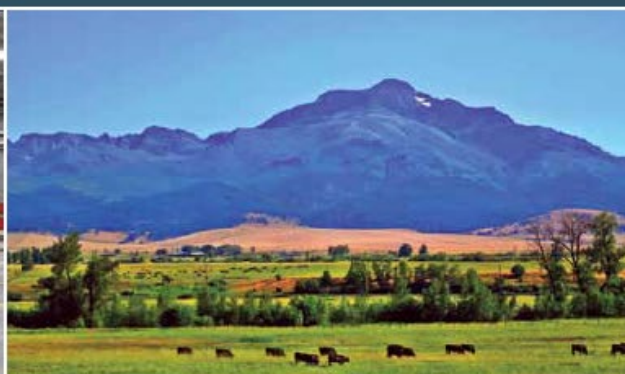


2023 GEODC Comprehensive Economic Development Stakeholder Survey

Greater Eastern Oregon Development Corporation

Bringing prosperity to everyone in the Greater Eastern Oregon Development Corporation District



January 2024

Final Report

Prepared for
Greater Eastern Oregon Development Corporation
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Pendleton, Oregon 97801

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About the Institute for Policy Research and Engagement

The Institute for Policy Research & Engagement (IPRE) is a research center affiliated with the School of Planning, Public Policy, and Management at the University of Oregon. It is an interdisciplinary organization that assists Oregon communities by providing planning and technical assistance to help solve local issues and improve the quality of life for Oregon residents. The role of IPRE is to link the skills, expertise, and innovation of higher education with the transportation, economic development, and environmental needs of communities and regions in the State of Oregon, thereby providing service to Oregon and learning opportunities to the students involved.



About the EDA University Center

The University of Oregon Economic Development Administration University Center is a partnership between the Institute for Policy Research and Engagement, RAIN @ UO, the Lundquist Center for Entrepreneurship, the Oregon Business Consulting Group, and UO faculty. The UO Center provides technical assistance to organizations throughout Oregon, with a focus on innovation, entrepreneurship, and rural economic development. The UO Center seeks to align local strategies to community needs, specifically with regards to building understanding of the benefits of sustainable practices and providing technical training to capitalize on economic opportunities related to those practices. The EDC is partially funded through a grant from the U.S. Department of Commerce, Economic Development Administration.

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Summary

The Greater Eastern Oregon Development Corporation (GEODC) is among the largest Economic Development Districts in the country. The district consists of seven counties and thirty-nine incorporated cities which make up a large and diverse region with differing needs across communities.

In 2014 GEODC released the 2014-19 Comprehensive Economic Development Strategy (CEDs) update. Now, GEODC and IPRE are looking to update the CEDs with contemporary data. As part of the evaluation process, GEODC partnered with the University of Oregon Institute for Policy Research and Engagement (IPRE) to collect stakeholder feedback that will inform the upcoming 2024 CEDs update.

IPRE developed and administered an online survey to key stakeholders throughout the GEODC in the Fall of 2023. A total of 128 individuals participated in the survey. As a scoping effort, the survey intended to assess the perspectives of key stakeholders in the region to help inform the CEDs update. This survey was built on the original version and included some new attributes that were expressed by respondents from the 2019 survey. The survey cannot be inferred to reflect the perspectives of all individuals in the region.

Survey Respondents Characteristics

IPRE received 128 responses from members in all seven counties.

- Responses were distributed across the region with three counties: Umatilla (34%), Grant (22%), and Harney (12%) representing the largest share.
- The majority of respondents (61%) were affiliated with a government entity of some type with the next largest representation being nonprofit at 20%.
- The largest share of respondents (43%) indicated they were Very Active in economic development. Slightly Active (24%) and Somewhat Active (24%) were an even split. Only 9% indicated they were not active.

General Perceptions

- **Economic Development is Important to Stakeholders in the Region.** 89% of stakeholders believe that economic development is very important or extremely important to their region. This number is slightly down from ninety-two percent in 2019.
- **A significant share of stakeholders were unfamiliar with the CEDs.** Close to half (45%) of respondents indicated that they were unaware of the GEODC Comprehensive Economic Development Strategy (CEDs) document before receiving the survey. This number was 4% lower than in 2019.
- **Around half (47%) of respondents indicated they had used the CEDs in their economic development activities.** Of those, 40% found it extremely or very useful, 41% found it moderately useful, and only 13% found it slightly useful. Only 2 respondents (5%) indicated it was not at all

useful. These numbers show improvement from 2019 where only a third found it extremely or very useful.

- **A significant number of respondents believe that the region is currently unequipped to withstand or recover from a shock.** 49% of respondents strongly disagreed or disagreed that the region has the ability to recover or withstand a shock. Close to a third (32%) agree that it can, while 19% neither agree nor disagree.
- **A majority of respondents feel that their communities are not economically resistant enough.** A large number of stakeholders believe that their communities lack proper infrastructure systems (45%), business continuity plans (60%), strategies to support supply chains (52%), and integration with other local, regional, and state planning activities (48%) to properly weather emergencies and disasters.

Regional Goals

Respondents agreed that all listed goals were important to include in the 2024-2029 CEDS update. No goal received a disagreement higher than 3%. The most popular goal was *Support the Needs of Rural Areas* with 94% of respondents selecting strongly agree or agree. This was followed by *Advance Economic Development Activities that Provide a Range of Employment Opportunities* with 93% of respondents also selecting strongly agree or agree. The rest of the goals were ranked as follows:

- Support Infrastructure Assistance to Communities: 92%
- Provide Technical Assistance to communities and support capacity-building efforts: 89%
- Foster Collaboration on Projects of Regional Significance: 88%
- Partner on Efforts to Increase Availability of and Access to Broadband: 84%
- Partner to Improve Workforce Training and Education: 82%
- Build on the Region’s Entrepreneurial Culture and Assets: 80%
- Strengthen the Region’s Resilience against Climate-Related Impacts through Resilience and/or Mitigation Projects: 55%

Some other goals that respondents mentioned should be included are:

Workforce/Housing Development: There is a desire to address the intertwined challenges of workforce and housing availability in the GEODC region. The focus should be on prioritizing workforce housing, considering goals for recruiting individuals and supporting rural communities by repurposing existing infrastructure for sustainable development.

Collaboration: Collaboration needs to be expanded. GEODC communities need to have their individuality and unique needs recognized while also promoting targeted strategies for flexible and equitable development based on the specific opportunities and challenges in different communities.

SWOT Analysis

The survey included several statements grouped into categories that respondents were asked to rate as strength or weakness or as an opportunity or a threat. This data is intended to inform a regional SWOT (strength, weaknesses, opportunities, threats) analysis.

