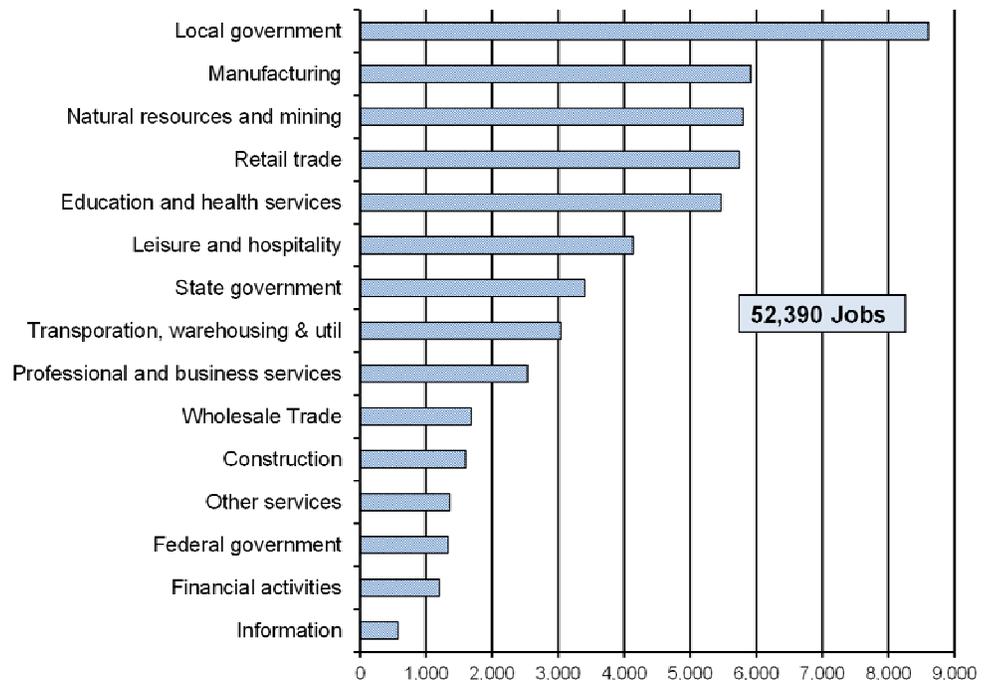


Greater Eastern Region: Industry Facts

The Greater Eastern Region is still recovering from the Great Recession.

- ◆ From 2004-2008, the Greater Eastern Region rose by about 1,420 jobs, an increase of 2.8 percent.
- ◆ In 2009 the Greater Eastern Region lost nearly 1,340 jobs, a drop of -2.5 percent.
- ◆ 2014 Greater Eastern Region employment averaged 52,390 jobs, an increase of about 700 jobs or 1.4 percent in five years (since 2009).
- The Greater Eastern Region was home to 3,604 private industry employer units as of first quarter 2015.
- Umatilla County represented nearly 56 percent of the region's employment, with around 29,250 jobs.
- Malheur County provided about 23 percent of the region's jobs, averaging around 12,170 in 2014.
- Morrow County averaged nearly 5,260 jobs in 2014, about 10 percent of the region's employment.
- The region's 2014 payroll totaled 1.9 billion with an average wage of \$36,356.
- Morrow County's wages averaged \$44,172 in 2014, followed by Umatilla County's \$36,802 and Malheur County at \$32,964.

2014 Employment, Greater Eastern Region



2014 Covered Employment & Payroll, Greater Eastern Region

Industry	Jobs	Units	Payroll	Avg Pay
Total all ownerships	52,389	3,770	1,904,657,152	36,356
Total private coverage	39,048	3,267	1,330,324,720	34,069
Natural resources and mining	5,798	391	178,327,782	30,757
Construction	1,600	234	76,535,804	47,835
Manufacturing	5,916	123	219,157,723	37,045
Wholesale Trade	1,684	163	70,778,958	42,030
Retail trade	5,743	434	146,532,759	25,515
Transp., warehousing & utilities	3,038	150	153,462,026	50,514
Information	574	51	27,460,413	47,840
Financial activities	1,201	282	46,640,814	38,835
Prof. and business services	2,533	309	119,043,213	46,997
Education and health services	5,466	399	200,275,508	36,640
Leisure and hospitality	4,134	360	59,798,642	14,465
Other services	1,361	371	32,311,078	23,741
Federal government	1,330	94	81,905,702	61,583
State government	3,402	98	169,005,062	49,678
Local government	8,609	311	323,421,668	37,568

