.

Survey participant

There is no question that the region has a vibrant and largely-healthy arts scene. There are larger organizations that are increasingly earning respect and support. There are scrappy new organizations that are bringing energy and variety. A lot of foundational elements are in place, and now just need to be coordinated and strengthened. The demand is clearly there, and as one Thought Leader said, “Jobs have to expand to support the demand.”

However, there is clearly a lack of coordination, especially in marketing dollars. The region has much to be proud of and brag about – there are “pillars of greatness” in the arts. Those pillars need to be marketed in an intentional, co-operative way. Bend has a great “art vibe” and that can be used as a branding focus. It should be possible to elevate Bend and the region as a cultural destination. Branding should be focused on diversifying the employment base. A key question is: Can the arts and culture brand stand separate from the recreation/outdoor brand?

It has become clear from my discussions with Thought Leaders that there is great awareness, especially with the loss of ArtsCentral, that the region suffers because there is no-one who can speak with authority about the arts and culture, and represent them cohesively to the larger community. Without such a person, how do you get arts to the important tables, and how do you keep it there? Just as there is a need for a single focus in branding the arts and culture vibe of Central Oregon, there is a need for someone to be “the voice” of arts and culture in the region. This would be someone who can reach out to the resorts and bring them to the understanding of the value of the arts in promoting tourism. This would be someone who could co-ordinate all arts and culture activities in the region. This would be someone who would work closely with ACA. It would be someone you could go to if you needed answers on the arts and culture scene on Central Oregon. And in the final analysis, it would be “someone who would beat the drum” as one of the Thought Leaders put it – the Central Oregon Art Czar, or Arts Big Cheese, or Arts Commander, or Arts Commissar, or Arts Concierge, or Arts Magnate, or Arts Lama or Or maybe Arts Guru?

Coordination of marketing and promotion is currently severely hampered because there is no central online calendar. Investing in such a function could pay huge dividends as visitors look for activities in which to participate.

One of the issues that kept popping up throughout my conversations with Thought Leaders is the concept of an Art Center. Many saw this as a creative space, a connecting point, accessible by everyone. It would be a place where passion projects could be produced, a space for collaboration, a place where artists could talk with other artists. It could be a Performing Arts Center or an Arts/Sports Center or simply an Arts Center.

And of course three key questions kept coming up:

1. Where would it be?
2. How would it be paid for?
3. What should it contain?

Through my discussions it became clear that the time is not yet ripe for such a complex center, although as one person put it, "it's closer than it was." For the purpose of this study I am not making any recommendation regarding an arts center because it will take at least 10 years to build the public will, determine the funding sources, identify the needs, recruit a visionary, start and conclude a capital campaign, undertake the extensive design process and complete construction. Such a project is clearly outside the scope of the CORSAC charge which is focused on the next two to three years.

CONSIDERED ACTION STEPS

Many of the Thought Leaders had suggestions as to what might be done to support the region's creative economy. The following are ideas that I considered:

- As International Sculpture festival
- Expand Folk Arts Festival
- A Cervantes (type) Festival (Guanajuato, Mexico)
- Improved Board recruitment and training
- Non-profits capacity building
- An arts innovation center
- Co-operative marketing, advertising
- Branding strategy: market Bend's art vibe
- Arts and Culture czar of Central Oregon
- An Arts Center
- A Big Art Event (e.g., World of Wearable Art) that would keep on giving
- A Cowboy Art Festival
- The Bend Institute for Art Directors
- Promotional video of Bend as a filming destination
- Digital Art Show
- Funding a strategic plan
- Economic analysis of creative arts sector
- Mural Art (e.g., Trompe l'oeil "Bend your Perception")
- Encourage Native American filmmakers
- A coordinated online arts and culture calendar
- Board Training and capacity building
- Redevelopment of the expo center in Redmond
- A school of traditional American Crafts e.g., Penland in N. Carolina
- Re-creation of the Central Oregon Arts Council
- An Arts Makers space (or several throughout the region)
- Consider a United Fund for the Arts (like Portland's Work for Art)

In addition, many of the survey participants also gave suggestions:

- More advertising
- Rent control
- Task Visit Bend to heavily promote cultural events
- Provide free advertising on Visit Bend website for cultural nonprofits
- A large coordinated Studio Tour
- Creating the Creative Arts equivalent of The Ale Trail
- Use Visit Bend dollars to advance the fine arts in Bend; create an advisory board to help them do that
- House artists inside creative businesses - the Portland Institute of Contemporary Art's start up model
- Create an art center
- Technical assistance
- Create an arts initiative that is supported and funded by the City and County government
- Build a performing arts center (minimum seating of 1,000)

Financial support and expertise to market the broad array of talented artists, quality galleries and cultural events

Government and commercial coordinated advertising program

Promotion of individual artists

Help promote the arts in small and rural economies.

Provide stable funding (through beer tax?) to proven cultural nonprofits with strong impact

Funding

Publicity to rest of NW about Central Oregon's creative opportunities

Somehow return First Friday to a true arts scene instead of a party scene.

Encourage more events OUT OF BEND.

Arts district or collaborative space; affordable art space -- studios / offices / venues -- create administrative efficiencies through collaboration, and attract a larger focus on the work of art-making

An entity that is focused solely on promoting arts and culture outside the region.

Cultural tourism signage on highways

RECOMMENDATIONS

Through both the discussions with thought leaders and the input of survey participants, as is shown in the previous section, there were many great ideas generated on how to enhance the region's creative organizations. However, frequently I needed to remind the Thought Leaders that, while supporting arts organizations and individual artists is obviously a good thing, the focus of this study is on creating more employment and enhancing the creative economy.

In the final analysis I believe the growth of jobs in the creative sector will come from the following:

- a) An investment in the infrastructure that ensures people have the information immediately to hand when they are making the decision to visit Central Oregon.
- b) "Prolonging the stay".
- c) Events that "keep on giving".
- d) A robust non-profit sector with strong, committed and trained Boards.
- e) A coordinated system of joint marketing and advertising.
- f) A strongly-branded arts and culture scene.
- g) A continued focus on enhancing the vibrancy of the arts and cultural sector so it is able to continue to contribute to the livability of the region, thereby attracting new businesses and workers to Central Oregon.

In the light of these criteria, I am making the following recommendations:

1. Engage a top level firm to brand the region's arts and cultural vibrancy

As mentioned earlier in my report, there is a great "art vibe" in Central Oregon, but that strength has not been capitalized on through a strong branding program. Bringing in a top branding firm with a robust process will enable the arts and culture sector to be branded as strongly as that of the region's recreation activities.

2. Create a region-wide Cultural Marketing Plan

This is the only way to make a larger statement about the cultural vibrancy in the region.

The marketing plan would have three goals:

- a) To attract more people to the area to participate in arts and cultural activities and events.
- b) To lengthen the stay of current visitors through greater exposure to arts and culture activities.
- c) To attract the kind of workers and industries we want to see here.

In other words, we need to import the economic benefit flowing from a greater investment in the region's arts and culture. A CORSAC investment in the cultural marketing plan could be used, alongside some substantial behind the scenes lobbying, to leverage funding from a variety of other regional and state sources.