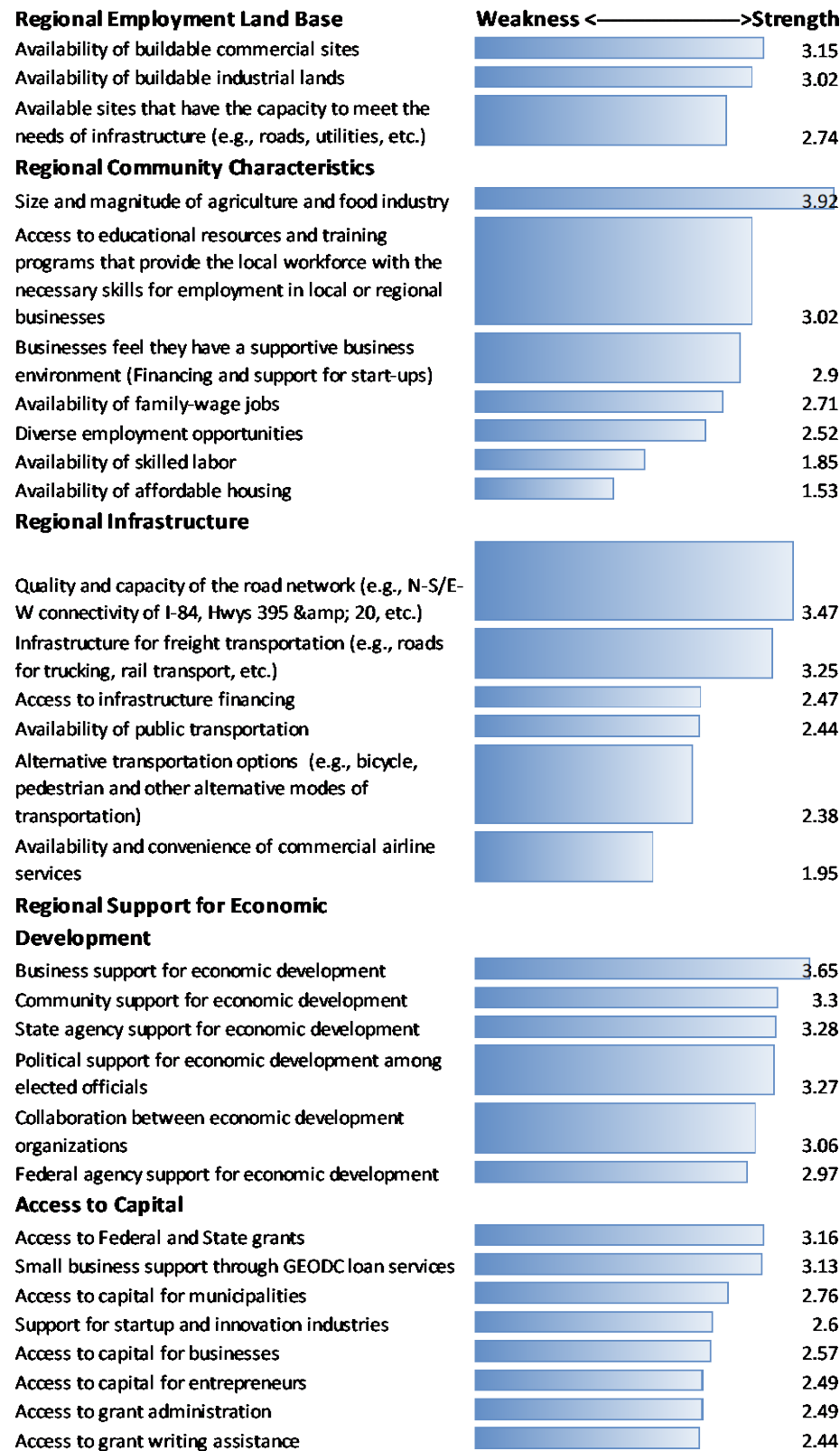
As a general observation, few of the statements were rated similarly by all respondents. Most statements had some individuals that perceived them as a strength or opportunity and others that perceived them as a weakness or a threat. Our assessment is that these results are consistent with the geographic extent and diversity within the GEODC region. That said, it creates challenges in developing a SWOT analysis that reflects the conditions of all communities in the region.

Strengths and Weaknesses

Table S-1 shows the mean ratings for each of the statements based on the following scale: Major Weakness (1), Weakness (2), Neither a Weakness nor a Strength (3), Strength (4), Major Strength (5). Values above 3 indicate more respondents perceive the statement as a strength and values less than 3 indicate more respondents perceive the statement as a weakness. Tables with the frequency distributions for these questions are included in the Appendix.

- **Regional Employment Land Base:** Overall, this category was considered neither a strength or a weakness as categories averaged out to a score of 3. The Availability of Buildable Industrial Lands and Buildable Commercial Sites were viewed as slight strengths while Available Sites that have the Capacity to Meet the Needs of Infrastructure were viewed as a slight weakness.
- **Regional Community Characteristics:** Respondents scored attributes in this category as weaknesses more than strengths. The only clear strength in this category was Size and Magnitude of Agriculture and Food Industry. Access to Educational Resources and Training Programs for the Local Workforce and Businesses that feel they have a Supportive Business Environment scored neutral. Availability of Family-Wage Jobs, Availability of Affordable Housing, Availability of Skilled Labor, and Diverse Employment Opportunities were all clear weaknesses.
- **Regional Infrastructure:** In Regional Infrastructure, respondents also scored more attributes as weaknesses than strengths. Quality and Capacity of the Road Network and Infrastructure for freight transportation were considered strengths. Access to Infrastructure Financing, Availability of Public Transportation, Alternative Transportation Options, and Availability and Convenience of Commercial Airline Services were all considered weaknesses in this category.
- **Regional Support for Economic Development:** On average, respondents felt this category had more strengths. Business, Community, State Agency, and Political Support for Economic Development were all rated as strengths. Collaboration between Economic Development Organizations was rated neutral. Federal Agency Support for Economic Development was rated as a slight weakness.
- **Access to Capital:** Access to Capital had more weaknesses than strengths according to respondents. The two slight strengths were Access to Federal and State Grants, and Small Business Support through GEODC Loan Services. Access to Capital for Municipalities, Businesses, and Entrepreneurs were rated as weaknesses along with Support for Startup and Innovation Industries and Access to Grant Administration and Writing Assistance.