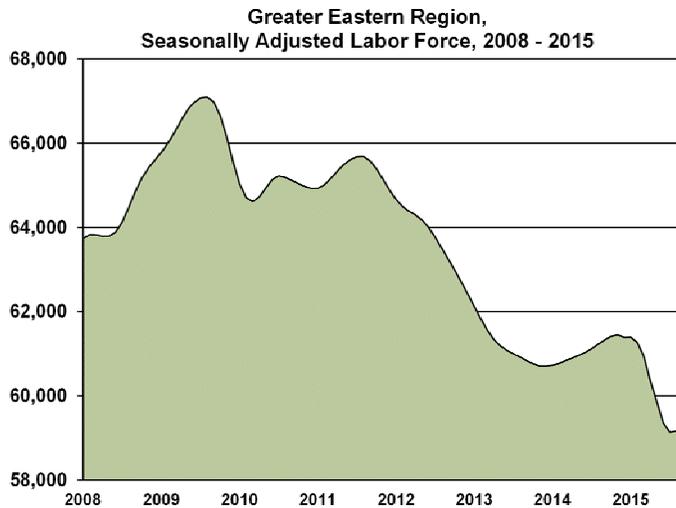
First Quarter 2015 Covered Employment and Wages Size-of-Firm Report

(Private Industry Only)

Number of Reporting Units in Each Size Class

All Size Classes	0 Employees	1-4 Employees	Number of Reporting Units in Each Size Class							
			5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-249 Employees	250-500 Employees	500+ Employees	
Greater Eastern	3,604	521	1,580	706	437	255	61	29	10	5
		51.2%	22.9%	14.2%	8.3%	2.0%	0.9%	0.3%	0.2%	

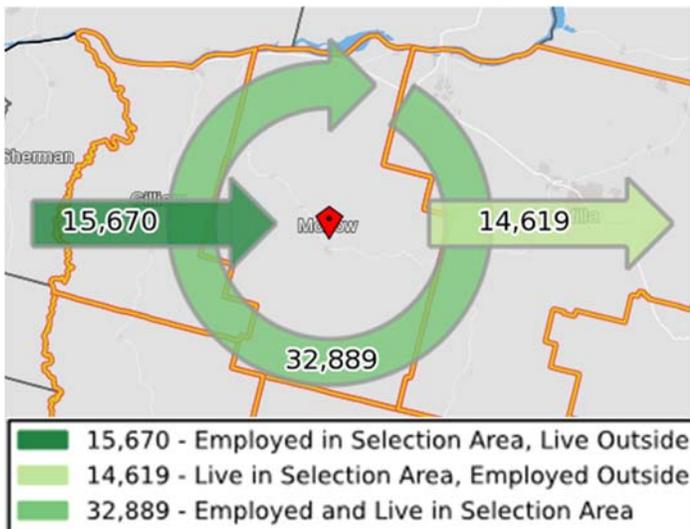
Greater Eastern Region: Workforce & Unemployment