3. Create and Fund a Central Oregon Arts “Guru”

The region suffers from the fact that a great many of the arts and cultural activities are not coordinated in any cohesive way. I believe it would be a great benefit for there to be an Art “Guru” for the region – someone who can speak for the arts and culture and make sure that arts and culture are at all the right tables. The position would have the following responsibilities:

- Co-ordinate the region’s arts and culture activities
- Advocate for improved representation in the Central Oregon visitor publications.
- Act as a liaison with local agencies (e.g., ACA, Visit Bend, COVA, ...)
- Help the region’s political leaders to recognize arts based businesses as an important and integral aspect of healthy local economies
- Help promote the arts in small and rural communities
- Oversee the Cultural Marketing Plan
- Connect artists to other elements in the region’s creative economy

4. Fund the creation of a centralized on-line system to gives potential visitors one place to go to get information on all arts and culture events in the region

A centralized arts and culture events database with an on-line portal would enable greater connectivity between all the region’s arts and cultural organizations while making it easier for potential visitors to plan their trip. It would provide access information to the media. It would need to be set up in such a way that the organizers of the events could input updates themselves. An example of a highly suitable system can be viewed at :

<https://phillyfunguide.com/>

5. Set up and fund a Board Training Program for Non-Profits, focused on building capacity

Too many arts and culture nonprofits are underfunded and understaffed, and are governed by untrained and overstressed Boards. Instituting a capacity-building program to enhance the effectiveness of nonprofit Boards in the region would have the double benefit of protecting existing jobs at those nonprofits and creating increased jobs as the nonprofits become more effective in their work.

6. Provide the seed money to allow the exploration of The Big Art Event

The region has a plethora of small scale arts events last from one to three days. These have the benefit of supporting the arts organizations involved, but largely do that through engagement with local residents. Most of those events have remained very static in terms of employment over the last ten years or so, and many of them are staffed by volunteers. Most do not bring in attendees from outside the region. To make a significant difference in employment will require the creation of an event that lasts longer than just two or three days, and is so singular that it has the ability to attract people from outside the region – Portland, Seattle, Eugene, Ashland, San Francisco...) True growth in employment can only come if the event is able to “import” its audience. The event should be something explosively innovative and on a large scale, perhaps using the Central Oregon landscape as an initial inspiration. But it should not stop with just the event itself. The event should be “the gift that keeps on giving”, that has a continuing presence throughout the year (perhaps with a small-scale exhibition center that gives prospective attendees a taste of the event.

Would it be possible to create an Arts Burning Man? Another possibility to explore is the concept of the World of Wearable Art in which designers from all over the world create designs for way-out, fanciful and extraordinary clothes worn at a high level fashion show. Information on such an event is at <https://www.worldofwearableart.com/>

7. Invest in a video that promotes the region’s beauty and talent as a filming destination

Central Oregon has a beauty that is vast, varied and breathtaking. It is ripe for film, television and advertising possibilities. But it is largely unknown. I believe a significant payoff in the way of jobs could result from the creation of a video that could be used to promote the region to mainstream moviemakers as well as to independent film and television producers. Such a video would also speak about the wealth of film talent that is already here. Local film-makers are well-placed to develop and create such a video and several have connections that could ensure its distribution to production decision-makers.

8. Provide the seed money to seriously explore the implications of a city-wide (or region-wide) mural extravaganza

As a rather wild and wooly idea I suggest that CORSAC provide the seed money to examine the possibility of a region-wide series of grand scale murals. This has been accomplished to great effect in Toppenish, Washington, where the town has embraced the concept. The Chamber of Commerce in Toppenish stated unequivocally that their murals were crucial to their economic health. More than 75 large murals have been painted on the sides of buildings throughout the town, always with the theme of the early days of the town. I’m not suggesting something “historic” like that. In fact, I am suggesting the possibility of something out-of-the-ordinary, such as *trompe l’oeil* which would be unique and entertaining. All the towns and cities in Central Oregon could participate and it could well enhance collaboration throughout the region. Obviously many details would need to be worked out (including city ordinances) but the possibilities are exciting.

“We can turn the arts into an economic engine.”
Cristy Lanfri

9. Support the establishment of a Regional Arts and Cultural Council

Central Oregon is clearly hampered through not having a Council similar to those in other counties like Lane, Eugene and the Tri-counties around Portland (RACC). Attempts to create such a council failed in the 70s and 80s, but there is a very different cultural climate in the three-county area today. A regional arts and culture council would enrich the community through:

- Raising the profile of arts and culture
- Acting as an arts advocate
- Generating funding for arts and cultural organizations
- Provide community services such as workshops consulting etc.
- Support arts-in-schools programs
- Compiling job announcements relating to arts and culture
- Being a resource

CONCLUSION

The Central Oregon region has breathtaking beauty and a multitude of outdoor recreation activities. There is a deep pride in the community. However, the vibrant arts and culture scene is wildly under-represented in the material used to promote the area to outside regions. Arts and culture should not be Central Oregon's "best kept secret" any longer. There is no doubt that a stronger branding and promotion of the region's arts and culture activities and events can help to directly improve jobs while also indirectly leading to the creation of jobs and extended hours in associated industries. Coordination of marketing and promotion is currently severely hampered because there is no central online calendar; investing in such a function could pay huge dividends as visitors look for activities in which to participate.

Funding the nine recommendations presented in this report will:

- Go a long way toward giving arts and culture in the region the exposure it deserves.
- Ensure even greater collaboration among arts and culture organizations.
- Lead to significant job growth in both the non-profit community as well as in the for-profit businesses that are involved in work related to arts and culture.
- Enhance the connections between the arts and culture community and other components of the creative economy, which is likely to lead to more jobs.
- Encourage people from outside the area to visit the region to partake of the community's arts and culture activities or to lengthen their expected stay so they can enjoy everything the region has to offer.

Cultural Tourism, as has been clearly established by much research, is increasingly valuable to communities, especially as it has been demonstrated that cultural tourists spend more money per day than those associated with sports and recreation. It's time for the Three Counties to reap the benefits of the the region's abundant arts and culture scene.

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PAUL NICHOLSON

BIOGRAPHY

Mr. Nicholson is Executive Director Emeritus of the Oregon Shakespeare Festival, having held the position of Executive Director from November 1995 until his retirement in December 2012 after 33 years with the company.

A New Zealander, Mr. Nicholson was for six years the Administrative Director of Downstage Theatre, New Zealand's largest and longest-established professional theatre. Prior to becoming involved in professional Theatre, Mr. Nicholson worked for ten years in the corporate world as a planning manager, management accountant and systems analyst.

Mr. Nicholson has a B.C.A Honors (the New Zealand equivalent of an MBA) from Victoria University, Wellington, New Zealand. He has been a guest lecturer at Stanford University, University of Oregon, Mary Baldwin College (Staunton VA), Southern Oregon University, Victoria University of Wellington, the New Zealand Insurance Institute, the New Zealand Department of Trade and Industry, the Oregon Educational Media Association, and the BC Touring Council for the Performing Arts. In the United States he has acted as a management consultant for many non-profit organizations, including the Oregon Ballet Theatre, the William Inge Festival, Roanoke Island (Lost Colony) Historical Association, Shakespeare Santa Cruz, the Tudor Guild, the Southern Oregon Historical Society, Britt Festivals, Rogue Opera, Portland Center Stage and Habitat for Humanity. He continues to consult with the Oregon Shakespeare Festival and is actively involved in arts advocacy efforts for the state of Oregon, serving for many years as president of the Oregon Cultural Advocacy Coalition.

He was a founding faculty member of the Western Arts Management Institute and since 1984 has been an Adjunct Professor at Southern Oregon University. In 1991 he was featured in the PBS series on management, "Nothing Ventured". He has also served on a number of panels for the National Endowment for the Arts and the Theatre Communications Group (TCG). He is a recipient of Concordia University's Vero Nihil Verius Award for Distinguished Achievements in the Arts and the Southern Oregon University's President's Medal and was recognized as one of Oregon's 50 Great Leaders by Oregon Business Magazine. Recently he received the Burbage Award from the American Shakespeare Center and the Mark R. Sumner Lifetime Achievement Award from the Institute of Outdoor Drama.

Active in community affairs, Mr. Nicholson is a past Chair of the Ashland Community Hospital Board of Directors, has served on the board of the Theatre Communications Group and the Ashland Chamber of Commerce, and has participated in many local committees and boards. He serves on the boards of La Clinica Health Center, the Oregon Cultural Advocacy Coalition, Southern Oregon University and on the Board of the Rotary Club of Ashland.