Figure S-1. Rating of Assets in Terms of Strength or Weakness

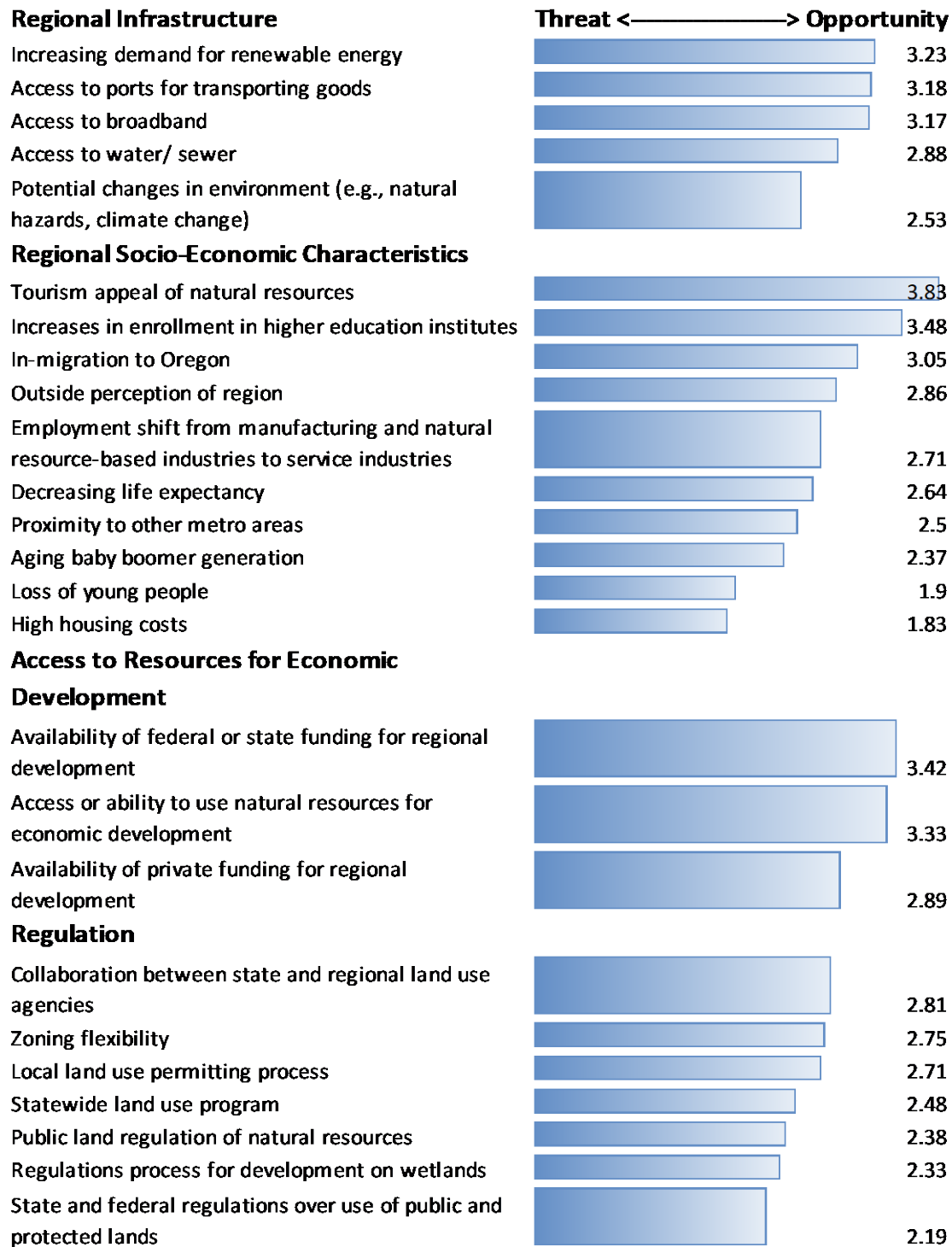


Opportunities and Threats

Table S-2 shows the mean ratings for each of the statements (based on the following scale *Major threat (1), threat (2), Neither a threat nor an opportunity (3), opportunity (4), Major opportunity (5)*). Values above 3 indicate more respondents perceive the statement as an opportunity, values less than 3 indicate more respondents perceive the statement as a threat. Tables with the frequency distributions for these questions are included in the Appendix.

- **Regional Infrastructure:** Regional Infrastructure had mostly opportunities. Increasing Demand for Renewable Energy, Access to Ports for Transporting Goods, and Access to Broadband were all viewed as opportunities to capitalize on. Access to Water/Sewer and Potential changes in the Environment were viewed as threats.
- **Regional Socio-Economic Characteristics:** The ratings in this category varied greatly. Respondents viewed Tourism Appeal of Natural Resources, Increases in enrollment in higher education institutes, and In-Migration to Oregon as opportunities. Outside Perception of Region, Employment Shift to Service Industries, and Decreasing Life Expectancy were slight threats. Proximity to other Metro Areas, the Aging Baby Boomer Generation, the Loss of Young People, and High Housing Costs were seen as clear threats.
- **Access to Resources for Economic Development:** Overall, this category was rated as having clear opportunities. Availability of Federal and State Funding for Regional Development and Access or Ability to Use Natural Resources for Economic Development were clear opportunities. The availability of Private Funding for Regional Development was a very slight threat.
- **Regulation:** Overall, the categories in Regulation were viewed as threats. Collaboration between State and Regional Land Use Agencies, Zoning Flexibility, and Local Land Use Permitting Process were slight threats. Statewide Land Use Program, Public Land Regulation of Natural Resources, Regulations process for Development on Wetlands, and State and Federal Regulations over the Use of Public and Protected Lands were seen as clear threats by respondents.

Figure S-2. Rating of Assets in Terms of Threat or Opportunity



Conclusion

Survey responses indicate that there was an improvement in the overall awareness of GEODC and the CEDS from the 2019 report. Slightly more than half of the survey respondents indicated that they were aware of the CEDS before receiving the survey, and of those who knew, a majority found it helpful. This indicates improvement in the dissemination of information and impact of the CEDS. However, there is still work to be done to increase the number of informed stakeholders. This encourages a continuation of the previous engagement strategy.

The general consensus among stakeholders is that a lack of workforce training and development, collaboration, affordable housing availability, and a mismatch of regional priorities are the largest barriers to economic development in the region. Issues of resilience are still central to stakeholders' concerns in the region. At the time of this survey, many stakeholders did not feel that the region is equipped to handle a natural or man-made disruption. Emphasis should be placed on strengthening infrastructure and supply chains, integrating with other local and state planning activities, and a continued focus on business continuity planning.

Overall, the majority of respondents are active in economic development and care greatly about it. The focus now should be on better connecting the various communities and ensuring that policy and improvements are done with the needs and wants of the respective communities in mind.

Appendix: Survey Data

The Appendix provides tables and charts for every question asked in the survey. It also includes a transcript of written comments provided by respondents.

Methods

IPRE based the survey off a similar survey we conducted in 2019. The purpose of the survey was to evaluate the perceptions and values of stakeholders in the region and to inform GEODC’s update of the Comprehensive Economic Development Strategy (CEDS). IPRE developed the survey questions based on concepts put forth by the EDA for Comprehensive Economic Development Strategies. IPRE also developed economic resilience questions based on EDA requirements and suggestions.