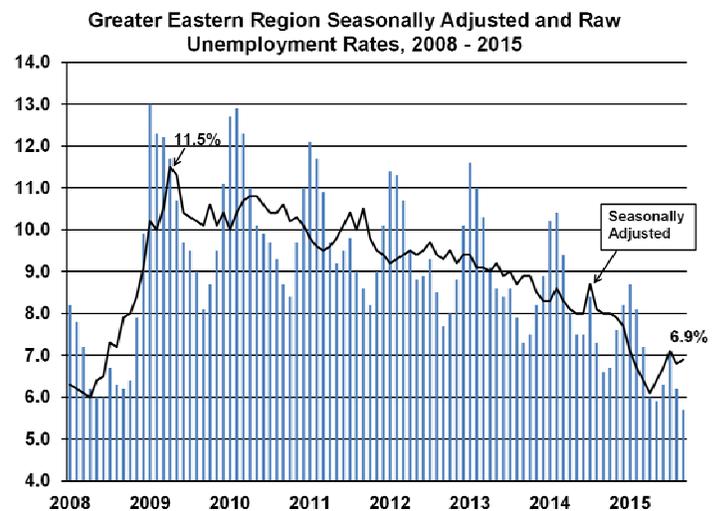
Unemployment Rates remain above pre-recession levels.

- Raw unemployment rates fell to 6.0 percent in mid-2008, averaging 7.1 percent for the year. 2008 seasonally adjusted unemployment rates ranged from 6.0 to 9.9 percent.
- Seasonally adjusted rates peaked at 13.0 percent in January 2009
- In September 2015 the region's seasonally adjusted unemployment rate fell to 5.7 percent.
- The region's labor force fell by nearly 4,500 workers over 2008—2015.

Inflow/Outflow: Greater Eastern Region



Source: Census, On-The Map, 2013



Nearly 68 percent of the region's jobs were filled by residents in 2013.

- 32,889 workers employed by a Greater Eastern business also lived in the seven county region.
- 15,670 workers (32%) commuted to a job in the Greater Eastern region.
- 14,619 resident workers commuted to jobs outside the Greater Eastern region. The region had more jobs than resident workers, with a surplus or gap of 1,051 jobs.
- Well over half (54%) of the workers employed by Greater Eastern businesses in 2013 were 30 to 54 years of age.
- 26 percent of the region's workers were 55 years or older and 20 percent of workers were 29 years or younger.
- 32 percent of the region's workers made more than \$3,333 per month; 46 percent made \$1,251 to \$3,333 per month; and 22 percent made \$1,250 or less per month.

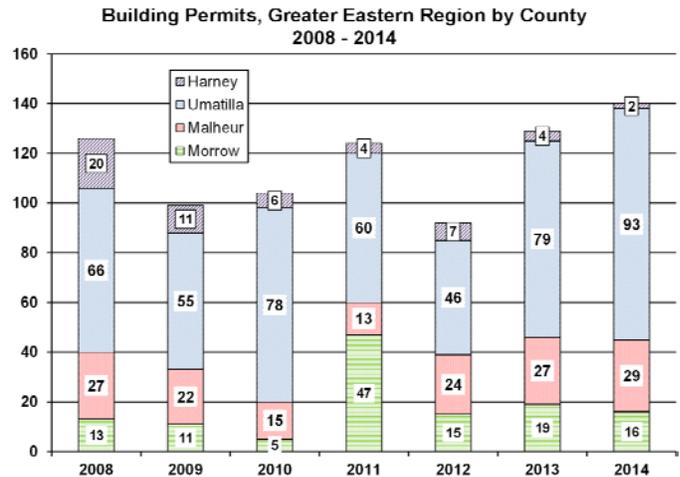
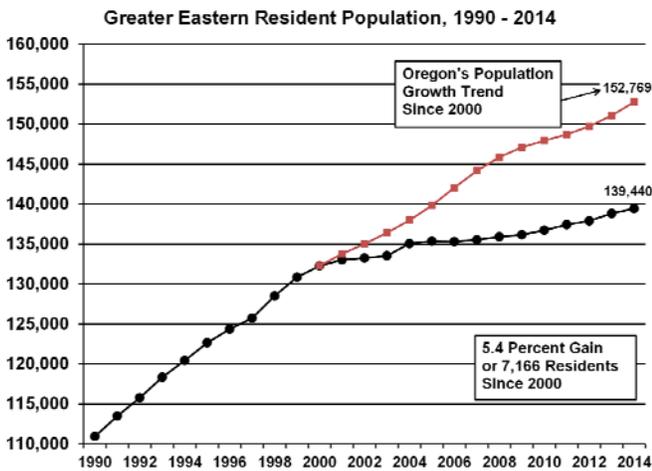
Worker Age