APPENDIX A

CENTRAL OREGON ARTS AND CULTURE ORGANIZATIONS

Name	Employment	Payroll	Activity
Central Oregon Arts and Culture Organizations (and instrument makers)	878	\$22,672,160	
2nd Street Theater/Stage Right Productions			Stage Right Productions
Arts Central			Arts Education
Atelier 6000 Inc, A6			Working studio & gallery BGA
Belfry			Music venue
BendFilm			Promotion of independent film
Bend Park & Recreation Dept			Publicly funded
Cascade Horizon Band Association			Concert band
Cascade School of Music			Music School
Cascades Academy of Central Oregon			Private School
Cascades Theatrical Company			Community theater
Central Oregon Singers			Youth choir
City Club of Central Oregon			Civic club
COSAS NW			Gallery (Folk Art)
Deschutes County Historical Society			Historical association
Glass Dancing Studio			Glass art
High Desert Chamber Music			Chamber music performance
Karen Bandy Studio			Fine art & jewelry BGA
KPOV			Community radio
McMennimin's Old St. Francis School			Music venue
Mockingbird Gallery			Fine art BGA
Oregon Children's Foundation (SMART)			Literacy
Oxford Hotel			Music venue
Sisters Folk Festival Inc			Live music events
SSJ Inc, Sisters Outdoor Quilt Show			Quilt show
Sunriver Music Festival Inc			Classical music series
Sunriver Nature Center & Observatory			Nature Center
The High Desert Museum			History & nature museum
Tower Theatre Foundation Inc			Music and live theater
Volcanic Theatre Pub			Live music, theater, movies
Two Old Hippies (Bredlove & Weber)			Guitar makers
A. R. Bowman Memorial Museum/Crook County Historical Association			Local History Museum
Archaeological Society of Central OR			Preservation and protection
Armature			Art collective, studio, gallery BGA

Art In Public Places Inc		Public art
Art in the High Desert		Juried art festival
Arts & Culture Alliance		Service, coordinating org
Antler Arts		Antler arts and lighting fixtures
Art Adventure Gallery		Local & Northwest artwork
Art in the Atrium, Franklin Crossing		Art exhibitions
Art of Alfred Dolezal		Art gallery
Artists Gallery, The Village at Sunriver		Art gallery, co-cop; 32 artists
Base Camp Studio		Community art studio
Bend Dance Project		Performing Arts
BEAT (Bend Experimental Art Theatre)		Theatre performances, workshops & clas
Bend Genealogical Society		Geneology
Bend Theatre for Young People Inc		Theater classes for young people
Bits and Pieces Custom Framing		Custom picture framing
Bridges to Peace Inc		Portland Street Peace Bridge
Buffalo Horn Gallery		Indian, western & wildlife art
Bunkhouse Studio		Picture framing; fine art sales
C3 Events		Community arts and music festivals
Camp Sherman Historical Society		Historical society
Canyon Creek Pottery		Handmade pottery by Kenneth Merrill
Cascade Chorale/COCC		Choir
Cascade Winds Symphonic Band Association		Symphony
Central Oregon Arts and Cultural Center		Inactive - Art station/Education outreach
Central Oregon Community College Foundation		Foundation
Central Oregon Mastersingers/COCC?		Adult chorale
Central Oregon Songwriters Association		Songwriters Association
Cental Oregon Spinners & Weavers		Spinning and weaving interest group
Central Oregon Symphony Association		Symphony orchestra
Central Oregon Youth Orchestra		Youth orchestra - performances
Cha for the Finest		Art gallery
Childrens Museum of Central Oregon		Hands-on Childrens Musem - Opening so
Christian Heeb Photography		Photographic gallery & workshops
Circle of Friends Art & Academy		Fine handmade art, art classes
Clay Guild of the Cascades		Artists in clay
Clearwater Art Gallery		Art gallery & framing
COCC Art Gallery, Pinkney Center		Art classes and gallery
Cooley's Collection Gallery		Art gallery
Crook County Foundation		Concerts, arts activiteis
Crook County Genealogical Society		Genealogical research
Dance Arts Unlimited		Dance instruction studio
De Wilde Art Glass		Glass studio
Deschutes Public Library Foundation		Library - literary series

Eastlake Framing		Custom framing and consultation
Friends of the Bend Libraries		Library support
Friends of the Crook County Library		
Friends of the Sisters Library		Library support
Friends of the Sunriver Area Public Library		Library support
Galerie Roger		Art gallery - Central Oregon artists
Harmony4Women		Community chorus benefitting 4 girls organizations
Heritage Theatre Company		Education center
High Desert Art League		12 professional artists focused on business art
High Desert Chamber Music		Chamber Music concert series
High Desert Frameworks!		Visual artist exhibitions ??
High Desert Harmonizers Men's Chorus		Barbershop style a cappella harmony group
High Desert Journal		Literary & visual arts magazine
High Desert Society of the Arts		Promotes arts & culture in Central Oregon
High Desert Western Arts Association		Preservation of western heritage
Hood Avenue Art		Fine art gallery- Central Oregon artists
Imagination Gallery		Art gallery - metal sculpture
Jefferson Co Historical Society		Historical association
Jefferson County Arts Association		--
Jefferson County Cultural Coalition		County coalition
Jefferson County Library Association		Library support
Jeffrey Murray Gallery		Photographic Studio BGA
Juniper Branch Family Finders		Family history
Latino Community Association		Festival of Cultures
Lubbesmeyer Fiber Studio and Gallery		Fine art and fiber works BGA
Lumin Art Studio		Contemporary craft & fine art
Madras Historical Airport/ Aircraft Collection		Airplane collection
Madras Performing Arts Center		Performing arts venue
Make Every Day a Painting		Art Workshops in Europe & in the U.S.
Marjorie Wood Hamlin Fine Art Studio		Fine arts, prints and photography
Mary Medrano Gallery		Art gallery & studio
Mike Toth Art		Art works and tattoos Co-op
Mt. Bachelor Quilters Assn		--
Museum at Warm Springs		Native American culture and heritage
OperaBend		Performing arts
PacificArt and Framing		Custom framing
Petersen Rock Garden and Museum		Folk art museum
Phoenix Framing and Art Supply		Art sales and custom picture framing
Piacentini Studio & Gallery		Working studio & gallery BGA
Pillars of Art Pop Up Gallery		Drawings on walls/VisitBend ??
Pine Mountain Observatory		Observatory (U of O) NO
Raku Artistis of Central Oregon		Group of potters. Group & individual instruction

Red Chair Gallery			Fine art BGA
Redmond Community Concert Association			Classical music concert series
Rodes Smithey Studio and Gallery			Visual arts/sculpture/retail store
Sage Gallery			Original works - local art BGA
Sagebrushers Art Society Gallery			Working studio/members' gallery BGA
Scalehouse			Contemporary Arts Center
Sisters Art Works			Workspace for artists; art exhibitions
Sisters Country Historical Society			Historical society
Sisters Gallery and Frame Shop			Gallery featuring local artists
Sisters Organization for Activities & Recreation			Activities and recreation
Stuart's of Bend			Art gallery BGA
Sunriver Art Faire			Fine arts & craft fair
Sunriver Lodge Betty Gray Gallery			Contemporary NW artists
Sunriver Stars Community Theater			Quality community theater
The Framer's Corner			Custom framing; shows work by local art
The Great Frame-up			Custom framing and gallery art works
The Nature of Words			Literary arts (closed May 2014) XX
The Workhouse			Studios, gallery, events BGA
Thompson Studio Glass			Fine art sculptures in glass
Thoroughly Modern Productions			Productions that inspire artists and audi
Tin Pan Alley Art Collection/VisitBend			Public Art collection
Tin Pan Theatre			Movie Theater (available for performanc
Tumalo Art Company			Fine art collective BGA
Ubiquitous Dance Company			Dance company
Victor School of Performing Arts			Classical ballet school; recital hall
Vista Bonita			Glass gallery
Waldorf School of Bend			
Writing Ranch			Classes & retreats for emerging writers
Youth Choir of Central Oregon			Auditioned choirs; Education programs
Self-employed Artists	5	\$219,539	
Adeline Catherine Anderson			Writer
Kymberli Colbourne The Voice of Choice			Professional singer
Jills Wild (Tasteful) Women			Artist
Billye Turner			Art Consultant
Event Venues	9	\$103,597	
River Run Lodge at Eagle Crest, LLC			Events venue
Bend Summer Festival/Bend Fall Festival			Performances, fine arts & crafts
Best of the West Productions LLC			??
Les Schwab Amphitheater			Music venue
Event Services	10	\$345,112	