The planning team partnered with the GEODC for stakeholder identification and distribution. The survey used a convenience sampling methodology – survey links were distributed to a list of individuals provided by GEODC as well as through mailing lists. Respondents were also encouraged to forward the survey to interested stakeholders. The survey was distributed to members of both the public and private sector in the region.

IPRE administered the survey via the internet using the on-line survey vendor Qualtrics. Respondents could access the survey in the spring of 2023 and again in the fall of 2023. The survey included an introductory email with background project information as well as the goal of the CEDS Update Survey. All respondents had the opportunity to answer every question and all questions were optional. Respondents were given the opportunity to provide general comments at its conclusion. The survey received 128 responses (note that not all respondents answer every question).

Characteristics of Survey Respondents

Figure 1. Response Share by County

County	Percent of Respondents	Number of Respondents
Gilliam	4%	3
Grant	22%	18
Harney	12%	10
Malheur	9%	7
Morrow	11%	9
Umatilla	34%	28
Wheeler	9%	7
Total	100%	82

Source: 2024 GEODC CEDS Stakeholder Survey

Figure 2. Responses by Zip Code

Zip Code	Number of Responses	Percent of Responses
97204	3	3%
97301	2	2%
97720	8	8%
97738	2	2%
97750	1	1%
97801	21	21%
97810	2	2%
97812	1	1%
97813	1	1%
97814	2	2%
97818	3	3%
97820	2	2%
97823	2	2%
97826	1	1%
97830	4	4%
97836	3	3%
97838	5	5%
97844	3	3%
97845	10	10%
97850	2	2%
97856	1	1%
97862	1	1%
97864	2	2%
97865	2	2%
97873	1	1%
97874	1	1%
97875	1	1%
97882	1	1%
97910	1	1%
97913	2	2%
97914	4	4%
97918	3	3%
98174	2	2%
Total	100	100%

Source: 2024 GEODC CEDS Stakeholder Survey

Figure 3. Organizational/Agency Representation Among Respondents

Agency	Percent of Respondents	Number of Respondents
County government	14%	13
City government	27%	25
State or federal government	17%	16
Tribal government	3%	3
Nonprofit organization	20%	19
Special District	4%	4
Private sector business	6%	6
Other	8%	7
Total	100%	93

Source: 2024 GEODC CEDS Stakeholder Survey

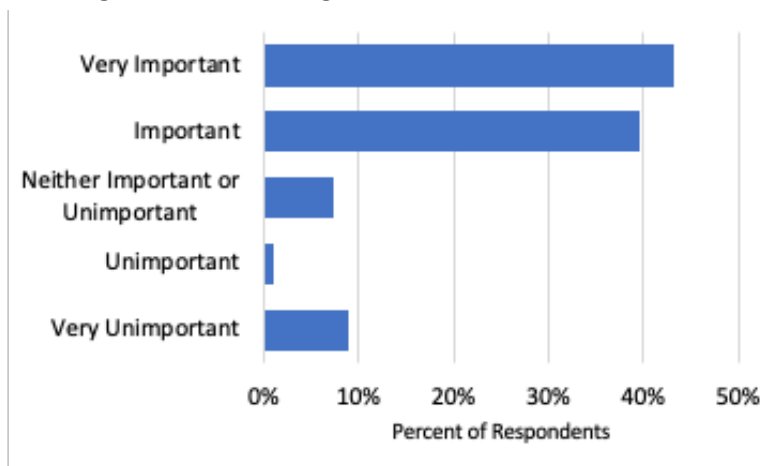
Figure 4. Level of Activity in Economic Development and Implementation

Level of Activity	Number of Responses	Percent of Responses
Not Active	9%	8
Slightly Active	24%	22
Somewhat Active	24%	22
Very Active	43%	40
Total	100%	92

Source: 2024 GEODC CEDS Stakeholder Survey

General Perceptions about Economic Development Planning

Figure 5. Respondent Importance Ranking of Economic Development Planning in the GEODC Region



Source: 2024 GEODC CEDS Stakeholder Survey

Figure 6. Stakeholder Awareness Prior to the 2019 Survey

Response	Number of Respondents	Percent of Respondents
Yes	67	55%
No	55	45%
Total	122	100%

Source: 2024 GEODC CEDS Stakeholder Survey

Figure 7. CEDS Use in Economic Development or Business Activities

Response	Number of Respondents	Percent of Respondents
Yes	31	47%
No	22	33%
Don't Know	13	20%
Total	66	100%

Source: 2024 GEODC CEDS Stakeholder Survey

Figure 8. Usefulness of CEDS for those who used it in Economic Development of Business Activities

Response	Number of Respondents	Percent of Respondents
Not at all useful	2	5%
Slightly useful	5	13%
Moderately useful	16	41%
Very useful	10	26%
Extremely useful	6	15%
Total	39	100%

Source: 2024 GEODC CEDS Stakeholder Survey

Regional Strengths and Weaknesses

Table 7. Strength/Weakness Ranking of Regional Employment Land Base

Statement	Major Weakness	Weakness	Neither a weakness nor a strength	Strength	Major Strength	Number of Responses
Availability of buildable commercial sites	5%	34%	22%	30%	9%	93
Availability of buildable industrial lands	9%	28%	18%	28%	16%	92
Available sites that have the capacity to meet the needs of infrastructure (e.g., roads, utilities, etc.)	16%	32%	24%	17%	11%	93

Source: 2024 GEODC CEDS Stakeholder Survey

Figure 9. Strength/Weakness Ranking of Community Characteristics

Statement	Major Weakness	Weakness	Neither a weakness nor a strength	Strength	Major Strength	Number of Responses
Availability of family-wage jobs	16%	31%	25%	22%	6%	102
Availability of jobs	4%	42%	17%	32%	4%	93
Businesses feel they have a supportive business environment (Financing and support for start-ups)	9%	28%	24%	30%	9%	98
Access to educational resources and training programs that provide the local workforce with the necessary skills for employment in local or regional businesses	60%	30%	9%	1%	1%	105
Availability of affordable housing	31%	55%	12%	2%	0%	100
Availability of skilled labor	14%	45%	20%	19%	3%	101
Diverse employment opportunities	1%	8%	22%	35%	34%	98

Source: 2024 GEODC CEDS Stakeholder Survey

Figure 10. Strength/Weakness Ranking of Regional Infrastructure

Statement	Major Weakness	Weakness	Neither a weakness nor a strength	Strength	Major Strength	Number of Responses
Quality and capacity of the road network (N-S/E-W connectivity of I-84, Hwys 395,19 & 20)	5%	19%	27%	42%	14%	93
Infrastructure for freight transportation (e.g. roads for trucking, rail transport, etc.)	10%	41%	18%	40%	13%	88
Availability of public transportation	18%	34%	23%	15%	3%	93
Alternative transportation options (e.g. bicycle, pedestrian and other alternative modes of transportation)	18%	44%	39%	9%	0%	92
Access to infrastructure financing	15%	38%	26%	10%	5%	73
Availability and convenience of commercial airline services	38%	0%	15%	7%	1%	94