	2013	
	Count	Share
Age 29 or younger	9,850	20.3%
Age 30 to 54	26,299	54.2%
Age 55 or older	12,410	25.6%

Earnings

	2013	
	Count	Share
\$1,250 per month or less	10,715	22.1%
\$1,251 to \$3,333 per month	22,196	45.7%
More than \$3,333 per month	15,648	32.2%

Greater Eastern Region: Population and Households



Components of Population Change for Oregon's Counties: April 1, 2010 to July 1, 2014

Prepared by Population Research Center, PSU, April 2015.

	July 1, 2014 Population Estimate	April 1, 2010 Census Population	Population Change 2010-14	Percent Change 2010-14	Average Annual Change since Census	Births*		Natural		Net Migration 2010-14	Net Migration Per 1,000 Average Annual
						2010-14	2010-14	Increase 2010-14	Per 1,000 Average Annual		
OREGON	3,962,710	3,831,074	131,636	3.4%	0.8%	192,456	140,227	52,229	3.4	79,407	5.2
GREATER EASTERN	139,440	136,554	2,886	2.1%	0.5%	7,840	5,169	2,671	4.9	215	0.4
GILLIAM	1,975	1,871	104	5.6%	1.3%	84	76	8	1.1	96	12.8
GRANT	7,425	7,445	-20	-0.3%	-0.1%	259	349	-90	-3.0	70	2.4
HARNEY	7,265	7,422	-157	-2.1%	-0.5%	336	348	-11	-0.4	-146	-4.9
MALHEUR	31,470	31,313	157	0.5%	0.1%	1,840	1,289	551	4.4	-394	-3.1
MORROW	11,525	11,173	352	3.2%	0.7%	672	337	335	7.5	17	0.4
UMATILLA	78,340	75,889	2,451	3.2%	0.7%	4,606	2,690	1,916	6.3	535	1.8
WHEELER	1,440	1,441	-1	-0.1%	0.0%	43	81	-38	-6.6	37	6.4

Greater Eastern Region Population and Housing

- Great Eastern region population rose by 5.4 percent since 2000, an increase of 7,166 residents to total 139,440. Since 2000, the Northeastern Region lagged Oregon's growth trend by 13,329 residents or an additional 10.1 percent.
- Building permits totaled 140 units in 2014 with 0 multi-family structures and 140 single-family structures.
- Gilliam, Morrow and Umatilla counties 2015 median home sale price was the region's highest, at \$143,500. Although new listings rose by 9.4 percent over the year its current inventory would last just 5.6 months. Closed sales rose by 25.5 percent over the year to total 625.
- Grant County's \$115,500 median home sale price rose by 2.7 percent over the year, while its average, at \$152,900 was essentially unchanged. Closed sales in Grant County rose by a brisk 17.8 percent over the year to total 86 while its current inventory would last only 6.7 months. New listings fell by 21.6 percent over the year to total 116.

Greater Eastern Region October 2015 Year-to-Date RMLS Home Sales

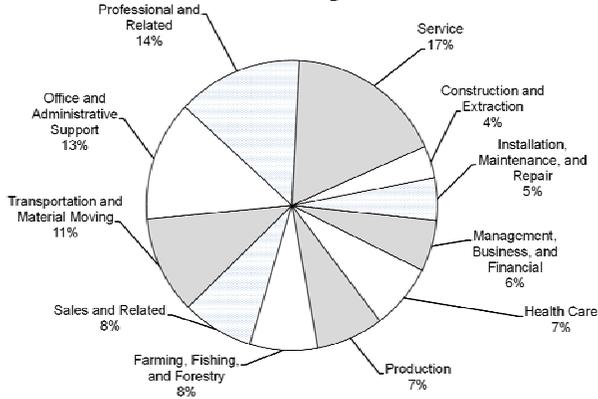
	Inventory in Months	Median Sale Price		Average Sale Price		Closed Sales		New Listings	
		YTD	% Change	YTD	% Change	YTD	% Change	YTD	% Change
Gilliam, Morrow & Umatilla	5.6	\$143,500	2.5%	\$152,900	-0.6%	625	25.5%	977	9.4%
Grant	6.7	\$115,500	2.7%	\$142,800	-5.5%	86	17.8%	116	-21.6%