Star Productions Suntrack Sound Inc Volpe Inc Audio Visions Plus Inc			Event services Event services - sound systems Private entertainment consulting Audio Visual Equipmet services
Film, Video and Television	10	\$237,323	
Clearwater Studios Rage Productions			Film & video prdn; script devlpmnt
BendFilm			Film festival
Central Oregon Film Office SourceOregon Wahoo Films Individuals per BendFilm Database	71	25%	
Instrument Makers (CONFIDENTIAL) - Two Old Hippies moved to Arts and Culture Orgs.			
John Michael Blanchard Jayson Bowerman Rebecca Urlacher			Classical guitar maker Guitar/Mandolin maker Guitar maker
Support Organizations			
VisitBend Arts & Culture Alliance Cascade Business News Bend Cultural Tourism Fund			Tourism support Board Publishing Grant support for arts organizations
Book of Lists Groups			
Arts Organizations			
Arts Galleries			
Event and Meeting Planners			
Framers - Art			
Non-Profit Organizations -Arts			

Vision of OSU| Cascades for Arts and Culture

Vision: OSU-Cascades becomes a regional hub – virtual and physical – for arts, culture and enrichment activities, connecting artists, students, faculty and patrons to increase attention for and influence of the arts.

Highlights:

- OSU-Cascades should be a leader in the arts, setting a high quality standard and willing to take risks. OSU should make a statement, creating an environment for arts and culture that embodies OSU-Cascades' commitment and quality standard: with indoor and outdoor performance spaces, community gathering and showcase facilities, sculpture garden, etc.
- Arts and culture offerings should build organically from the University's current foundation and strengths: today's programs, curriculum, talented faculty: "Grow the programs we already have"; arrange programs and classes that "light a fire" to stimulate students' creativity.
- The curriculum can weave together art with anthropology, history and art history, placing it in a deeper cultural context that enhances learning and connects OSU-Cascades to this region.
- The University must learn to collaborate with the loose-knit network of mostly small non-profit organizations that currently run ACE programs in the region. The main challenge for this local arts scene is the lack of a sustainable funding model.
- To fulfill its mission in Central Oregon, OSU-Cascades will need to be a leader in making arts and cultural experiences accessible and relevant to the people who live here.

**Creative Vitality Suite
2014 Numbers Arts and Culture Sector**

APPENDIX C

Occupations Identified by CV Suite

Occupation (SOC Codes 27-2011 -51-9071)	2014	Avg. Hourly Earnings	Avg. Annual Earnings (at 35 hrs/wk)	Total earnings for Occupation
Historians	12	27.66	\$50,341	\$604,094
Curators	2	\$25.87	\$47,083	\$94,167
Museum technicians	4	\$17.44	\$31,741	\$126,963
Craft artists	107	\$4.98	\$9,064	\$969,805
Fine artists	195	\$7.00	\$12,740	\$2,484,300
Multi-media artists	84	\$10.17	\$18,509	\$1,554,790
Artists and related workers	22	\$10.90	\$19,838	\$436,436
Set & Exhibit Designers	13	\$16.63	\$30,267	\$393,466
Designers, all others	8	\$19.79	\$36,018	\$288,142
Actors	75	\$16.82	\$30,612	\$2,295,930
Producers and directors	50	\$21.03	\$38,275	\$1,913,730
Dancers	25	\$12.48	\$22,714	\$567,840
Choreographers	11	\$18.57	\$33,797	\$371,771
Music directors and composers	102	\$13.22	\$24,060	\$2,454,161
Musicians and singers	364	\$13.75	\$25,025	\$9,109,100
Entertainers and Performers, sports	94	\$14.37	\$26,153	\$2,458,420
Technical writers	26	\$28.30	\$51,506	\$1,339,156
Writers and authors	378	\$14.38	\$26,172	\$9,892,865
Media and communication workers, all other	13	\$23.15	\$42,133	\$547,729
Audio and video equipment technicians	31	\$16.67	\$30,339	\$940,521
Broadcast technicians	20	\$15.41	\$28,046	\$560,924
Sound engineering technicians	11	\$19.89	\$36,200	\$398,198
Photographers	841	\$10.55	\$19,201	\$16,148,041
Camera operators, television, video, and motion picture	21	\$17.05	\$31,031	\$651,651
Film and video editors	20	\$17.05	\$31,031	\$620,620
Media and communication equipment workers, all others	13	\$23.15	\$42,133	\$547,729
Ushers, lobby attendants, ticket takers	50	\$10.85	\$19,747	\$987,350
Costume attendants,	6	\$23.18	\$42,188	\$253,126
Entertainment attendants, and related workers, all other	11	\$11.86	\$21,585	\$237,437
Makeup artists, theatrical and performance	9	\$23.80	\$43,316	\$389,844
Advertising sales agents	155	\$30.13	\$54,837	\$8,499,673
Library assistants, clerical	93	\$13.32	\$24,242	\$2,254,543
Musical instrument repairers and tuners	24	\$14.17	\$25,789	\$618,946
Jewelers and precious stone and metal workers	89	\$14.86	\$27,045	\$2,407,023
	2,979	\$17.01	\$24,645	\$73,418,491

Report to CORSAC

Supporting the Regional Creative Economy

PROCESS

The following elements were undertaken in the preparation of this report:

1. Creation of a database of Central Oregon arts and cultural organizations.
2. Integration of the arts and cultural database with data at the Oregon Employment Department.
3. Development of a survey instrument and subsequent implementation and analysis.
4. Analysis of data in arts and culture database.
5. Identification of selected Thought Leaders and subsequent interviews.
6. Preparation and presentation of Report.

Key Findings

- 168 arts and culture organizations in Central Oregon. 44 of these (26%) are one person businesses.
- 75 are nonprofits (45%).
- 46 of the arts and culture organizations are completely run by volunteers.
- Only 43 of the 168 organizations are covered in the Oregon Employment Department's
- The average payroll per employee is \$25,853 with an average of 21 employees.
- The total payroll for the 122 organizations with employees can be calculated at \$26.8 million.
- There are at least 1,076 employees in the arts and culture sector.
- The arts and culture sector represents approximately one third of the region's creative economy.
- The top 10 employees account for 91% of the employment in the arts and culture sector.
- The total number of organizations in the creative sector is 444, with 38% being in arts and culture.

Survey

168 surveys sent out. 23 Responses (13%).

Quantitative information

Qualitative information

1. Identify the biggest challenge facing them.
2. Suggest two things that could be done to improve the region's creative economy.