Source: 2024 GEODC CEDS Stakeholder Survey

Figure 11. Strength/Weakness Ranking of regional Support for Economic Development

Statement	Major Weakness	Weakness	Neither a weakness nor a strength	Strength	Major Strength	Number of Responses
Political support for economic development among elected officials	9%	20%	20%	36%	15%	89
Community support for economic development	6%	19%	25%	40%	10%	89
Business support for economic development	3%	8%	21%	57%	11%	91
Federal agency support for economic development	7%	29%	27%	35%	2%	86
State agency support for economic development	8%	19%	20%	43%	10%	89
Collaboration between economic development organizations	6%	23%	34%	34%	4%	83

Source: 2024 GEODC CEDS Stakeholder Survey

Figure 12. Strength/Weakness rankings of Access to Capital

Statement	Major Weakness	Weakness	Neither a weakness nor a strength	Strength	Major Strength	Number of Responses
Access to capital for entrepreneurs	14%	42%	26%	18%	0%	72
Access to capital for businesses	11%	40%	31%	19%	0%	75
Access to capital for municipalities	7%	35%	34%	23%	1%	71
Support for startup and innovation industries	16%	35%	26%	21%	3%	77
Small business support through GEODC loan services	5%	19%	38%	38%	2%	64
Access to Federal and State grants	4%	22%	34%	37%	4%	83
Access to grant writing	26%	33%	14%	26%	1%	80
Access to grant administration	22%	33%	20%	25%	0%	79

Source: 2024 GEODC CEDS Stakeholder Survey

Regional Opportunities and Threats

Figure 13. Opportunity/Threat Ranking of Regional Infrastructure Metrics

Statement	Major Threat	Threat	Neither Opportunity nor threat	Opportunity	Major Opportunity	Number of Responses
Access to broadband	12%	22%	19%	30%	17%	90
Access to water/ sewer	8%	34%	23%	31%	3%	90
Potential changes in environment (e.g. natural hazards, climate change)	12%	33%	47%	7%	1%	85
Demand for renewable energy is increasing	10%	18%	26%	33%	13%	84
Access to ports for transporting goods	12%	20%	23%	27%	18%	83

Source: 2024 GEODC CEDS Stakeholder Survey

Figure 14. Opportunity/Threat Rankings for Regional Socio-Economic Characteristics

Statement	Major Threat	Threat	Neither opportunity nor threat	Opportunity	Major Opportunity	Number of Responses
Aging baby boomer generation	11%	49%	32%	7%	1%	91
Increasing life expectancy	2%	36%	57%	5%	0%	81
Loss of young people	31%	52%	14%	3%	0%	88
Proximity to other metro areas	21%	31%	27%	19%	2%	90
High housing costs	43%	38%	11%	8%	0%	90
In-migration to Oregon	10%	20%	32%	34%	5%	82
Tourism appeal of natural resources	2%	6%	22%	47%	23%	87
Employment shift from manufacturing and natural resource-based industries to service industries	14%	30%	31%	20%	5%	86
Increases in enrollment in higher education institutes	1%	8%	45%	35%	11%	80
Outside perception of region	8%	37%	22%	28%	6%	87

Source: 2024 GEODC CEDS Stakeholder Survey

Figure 15. Opportunity/Threat Ranking of Access to Resources for Economic Development in the GEODC Region

Statement	Major Threat	Threat	Neither opportunity nor threat	Opportunity	Major Opportunity	Number of Responses
Availability of federal or state funding for regional development	4%	20%	15%	53%	9%	80
Availability of private funding for regional development	7%	33%	27%	30%	3%	70
Access or ability to use natural resources for economic development	10%	15%	22%	38%	15%	81

Source: 2024 GEODC CEDS Stakeholder Survey

Figure 16. Opportunity/Threat Ranking for Regulations in the GEODC Region

Statement	Major Threat	Threat	Neither Opportunity nor threat	Opportunity	Major Opportunity	Number of Responses
State and federal regulations over use of public and protected lands	27%	38%	23%	11%	0%	81
Collaboration between state and regional land use agencies	14%	31%	20%	30%	5%	80
Local land use permitting process	13%	31%	33%	17%	6%	84
Public land regulation of natural resources	26%	31%	23%	19%	1%	81
Statewide land use program	20%	33%	28%	16%	3%	75
Regulations process for development on wetlands	18%	38%	38%	7%	0%	72
Zoning flexibility	19%	26%	26%	21%	9%	81

Source: 2024 GEODC CEDS Stakeholder Survey

Regional CEDS Goals

Figure 17. Level of Agreement with 2024-2029 CEDS Update Goals

Statement	Strongly Agree	Agree	Neither Agree nor Disagree	Somewhat Disagree	Disagree	Number of Responses
Provide Technical Assistance to Communities and Support Capacity Building Efforts	42%	47%	11%	0%	0%	95
Build on the Region's Entrepreneurial Culture and Assets	33%	47%	18%	1%	1%	95
Support the Needs of Rural Areas	68%	25%	5%	0%	1%	95
Advance Economic Development Activities That Provide a Range of Employment Opportunities	51%	42%	5%	1%	1%	95
Partner to Improve Workforce Training and Education	40%	41%	13%	1%	4%	94
Foster Collaboration on Projects of Regional Significance	41%	47%	10%	1%	1%	94
Support infrastructure assistance to communities	47%	44%	6%	2%	0%	95
Strengthen the region's resilience against climate-related impacts through resilience and/or mitigation projects	21%	34%	27%	3%	15%	95
Partner on efforts to increase availability of and access to broadband	43%	41%	12%	3%	1%	95

Source: 2024 GEODC CEDS Stakeholder Survey

Are there other goals not listed you think GEODC should consider?

- Our local and county governments are comprised of the baby boomer generation. These mindsets do not generally support change or understand the needs of a community and its future. It is
- I think the GEODC needs to strongly consider their community presence and engagement a top priority. They need to get out of the office and off of zoom and start engaging in the communities across the regions in which they serve, not just Pendleton. Strong economic development is happening in several places outside of the Pendleton area and they aren't even at the table for the discussions. Staff turnover seems to be an issue. Maybe relocating to a more active area would be beneficial for the office as a whole.
- Oregon seems to be a one sided state with everything mandated from Salem. Rural Oregon is much different than the metro area I wish they would understand this and work with us instead of telling us what we are to do and need it's like living under a dictatorship. we need more collaboration between us all. Thanks.