Housing Units and Costs 2013

	Greater Eastern	Gilliam County	Grant County	Harney County	Malheur County	Morrow County	Umatilla County	Wheeler County	Oregon
Occupied Housing Units									
Owner occupied	31,400	559	2,335	2,020	6,248	2,737	17,051	450	940,143
Owner cost 35%+ of HH Income	23.5%	21.3%	33.5%	21.7%	30.4%	17.4%	21.2%	37.0%	29.9%
Renter occupied	17,161	324	984	1,093	3,888	1,004	9,693	175	576,313
Gross rent 35%+ of HH Income	38.7%	28.7%	29.5%	31.7%	51.6%	43.5%	35.2%	25.2%	45.1%

Greater Eastern Region: Occupations, Education & Wages

Employment by Broad Occupational Group, 2022 Eastern Oregon*



*Baker, Grant, Harney, Malheur, Morrow, Umatilla, Union, and Wallowa counties

Occupations Adding the Most Jobs 2012-2022

1. Combined Food Preparation and Serving Workers, Including Fast Food
2. Truck Drivers, Heavy and Tractor-Trailer
3. Farmworkers and Laborers for Crops, Nurseries, and Greenhouses
4. Retail Salespersons
5. Farmworkers, Farm, Ranch, and Aquacultural Animals
6. Customer Service Representatives
7. Laborers and Freight, Stock, and Material Movers, Hand
8. Agricultural Equipment Operators
9. Janitors and Cleaners, Except Maids and Housekeeping Cleaners
10. Graders and Sorters, Agricultural Products

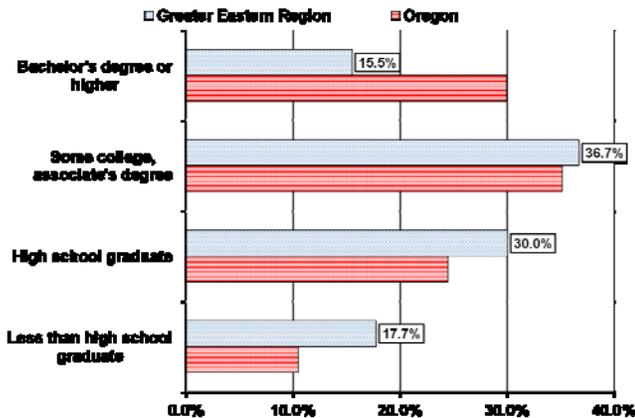
Greater Eastern: Occupations, Education & Wages

- High school graduate was the highest level of educational attainment for 30.0 percent of Greater Eastern region residents (25 years and older), well above Oregon's 22.2 percent. Residents with less than a high school diploma made up 17.7 percent of the region's population compared with a much lower 10.6 percent in Oregon.
- Only 15.5 percent of the region's population held a Bachelor's degree or higher in 2013, compared with Oregon's 29.9 percent. Residents with some college were the largest group, at 36.7 percent, just above Oregon's 34.5 percent.
- Umatilla County represented about 58 percent of the region's employed civilian population age 16 and over.
- Health care related occupations represented seven of the top ten Eastern Oregon wages in 2015.
- Food preparation and serving workers is projected to add the most jobs over 2012-2022, with four farming occupations also making the top 10.
- Service occupations are projected to represent 17 percent of the region's 2022 employment, followed by professional and related at 14 percent and office and administrative support with 13 percent.