Arts & Culture Organizations

	#Orgs	#Empl	Payroll
Covered by Employment Department	43	912	\$23.5M
Not Covered by Department	125	164	\$3.2M
Total	168	1,076	\$26.8M

Non-Arts Creative Economy

Advertising Agencies	34	167
Building Designers/Architects	41	154
Event and Meeting Planners	8	31
Graphic Design Professionals	45	195
Interior Designers	30	96
Landscape Architects	35	235
Landscape Designers	26	244
Media – Magazines	19	139
Media – Newspapers	10	311
Media – Other	4	32
Media – Radio	18	311
Media – Television	5	149
Photography Services	66	107
PR and Marketing	15	97
Publishers	9	62
Web Design and Social Media	35	229
Total Creative Economy excl. A & C	419	2,558

Surveyed Organizations

Finances (most recent year)

Average revenue	\$131,891
Average Contribute income	\$197,371
Average Payroll Expenses	\$120,705
Average other expenses	\$203,840
Average Gain/Loss	\$16,546

Surveyed Organizations

Employment

Total full-time (12 employers)	20
Total part-time (12 employers)	42
Average part-time hours/week	19
Average expected growth in employees (in next five years)	2

Thought Leaders

- Assets
- Opportunities
- Challenges

Thought Leaders

- “Arts and culture are the economic engine of our community”
- “The tourism business has to be convinced of the value of the arts”
- “Our arts and culture are ... are a growing segment of our community that seems to stem the tide of economic decline”

Survey Participants

- “It’s important to recognize arts-based businesses as an important and integral aspect of healthy local economies”
- “Encourage more events Out OF BEND”

Job Growth Will Come From...

- An investment in the infrastructure that ensures people have the information immediately to hand when they are making the decision to visit Central Oregon.
- “Prolonging the stay”.
- Events that “keep on giving”.
- A robust non-profit sector with strong, committed and trained Boards.
- A coordinated system of joint marketing and advertising.
- A strongly-branded arts and culture scene.
- A continued focus on enhancing the vibrancy of the arts and cultural sector

Recommendations

1. Engage a top level firm to brand the region's arts and cultural vibrancy
2. Create a region-wide Cultural Marketing Plan
3. Create and Fund a Central Oregon Arts "Guru"
4. Fund the creation of a centralized on-line system to gives potential visitors one place to go to get information on all arts and culture events in the region
5. Set up and fund a Board Training Program for Non-Profits, focused on building capacity
6. Provide the seed money to allow the exploration of The Big Art Event

Recommendations

5. Invest in a video that promotes the region's beauty and talent as a filming destination
6. Provide the seed money to seriously explore the implications of a city-wide (or region-wide) mural extravaganza
7. Support the establishment of a Regional Arts and Cultural Council

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9. Support the establishment of a Regional Arts and Cultural Council

Conclusion

COIC's Comprehensive Economic Development Strategy (CEDS) 2017-2022

Purpose of the CEDS and COIC's Role

COIC is a Council of Governments and a federally-designated Economic Development District (EDD). As part of the EDD role, COIC prepares a Comprehensive Economic Development Strategy (CEDS) every five years. The CEDS is updated three years after it is completed, and individual strategies or projects can be added or removed at any time at the Board's discretion.

Draft Regional Issues and Strategies

The CEDS process has generated 10 Issues and 25 draft Strategies to date. In early October 2016, COIC staff polled the Strategy Committee members, asking them to indicate their top 3 Issues and top five Strategies. A full description of each Issue, and all of the Strategies and Actions, can be found in the full Regional Issues and Strategies document.

Top 3 Issues:

Housing Affordability and Availability

The availability and affordability of housing is an issue in all Central Oregon communities. The issue is not confined to low-income "affordable housing" but is a growing problem for persons making up to 100% AMI and therefore solutions should address both subsidized as well as market housing.

Top Strategy: Build a Regional Housing Coalition. The coalition would be focused on workforce housing research and analysis; policy advocacy; best practices; regional collaboration to leverage funding; and serving as a regional clearinghouse for housing policies and practices.

Emerging Workforce

Finding ways to better prepare the emerging workforce (young adults) for the current and future workplace was identified in most Central OR communities and at all CEDS Strategy Committee meetings. Needs include "soft skills" such as understanding workplace expectations; academic skills such as math and writing, and hard skills such as technical industry skills.

Top Strategy: Increase the opportunities for 16-24 year olds to gain work experience and career exposure. This is an endorsement of the Better Together Youth CareerConnect Work Plan, which includes a menu of work experience and work exposure activities, establishment of systematic programs at all Central Oregon school districts, and building "talent pipelines" for the key industries identified for the East Cascades workforce area (currently Outdoor Gear and Tech).

Regional Transportation: Movement of People

This Issue addresses the fact that Central Oregon is a large, dispersed region, and residents often must travel from their home communities for work, education and training, health care, shopping, and other essential needs. Transportation funding is not keeping up with the need to maintain and modernize all forms of transportation infrastructure and programming.

Top Strategy: Expand Tools for Non-Single Occupancy Vehicle Travel. 1) Achieve COIC's ORS 190.083 legislative fix to maintain the regional transit system and 2) improve transit to better meet commuter needs. Also: Encourage Development of a State Transportation Funding Package and Project Allocation Performance Measures. This Strategy includes the development of coordinated regional support for a state transportation funding package and reforms to develop performance measures in the 2017 state legislative session.

Other Important Issues:

Economic Development-Related Public Infrastructure

Reflects the need to help local governments develop public infrastructure necessary for economic development and to accommodate and manage growth.

Move-In Ready Commercial and Industrial Buildings; Incubator and Shared Work Spaces

Relates to the fact that most expanding or recruited businesses do not want to construct their own facility and that there is a shortage of existing, move-in ready buildings.

Regional Transportation: Movement of Goods

Relates to the relative isolation of Central Oregon from major markets, the lack of a freeway within the region, and insufficient rail infrastructure (difficulty obtaining access to Class 1 railroads and lack of container transload facilities). The Issue statement also emphasizes the importance of the region's trucking operators and the economic engine role played by the region's five airports.

Broadband Capacity

This Issue originated primarily in the region's rural communities, where many economic development stakeholders expressed concern at the lack of bandwidth and capacity in residential areas particularly. Further, there is currently no assessment of the future broadband needs for the region as a whole.

Rural Community Amenities

Central Oregon's rural communities are interested in developing a host of community amenities – e.g. public spaces like walk-able downtowns, community facilities like pools, and private investments like coffee shops and boutiques – to attract desired business and labor.

Natural Resources: Environmental Assets and Resource Utilization

The natural environment may be the most important part of Central Oregon's economic base. While tourism is a significant component of the regional economy, equally important is the fact that the natural environment, and recreation activities, are a significant draw to business owners and labor. Further, the region is rich in forest, agricultural, and water resources which may be leveraged for business development and jobs.

Regional Coordination and Cooperation

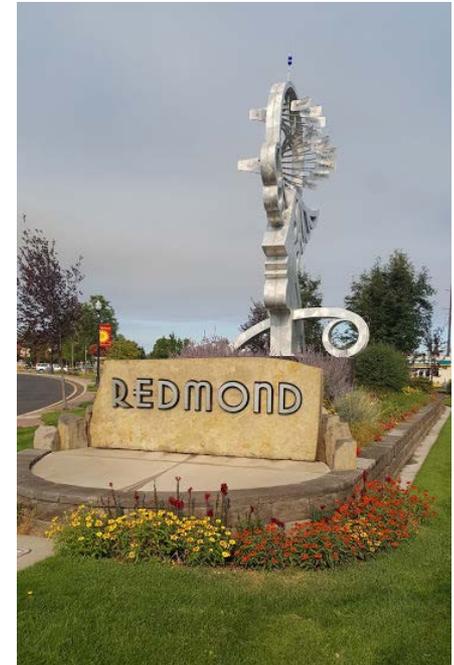
This issue is a lens for how we look at community and economic development in Central Oregon. Our region's economic development priorities and goals cannot be addressed by one organization alone, and often require the integrated effort of many organizations that specialize in different issues – e.g. engaging workforce, transportation, and social service organizations in addressing housing.