- Capacity to have the right people in place to provide some of the above mentioned services outside of GEODC staff.
- Not sure
- Focus on communities' historical importance and the geographical importance of how those communities were established & why. Blending this history along with promoting what is available to those visiting or choosing to reside in these communities today.
- Reduce or re-imagine environmental regulations in a manner that better serves our community, region and the Nation at large. We have a tremendous opportunity to leverage our natural resources, but the efforts of well-intentioned academics over the last several decades have devastated the most valuable resource we have at our fingertips.
- "Scarcity of water.
- Threat of the Open pit Lithium Mining
- Climate Change impact through wild fires and land erosion (Jonesboro Disaster)
- Mass migration due to lack of housing, store closings and a recession.
- Lack of economic development, no jobs, no housing, no in migration.
- "GEODC needs to remember that each of these communities are ""individuals"" and have their own personalities, needs, strengths and weaknesses. Communities need to be consulted ""across"" their population spectrum to help them develop their ""identity"". Who or What do they want to be like when ""they grow up""?
- Too often, external agencies or the ""government"" who is here to ""help"" has preconceived ideas and notions on what should take place in these communities. This doesn't work well. And for renewable power, this survey is probably referring to wind and solar. Has the concept of biomass and wood regeneration on a broad scale been considered??? This would work very well in many of the counties."
- Keeping the integrity of a small town while supporting its needs for the future. We need open ground and space. An example is we need affordable housing and dependable internet. Instead of breaking out new ground use ground that has structures and some infrastructure, but outdated and falling apart. Clear this ground and develop and improve it.
- "Development of large-scale and local businesses. Example: Eastern Oregon is hurting for shopping centers. Many from all over go to Tri-Cities Washington for retail and grocery. Adding a Costco and/or Winco would provide a closer option and keep spending in Oregon.
- Local opportunities for restaurants, bakeries, and activities would enhance the livability."
- "Creating more opportunity for economic development structure and staff in rural areas
- Creating ways to measure impact in rural areas and creating data"
- "Could consider a goal related to housing and support in recruiting people from out of state or in-state metro areas. While we may be able to offer a well-paid manufacturing job to one member of the household, there needs to be housing and a supportive internet infrastructure to enable the other member of the household to work in a hybrid or remote capacity.
- With net in-migration to Oregon dropping, it may be an opportunity to leverage some of the positive attributes of eastern Oregon to draw people to our region.
- Wood products industry retention - closure of pulp mills greatly threaten existing sawmills and hundreds of jobs, and will reduce ability to manage fuels and restore healthy forests. Need to help

industry find alternatives and align policies to support this (e.g. biomass power and co-gen opportunities).

- Workforce availability and housing availability are inextricably linked. The isolated the community (distance from a major population center), the harder it is to get new housing built. GEODC should have some focus on workforce housing as well.
- Not just partner, but build partner coalitions within region to help address economic development. Be the leader.
- Targeted strategies that facilitate flexible and equitable collaboration based on unique opportunities/challenges of different regions in the district. (Large region with substantial variety of needs and opportunities.)
- Staffing capacity support is really critical to cities and counties who are struggling to tackle big issues. Finding opportunities that have stable funding for longer durations of time in addition to supporting access through connections to funders and grant writing expertise.
- "The region of the GEODC is a region where value added agriculture, diversified agriculture and timber production (mountain lands) is a hedge against the ups and downs of service and corporate (tech) economic peaks and valleys. There must be balance and there must be vision to ensure that the rural urban landscape and the production lands work with one another to share infrastructure, re-use critical water resources and maximize opportunity. The strength of this region is in the middle class and in the small businesses that support both the ag and tech industry. They can be merged together and work as one if policies and plans underscore opportunity to do so (water re-use, UAV testing, ag technology hub, etc.). These areas of positive overlap set the GEODC region apart from many regions in the state and nation and should be invested in heavily to prove that urban and rural landscapes can coexist and support each other rather than compete with one-another for natural resources (e.g. water), infrastructure and growth.
- Lastly, this region is close to becoming one of the few regions in the United States where past sustainability problems with water and wastewater limit growth and prosperity for all social classes. Investments to finish the water sustainability agenda (including access to Columbia River water and aquifer recharge) are critical to the region's future. Without sustainable, affordable water there is no sustainable growth.
- It is critical that the GEODC position the organization to provide capacity to rural communities and tribes. Many of these communities are very small, understaffed with no bench strength and they lack the ability to write and administer the grants they need for their infrastructure projects. Even if they are capable grant writers, they do not have the time to write them and administer them and complete do their day jobs.
- None at this time.
- Focus on our Main Streets and rural communities that don't have basic infrastructure that supports growth and long term sustainability. Support for rural communities and organizations that are helping support small businesses.
- Development of natural resources in relations to travel & tourism in the region.
- Narrow the scope of services GEODC provides rather than trying to serve every economic development need in the region.

Q17: When you think about the regional economy, what keeps you up at night?

- Lack of housing, losing our young people
- We have many obstacles facing rural communities. Its very difficult to have open minded conversations about changes in economic growth.
- Lack of workforce. We have tremendous job opportunities across our region, most specifically in west Umatilla and Morrow Counties. We simply don't have enough people to fill the positions that we have. Affordable housing to bring people to the area for these positions is a very close second or tie.
- progressive politics of our state.
- Oregon's one-sided state idea's it is very scary.
- workforce, capacity within local communities to take advantage of state and federal funding opportunities.
- Lack of stable workforce
- Stores closing, high food prices, high gas prices, shifting to electric vehicles - with no significant private sector jobs being incentivized, higher cat tax, cap and trade scheme, etc. Everything is coming down to harm the modest to low income tax-paying citizen.
- Lack of family wage jobs in rural Oregon.
- I want to see growth and prosperity for all regions. I'm especially concerned for those areas off the I-84 route. I'm concerned about the balance of increased population vs what can be made available in regard to natural resources, infrastructure and services. I also don't want to see areas that are sometimes taken for granted or considered as not important or fragile taken advantage of. These off the beaten path areas shouldn't be this or any other state's dumping ground.
- The goals to move away from fossil fuels to 'green' energy will have negative impacts.
- Funding opportunities for not only government agencies but small business and start-ups. Major infrastructure project funding!
- "Lack of accessible resources. Their are identified service providers such as SBDC's that are identified as serving an area, but aren't in reality. Usually this is due to the large area they are supposed to cover. The communities that need the most support are usually fighting to even receive basic services.
- The bureaucracy of funding and how much paper work and time it takes for a community to receive funds. Small communities don't have the capacity for these huge lifts especially due to their high turn over rate in the first place.
- Census data defining low to moderate income communities. These are usually inaccurate and communities end up spending thousands of dollars more for a supplemental survey to show their LMI status, to be able to apply for LMI type funding. The census is not equitable for small communities.
- Overall, I think about small communities that are already facing barriers from within. Then with how regional, state or federal entities create their structures or programs, these small communities are faced with even more barriers to overcome to receive basic services. "
- The incoming recession
- Loss of business in the rural areas. Now that money from COVID solutions are going away businesses are closing. People have shifted to shopping online. Only business boom is UPS and Fed Ex.
- Environmental ideology.