Top 2015 Wages in Eastern Oregon

Occupational Title	2015 Annual Mean
Family and General Practitioners	214,180
Nurse Anesthetists	162,001
Dentists, General	153,307
Pharmacists	126,581
Optometrists	115,755
Architectural and Engineering Managers	110,791
Chief Executives	108,184
Judges, Magistrate Judges, and Magistrates	99,992
Physician Assistants	94,695
Nurse Practitioners	92,360

Educational Attainment: 2013 Population 25 years and over



Fastest Growing Occupations in the Greater Eastern Region (10 or more Employed) 2012-2022

1. Crane and Tower Operators
2. Insulation Workers, Floor, Ceiling, and Wall
3. Physical Therapist Aides
4. Tour Guides and Escorts
5. Physical Therapist Assistants
6. Pest Control Workers
7. Roofers
8. Separating, Filt., Clarif., Precip. & Still Mach. Setters, Ops., & Tenders
9. Computer-Controlled Machine Tool Operators, Metal and Plastic
10. Painters, Construction and Maintenance

2013 Occupational Employment

Occupations	Greater Eastern Oregon	Gilliam County	Harney County	Grant County	Malheur County	Morrow County	Umatilla County	Wheeler County	Oregon
	Civilian employed population 16 years and over	55,055	887	3,083	2,924	10,773	4,770	32,047	571
Management, business, science, and arts	27.7%	22.1%	36.6%	31.5%	28.9%	24.9%	26.6%	36.3%	36.5%
Service occupations	20.2%	12.1%	21.4%	22.8%	21.6%	15.2%	20.4%	16.6%	18.3%
Sales and office	19.8%	21.2%	15.0%	21.9%	19.8%	15.9%	20.6%	16.6%	24.2%
Natural resources, construction, and maintenance	16.6%	22.3%	19.3%	13.9%	16.1%	24.9%	15.2%	20.5%	9.1%
Production, transportation, and material moving	15.8%	22.3%	7.8%	10.0%	13.7%	19.1%	17.1%	10.0%	11.9%

September 2014
Greater Eastern Oregon Regional Solutions Advisory Committee
Priorities and Regionally Significant Projects

Increased Productivity from Federal Forest Lands

Policy and resources to improve forest health and sustain/grow rural economies
Develop technology for biomass utilization

Skilled Workforce Availability

Increase availability of training/certification programs
Increase vocational/career technical education availability
Address interstate certification reciprocity issues
Address community livability issues
Commercial kitchens to support rural entrepreneurship

Avoid/Mitigate Sage Grouse Endangered Species Act Listing

Resources to avoid sage grouse listing or mitigate impacts of listing

Water Management and Development

Water storage projects
Infrastructure/distribution systems in critical groundwater areas

Infrastructure to serve industrial sites

Funding for infrastructure to support Umatilla Chemical Depot redevelopment
Preserve rail infrastructure to Pilot Rock

Unmanned Aviation Vehicle Industry

Support regional test site(s)

Marketable Industrial Land

Funding and technical assistance to ensure a supply of marketable industrial lands

Workforce Housing

Create a housing loan fund to assist with market rate rural housing financing
Address appraisal (lack of comparables) issues for rural market rate housing financing
Funding for housing rehabilitation

Regulatory Technical Assistance

Increase technical assistance to local governments on land use planning and infrastructure upgrades

Mining/Metals Extraction

Streamline permitting process
Assessment of regional mineral resources

FEMA National Flood Insurance Program Changes

Investigate opportunity for local/state insurance pools

Regional Solutions Team – Proposed Regional Priorities for Advisory Committee Consideration

Support Natural Resource Economy

- Drought resilience
- Bio-energy
- Forestry
- Agriculture
- Mining
- Etc.

Marketable Industrial Land

- Supply to meet region needs
- Infrastructure development to make sites development ready
- Multi-modal movement of goods and services
- Etc.

Skilled Workforce

- Training and certifications
- Attraction and retention
- Housing availability
- Community amenities
- Etc.

Governor’s Vision Statement

Oregonians succeed in vibrant communities that offer opportunities for all individuals to engage their full potential. A thriving Oregon is resilient and sustains the well-being of current and future generations.