Redmond Trends and Economic & Community Development Priorities

City of Redmond

Central Oregon Regional
Solutions Committee

October 25, 2016

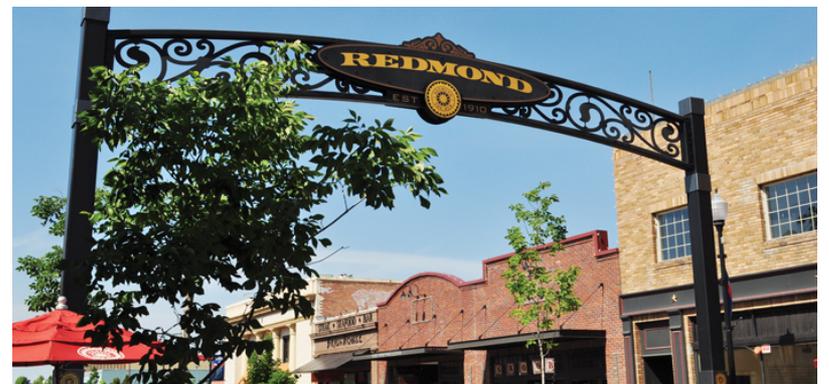
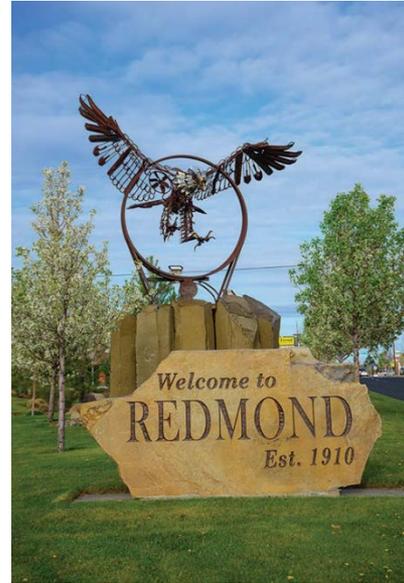


Regional Issues and Redmond

Central Oregon Regional Solutions Advisory Committee priorities were set in late 2015

How does Redmond address these key concerns?

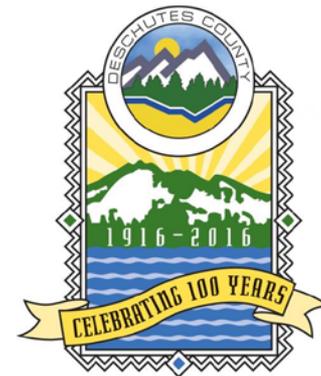
- Retain & grow jobs
- Ensure the region has land & infrastructure available to retain/attract employers
- Enhance Transit
- Improve Sewer Infrastructure
- Leveraging resources through Urban Renewal



Retain & Grow Jobs

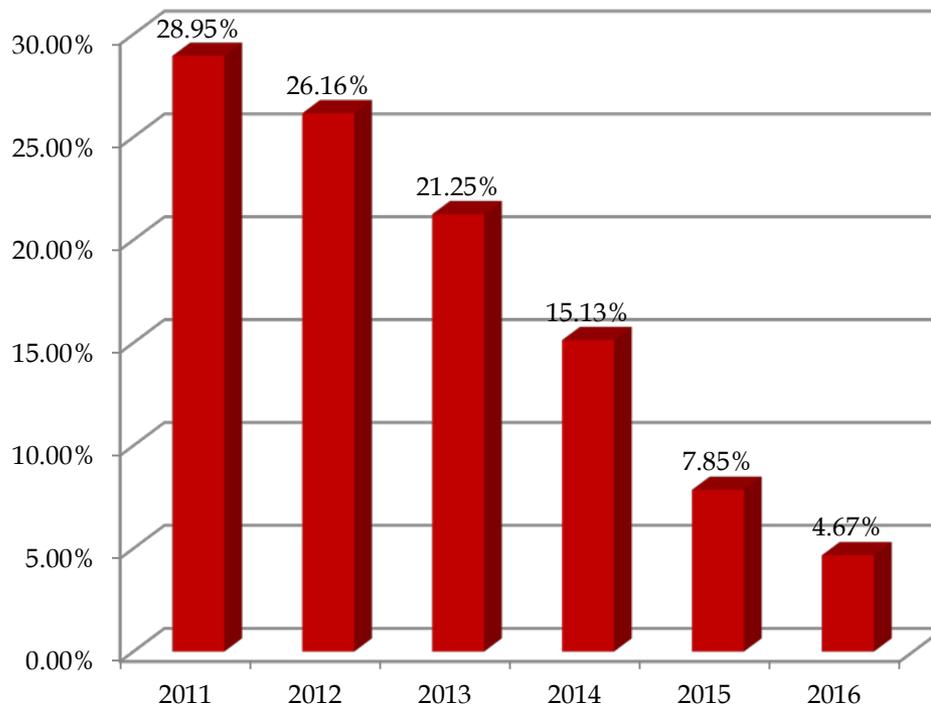
Key Partners & Metrics

- REDI – Industrial and traded sector
- COCC – Start-ups & business programs
- Deschutes County – Job data collection & tracking
- Redmond Chamber – Small business liaison
- City Business License – Business data collection





Redmond Industrial Vacancy Rate Trend



Retain & Grow Jobs

COCC Small Business Development Center

- Business classes-start-ups, developing business plans
- Link to key programs including SBA, Business Oregon
- Partner helping lead the discussing for co-working business incubator in Redmond



CENTRAL OREGON
community college



Retain & Grow Jobs

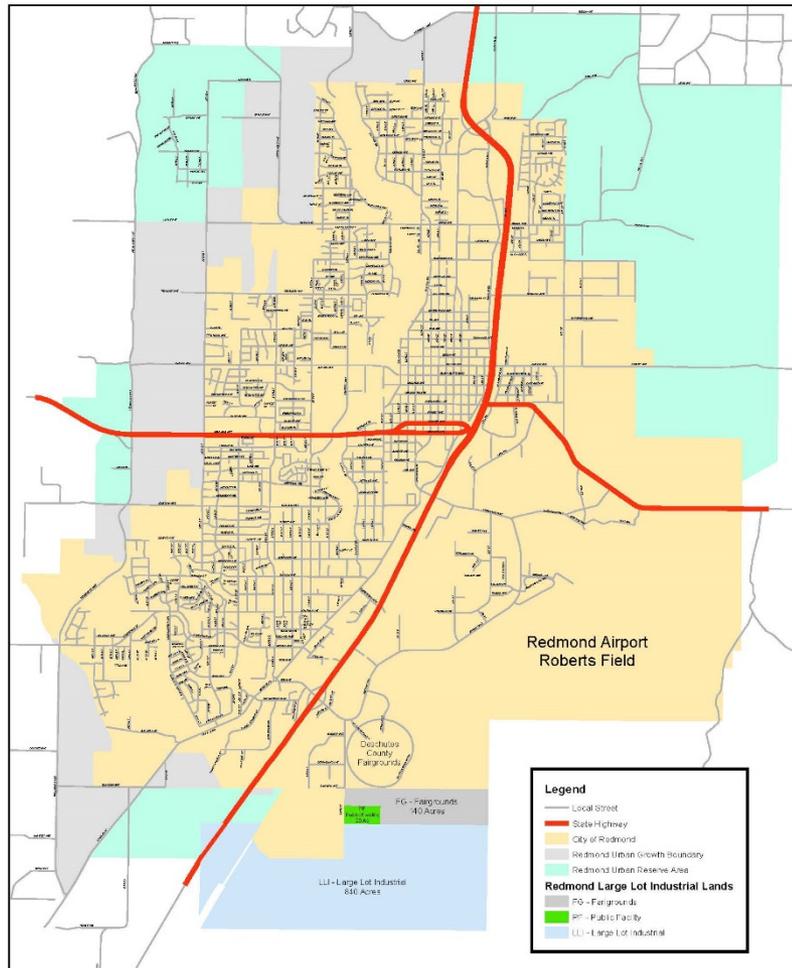
City of Redmond Business License Data

- 2016 Survey resulted in close to 500 respondents
 - **Why Redmond?**
 - Proximity to customers, their home, affordability
 - **Types of businesses**
 - 50% are service commercial
 - **Employees**
 - More than 80% < 10 employees
 - **2017 Expansion**
 - 60% adding employees
 - 25% adding building space



Land & Infrastructure to Attract Employers

Redmond Large Lot Industrial Areas



UGB Expansion - DSL lands - Large Lot Industrial

- Regional response to providing 200+ acres site for large lot industrial development - Redmond is the key area
- Located south of the Deschutes County Fairgrounds adjacent to the Railroad and US Hwy 97



Land & Infrastructure to Attract Employers

UGB Expansion - DSL lands - Large Lot Industrial

- Extensions of utilities from 19th Street will make the site shovel ready.
- Application for UGB expansion includes Plan Amendment/Zone Change to LLI Zone and annexation.
- Application submission expected in January or sooner.