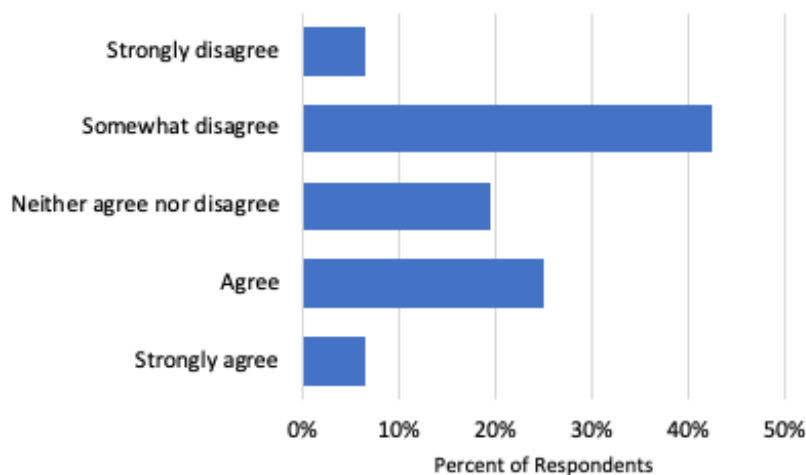
- Cost of childcare, impact of childcare costs on families who make too much money to qualify for federal and state subsidies but do not make enough to comfortably pay tuition. Lack of childcare/affordable childcare limits the workforce and innovation. It is detrimental to employers who need to have reliable employees.
- Workforce and workforce housing. Supply chain. Infrastructure.
- Infrastructure needs, weak labor pool, too much reliance on government
- The lack of workforce to fill open positions. The increase in drug activity in the area.
- Rural areas are in trouble due to climate change and the lack of water which will decimate the farming industry. No water management and no plan for water management and better farming practices for the future.
- Recruiting skilled workers or keeping the best and brightest in the community is top of mind. We want to hire and pay good wages for the area, but there is no one skilled available in the area and younger more technical people are leaving for larger cities. I imagine this happens in technical fields, medical, and engineering, as well as others.
- Infrastructure funding resources, better housing options
- Nothing! But, for our regional economy to succeed it needs to be community based and supported. And it needs to address local issues - such as the absence of property tax receipts that come from federal, tribal, and nonprofit landowners.
- Timely growth processes. We make it take too long and government gets in the way.
- "Regarding the regional economy, I believe there's a lot of opportunity.
- What keeps me up at night (not much :-), so: understood as concerns): the increasing polarity of perspectives in this region and the inability of government at all levels to ""adaptively manage"" most of the challenges we're facing at the social, economic and ecological level."
- The lack of affordable housing at all levels, but specifically in the median income bracket.
- workforce development - particularly for skilled trades and the mis-education around new typos of skilled trades (particularly green energy)
- "Current timber markets, in particular the collapse of biomass.
- Discussion on Removal of the Snake River Dam system
- Need for money for sewer, water, streets
- Nothing.
- lack of affordable housing, living wage jobs, childcare
- The lack there of...
- This is a really hard question to answer for the entire region. We are all vastly different, this shouldn't have been a "regional" survey. Our small rural towns are dying. We can't keep young people here when the older generations who are rich won't allow industry to come in because their family will lose some money and we have nothing for the young people to stay for! They leave and most don't come back. It's still a matter of the "good ole boys club" in Eastern Oregon. Boomers still control the purse strings at every level and they're also the ones who are draining our economy with the added living assistance they need and there is no one here to do those jobs.
- Nothing to draw our young people back into the area. Lack of professionals moving into the rural, frontier areas of Oregon.

- housing, childcare
- The cost of living and housing in our region is very high and unsustainable for many people.
- Limited younger people wanting to work; lack of drive or ambition.
- When the technology changes what happens to all the big concrete buildings?
- 1) Lack of housing and workforce; 2) Increasing state regulatory costs that would risk additional investments or operating margins that could put us into a position to shut down. "
- We seem to struggle to pull together and work to represent the East side of Oregon
- Pulp mill closures and lack of markets for wood chips created when process timber. Need policies that align with retention of sawmills and other wood processing plants which helps with hazardous fuels reduction (think about impacts of wildfires), improving health of forests (think of recreation and tourism), and maintaining healthy competition for raw materials.
- Workforce availability/housing
- Lack of housing that is restricting a quality labor pool needed to fill the many job openings in our manufacturing and warehousing companies. If we don't fill these needs, they will be forced to leave our region.
- lack of adequate funding from state and federal government. Local government in historically slow growing conditions have very limited tax base to address needs. Local government in faster growth conditions tend to have better tax bases to address local needs, but growth itself presents issues. I would like taxpayers to better understand and support the necessary tax base to address all services and infrastructure needed to serve their community and the region.
- A push to shift more towards hospitality and tourism by promoting use of the natural resources. Lack of planning to ensure this does result in a shift of local wealth, tourism fatigue, and obligate mutualism. Shifting economic vitality from one use of natural resource to another without building resilience and equitable opportunity with further friction and factionalism in rural communities.
- LACK OF EMPLOYMENT OPPORTUNITIES THAT COULD KEEP YOUNG PEOPLE IN THE AREA.
- Federal and state regulations that have no reality in Eastern Oregon on the ground truths
- Not enough younger people interested or wanting to live in the area.
- "We know we'll be losing knowledgeable and long standing people how have we prepared? And have we missed the mark?"
- Rural areas should consider creating destination locations within their own communities. "
- I worry about our greater eastern oregon communities' ability to respond to the next natural disaster. I have participated in a few FEMA natural hazard mitigation planning processes and I see that leadership is not looking at the bigger picture and appropriately identifying projects and resources that have a nexus in supporting deferred maintenance and modernization of buildings and infrastructure while also making us more resilient.
- Lack of rental/affordable housing. Outmigration of young people/families seeking better opportunities elsewhere.
- Fearful of the economic situation ahead
- The impacts of the legalization of marijuana, lack of affordable housing, "unhoused" persons, people going hungry, restrictive land use laws, inheritance tax structure in Oregon.
- Lack of affordable housing and rentals that would attract new businesses in the area.