FOCUS AREAS & INITIATIVES	STRATEGIES	METRICS
<i>Seamless System of Education</i>		
A. Ensure graduates are prepared for their future	1. Partner with higher education to engage student interns on Regional Solutions projects and/or in Regional Solutions Centers	Number of Regional Solutions projects where student interns participate
<i>Excellence in State Government</i>		
A. Oregonians have access to government and representatives	<ol style="list-style-type: none"> 1. Promote local access to state government via the 6 Regional Solutions Centers and 11 Regional Solutions Teams located throughout Oregon 2. Invite additional state agencies to locate staff in Regional Solutions Centers 3. Schedule Regional Solutions Team community outreach meetings on a regular basis 4. Regional Solutions Advisory Committee meetings are open and accessible to the public 5. Pilot the Agora platform to enable better connections between private, public, and philanthropic resources to produce effective community and economic development projects (North Coast, North Central, Central, Northeast Oregon and Mid Valley regions) 	Local government officials and staff rely on RST to address multi agency priorities and align regulatory processes
B. Accountability and transparency	<ol style="list-style-type: none"> 1. Post Regional Solutions Advisory Committee meeting notices, agendas, and materials at least 14 days in advance on website and post meeting minutes 2. Regional Solutions Teams track their work to demonstrate progress toward the completion of projects that respond to regional priorities 3. Update the Regional Solutions project report twice a year 4. Update and maintain the Regional Solutions website 	People have access to agendas and materials 5 projects or milestones completed per region each year
C. Unified, coordinated, connected agencies that maximize public resources along with non-agency partners	<ol style="list-style-type: none"> 1. Regional Solutions Teams <ol style="list-style-type: none"> a. coordinate state resources to solve problems and address regional priorities b. coordinate and align regulatory requirements for projects that involve multiple agencies (e.g. Red Rock biofuels, small port marina dredging, Calico Resources, Inland Ports Strategies, etc.) 	

GOVERNOR'S REGIONAL SOLUTIONS PROGRAM – ACTION PLAN – DRAFT 02/18/2016

FOCUS AREAS & INITIATIVES	STRATEGIES	METRICS
	<ol style="list-style-type: none"> 2. Identify opportunities to engage Oregon Consensus, the state's conflict resolution program, and Oregon Solutions, the state's collaborative implementation program, for community problem solving 3. Present Regional Solutions Team activity summaries to state agency commissions/boards 	
<p>D. Foster a culture of excellence in employees</p>	<ol style="list-style-type: none"> 1. Regional Coordinators and team members create an atmosphere of creativity to seize opportunities and remove barriers 2. Celebrate success and excellence; identify opportunities for recognition 3. Regional Solutions Teams have access to collaboration training 4. Review the Regional Solutions Key Performance Measure: Percent of participants who rate the Regional Solutions process very good to excellent (Measured via a Customer Satisfaction Survey – Performance ratings for accuracy, availability of information, expertise, helpfulness, timeliness, and overall quality of services) 	<p>Key partners continue to rate Regional Solutions as very good or excellent (Measured via a Customer Satisfaction Survey – Performance ratings for accuracy, availability of information, expertise, helpfulness, timeliness, and overall quality of services)</p>
<p><i>A Thriving Statewide Economy</i></p>		
<p>A. Create conditions for business to grow – grow our own</p>	<ol style="list-style-type: none"> 1. Governor appointed Regional Solutions Advisory Committees leverage state (along with private, public, and philanthropic) resources to address priorities and solve problems in each of the 11 regions. Resources are: technical assistance, capacity and state funding opportunities. Committees <ol style="list-style-type: none"> a. identify and review regional economic and community development priorities on an annual basis b. connect local resources to projects that address the priorities c. recommend priority implementation projects for state funding 2. Empower Regional Solutions Coordinators and Teams to <ol style="list-style-type: none"> a. coordinate state resources to solve problems and address priorities b. serve as ombudspersons to help navigate state regulatory processes; coordinate and align regulatory requirements for projects that involve multiple agencies c. support community-based efforts to improve preparedness for economic development, including long-range community planning efforts 4. Complete Regional Infrastructure Fund rulemaking 5. Create opportunities to ensure that investments support diverse communities including traditionally underserved populations 	<p>Complete 5 projects (or milestones) per region per year.</p> <p>Complete priority implementation projects that support job retention and creation and leverage other resources; document resources leveraged and relationship to job retention/creation.</p> <p>Obtain funding for Regional Solutions priority implementation projects in 2017</p> <p>Regional Solutions Teams regularly attend LOC regional <i>Small Cities Network</i> meetings</p> <p>Funding and staff resources invested in Regional Solutions projects</p>