Redmond Infrastructure

- Capacity to serve Comprehensive Plan areas and LLI areas



Enhance Transit

Transit Hub/ Park and Ride

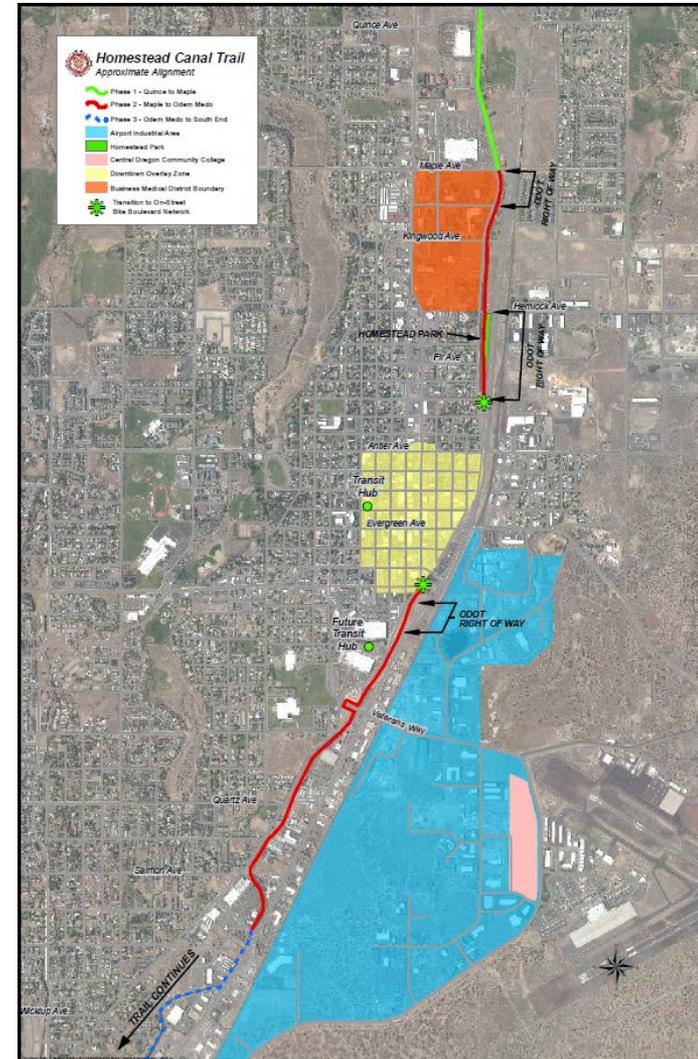
- Relocate regional transit hub & develop park and ride
- Partnering with COIC & Regional Solutions
- Connect VI & Urban Renewal funded
- \$1.5 million facility



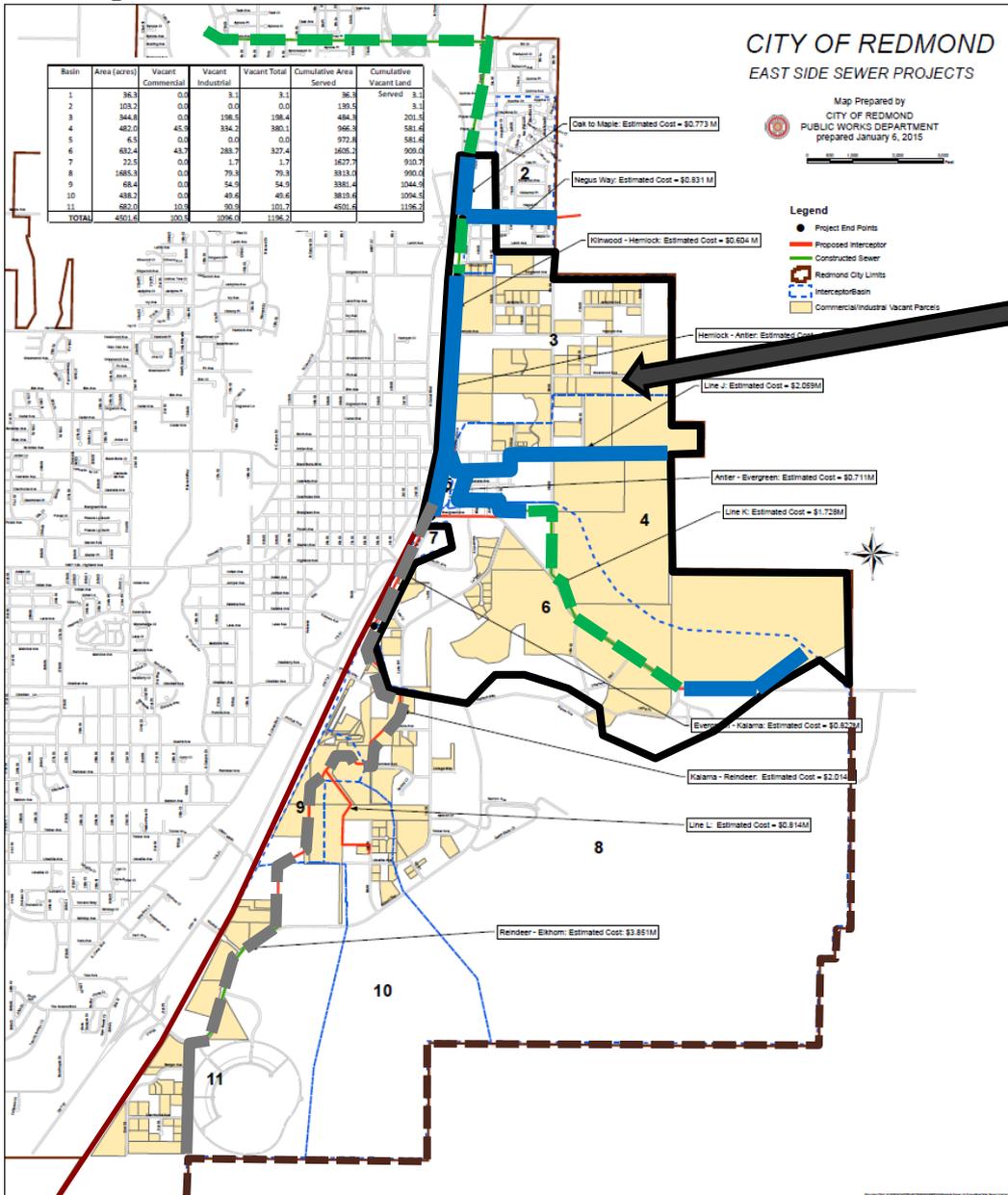
Enhance Transit

Homestead Canal Trail

- Create bicyclist & pedestrian connectivity north/south
- Link up key employment & business sites
- Partnering with Regional Solutions
- Connect VI & Urban Renewal funded
- \$1.2 million project in current phase