GOVERNOR'S REGIONAL SOLUTIONS PROGRAM – ACTION PLAN – DRAFT 02/18/2016

FOCUS AREAS & INITIATIVES	STRATEGIES	METRICS
	<ol style="list-style-type: none"> 6. Work with the federal delegation to incorporate the resources and regulatory assistance of federal agencies in addressing priority projects and recommend system improvements 7. Recommend system improvements to improve the effectiveness of state and federal processes 8. Support local workforce investment boards and sector strategies by responding to needs/opportunities 9. Support the Priority Business Initiative by engaging RST members in appropriate follow up 	RSTs effectively address multi agency issues that arise through the sector strategies and Priority Business Initiative
B. Expand affordable and available housing	<ol style="list-style-type: none"> 1. Where identified as a priority, look for opportunities to connect state resources with housing providers (e.g., ODOT surplus property) 2. Where identified as a priority, support partnerships to better understand opportunities to expand housing options 	
C. Quality job creation/Growing middle class	<ol style="list-style-type: none"> 1. Support regional projects that create quality jobs, e.g., Klamath IDEA, RAIN 2. Leverage resources to increase the supply of available industrial and employment lands 	Increase in shovel ready employment/industrial lands
<i>Healthy, Safe Oregonians</i>		
A. Responsive and prepared in emergencies	<ol style="list-style-type: none"> 1. Work with the Association of Oregon Counties/League of Oregon Cities on establishing the sister counties/communities program 2. Participate in recovery efforts for state or federally declared disasters 3. In local emergencies, serve as a link between the community and the Governor's office, e.g., fires, flood, mass shootings, mass protests 4. Work with the Governor's Resilience Officer to coordinate seismic safety and resilience planning and preparation by state agencies and communities 	



GOVERNOR KATE BROWN

2016 Agenda & Priorities

A Seamless System of Education

- Establish the Education Innovation Officer charged to improve Oregon's high school graduation rate.
- Create the Governor's Council on Educator Advancement: Executive Order establishes the Governor's Council on Educator Advancement, charged with coordinating comprehensive support to deliver excellence in teaching through leadership development, mentorship and best practices.

A Thriving Statewide Economy

- Support small business:
 - Legislation to expand the Office of Small Business Advocate to help small businesses navigate state and local policies and procedures.
 - Governor's Small Business Advisors: Executive Order creates a diverse advisory group to develop recommendations to support Oregon small businesses, such as increasing access to capital and streamlining state agency processes.
- Legislation to increase the minimum wage.
- Legislation to continue the expansion of affordable housing issues statewide.

Excellence in State Government

- Accountability and Transparency:
 - Legislation creates a technical ombudsman in the Department of Administrative Services to assist state agencies with large electronic public records requests.
 - Executive Order requires all agencies to comply with current law requiring state agencies to have a public records policy in place; DAS to implement the 2015 audit recommendations, including uniform statewide standards.
 - Legislation tightens deadlines by which lobbyists must disclose/register clients with the Oregon Government Ethics Commission (OGEC), and requires OGEC to make that information available online within two days.

Healthy, Safe Oregonians

- Establish the Governor's Campus Safety Working Group.
- Umpqua Community College funding proposal – funds to enhance safety on the UCC campus.
- Harney County funding proposal – funds to offset expenses incurred during the occupation of the Malheur Wildlife Refuge.

Responsible Environmental Stewardship

- Appointment of State Resilience Officer.
- Drought package funding proposal – funds to help local communities plan for and address persistent drought.
- Wildfire funding proposal – funding to cover costs incurred during the 2015 wildfire season.