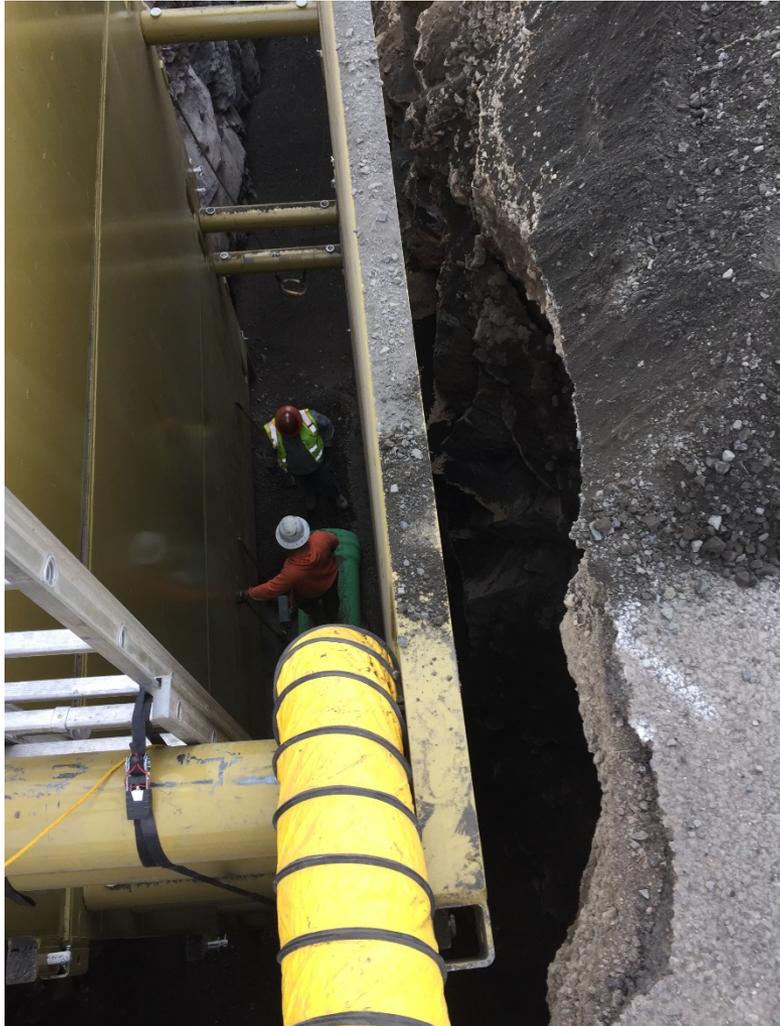
Improve Sewer Infrastructure



- Phase 1 Total
- 1,502 acres served
- Cost: \$6.417M
- Funded by: CWSRF Loan from Oregon DEQ
- Complete August 2017



Improve Sewer Infrastructure



Eastside Sewer Interceptor

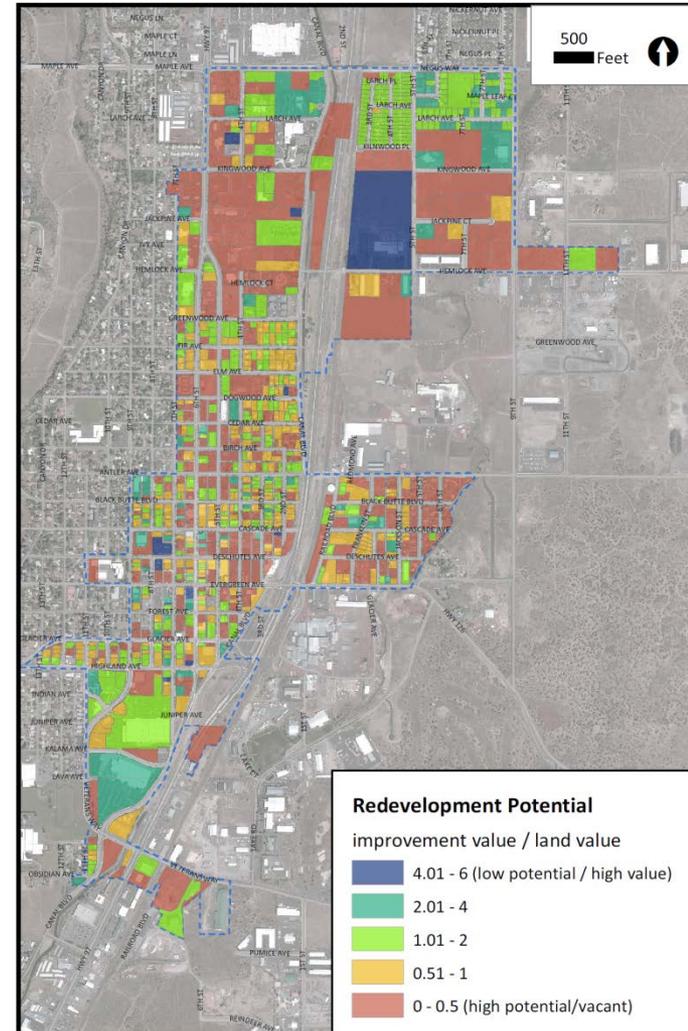
- Work underway now on the north end near NE Oak and 3rd Street.
- 24 feet deep
- Repaid with SDC revenue, not rate payer dollars
- Positions property on the east side for future industrial growth
- Making sure WE ARE READY for development



Leveraging Resources Through Urban Renewal

Urban Renewal Goals

- Remove conditions of blight
- Promote economic development
- Create jobs



Leveraging Resources Through Urban Renewal

Property Assistance Program

- Over 3 dozen active projects
- \$35,000 of project work started in this year alone
- \$282,000 of funding active in the market



Leveraging Resources Through Urban Renewal

Evergreen City Hall

- \$2 million of Urban Renewal investment
- Creates opportunity on existing City Hall site
- Preserves historic building



Leveraging Resources Through Urban Renewal

Planning Processes Lead to Investment!

Mid-Town action plan directs us to engage in market interventions



Leveraging Resources Through Urban Renewal

Mid-Town Redevelopment

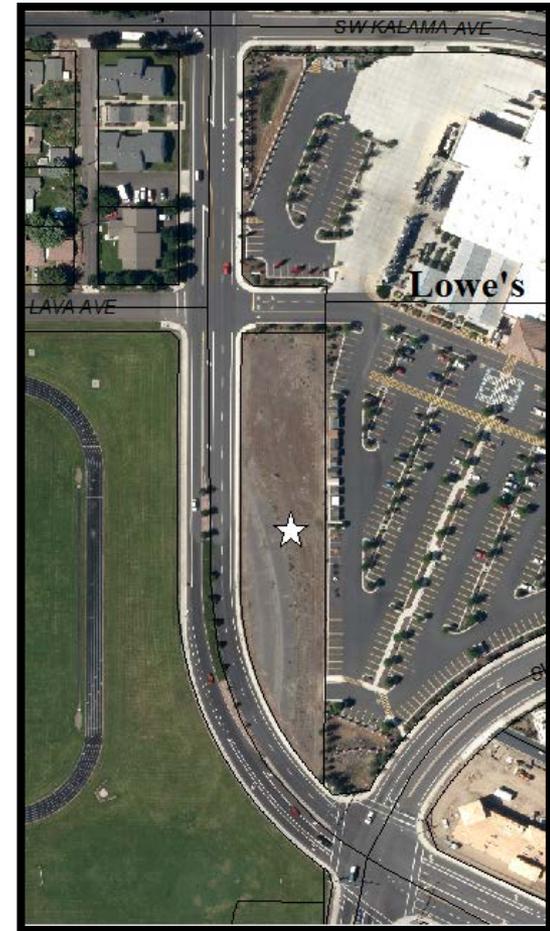
- 5th and Greenwood Property acquired (Ryan's Produce site)
- RFP out soon for mixed use development



Leveraging Resources Through Urban Renewal

Housing Development

- Incentivizing development through loans and buy-down programs
- Low interest loan of up to 20% of construction costs
- SDC buy-down program that provides \$5,000 per unit (minimum of 3 units and a maximum of 30 units or \$150,000)



Questions?