- Water sustainability
- "Several things:
 1. Lack of capacity in smaller rural cities.
 2. Local politics
 3. Lack of Industrial lands that have the size and infrastructure.
 4. Access to workforce and access to housing. Can't have one without the other.
 5. Regulatory agencies who hold the keys to accessing natural resources that are needed to grow local industry.
 6. Many rural cities have not kept up with user rates for water and sewer - Current rates do not cover OM&R on their existing systems and when they look to finance an improvement project, rates are jumping anywhere from \$5 to \$30, and it is a difficult for the community to accept but required in order to access the financing.
- Lack of coordination among agencies.
- not enough jobs, not enough money to build affordable housing, too much regulation
- Lack of vision and leadership for major regional economic development opportunities.
- Infrastructure
- Are we doing enough? If we had more funding how would that impact our communities. There are towns that don't even have sewer systems and they need help to get the plans in place to do those big projects and the resources are so far away. How can we continue to connect the resources with our rural communities.
- Diversification & bringing back young people to living wage jobs.
- Water quality and quantity - the challenges to manage the aquifers and provide adequate supply of water for farms and for drinking.

Regional Resilience

Figure 18. Respondent perceptions of GEODC Region’s ability to quickly recover or withstand a shock



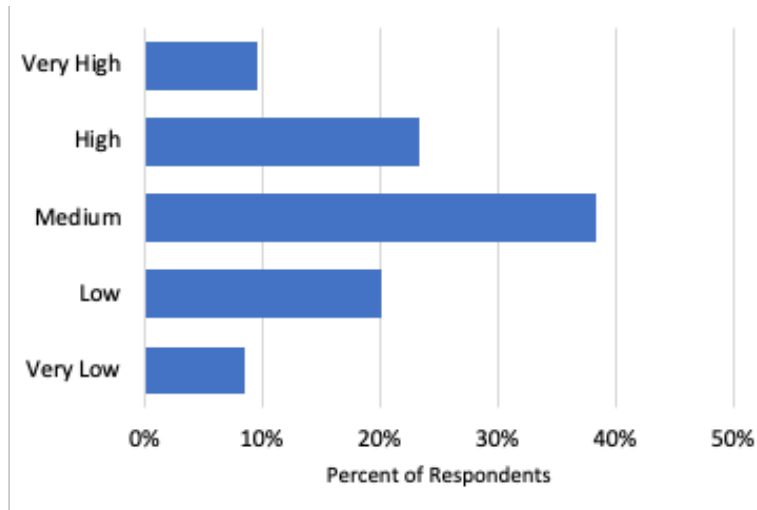
Source: 2024 GEODC CEDS Stakeholder Survey

Figure 19. Importance of addressing impacts of chronic or catastrophic events in the CEDS

Statement	Very Important	Important	Neither Important nor Unimportant	Unimportant	Very Unimportant	Total
The CEDS to consider business impacts resulting from chronic stresses (e.g. winter storms, wildfires, fuel price fluctuations, workforce availability, drought etc.)	37%	39%	18%	5%	1%	93
The CEDS to consider business impacts resulting from catastrophic events (e.g. major earthquake, wildfire, global recession/depression, continued drought conditions etc.)	35%	42%	17%	4%	1%	93

Source: 2024 GEODC CEDS Stakeholder Survey

Figure 20. Regional Sensitivity to Changing Weather Patterns



Source: 2024 GEODC CEDS Stakeholder Survey

Figure 21. Level of Agreement with Resilience Based Statements

Statement	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree	Total
The region has implemented strategies to ensure critical infrastructure systems used by businesses in the region will be available following a disaster (e.g. transportation, fuel, energy, water, etc.)	1%	23%	30%	38%	7%	73
Businesses in this region actively prepare business continuity plans to facilitate a quick return to business following a disaster	0%	17%	24%	48%	11%	66
Economic development plans are well integrated into other local, regional, and state planning activities (e.g. land use, emergency response, hazard mitigation, transportation)	3%	18%	31%	39%	8%	71
Organizational structures are in place to manage business sector response and recovery efforts in the region after a disaster event (e.g. a standing economic recovery task force)	5%	17%	23%	43%	12%	60
Local funding or grantmaking mechanisms for post-disaster small business financing and financial program management are available	2%	26%	21%	36%	15%	61
Economic leaders in the region actively identify local and regional partnerships that contribute to economic diversification	8%	38%	22%	26%	5%	76
Strategies are in place to maintain access to critical supply chains following disasters	5%	16%	26%	31%	21%	61

Source: 2024 GEODC CEDS Stakeholder Survey

Written Comments

Twenty-three respondents provided comments at the end of the survey. A transcript of the comments is presented below. The comments mirrored those provided elsewhere in the survey. Issues of workforce capacity and development, resiliency, and the size and diversity of the interests in the region were most common.

- Not familiar with the other county's economic status.
- Our local economic development coordinator is very helpful and active. Our county and city governments are not.
- Thank you!
- Economic assistance should focus on the key pieces of public infrastructure that must function in order to protect life and property, i.e. sewer, water, public safety. Everything else is value added. For instance, broadband. Really nice, but with satellite technology being what it is today, there appears to be a disproportionately large effort to improve an infrastructure that will largely provide indoor entertainment opportunities in a region that boasts some of the greatest outdoor opportunities in the world.
- In later editions, I would love to see childcare addressed. It is a crucial piece of economic development. When childcare is not available, employers and the workforce are negatively impacted.

- It would be nice to have regional CEDS work together with the Tribe to determine best practices for regional economic development. Tribes can be an engine of economic development in the area through job creation that maximizes their competitive advantages.
- Thank you! I look forward to the results and to create productive plans.
- "It's hard for me to see how this survey can be helpful or relevant regionally speaking: the socio-economic opportunities associated with counties like Morrow (with the Port of Morrow) and those counties through which I-84 runs are far more numerous and significant than those which lack I-84 which lack that infrastructure and the associated opportunities. Same, for the most part, regarding challenges.
- Focus on crafting your strategy and the messaging around it in a way that fits the region you're speaking to. Rather than talking about "climate resiliency," climate change, or environmental equity for example, message it around events or issues that people are seeing and living through every day - like focusing on the increasing prevalence and damage of wildfires, the persistent droughts, and the longer/hotter summers. In small frontier and rural communities that are separated from large metro areas, these issues impact everyone deeply. While they may be the same to you, your Eastern Oregon audience may recoil at the former and relate to the latter.
- Regional economic development, versus rural economic development, versus urban economic development are very different realms. It is important to engage the correct communities, land use officials and other city/county officials early on.
- We need staffing to support all the work in rural Oregon. This is a big task
- Some of the "regional" questions were difficult to answer because I feel that Umatilla County is very different than other regional counties in terms of population, geography, demographics, etc.
- "We look forward to participating and contributing if we can. We are a new start-up focused on new carbon products and revenue streams to address our changing forest and forest sector.
- In my position, I travel throughout the region to work with businesses that harvest and utilize wood. I do not live within any of the counties, but have done this work for over 25 yrs.
- Your work is cut out for you!
- Lack of formal structures or planning documents is not an accurate measure of resilience and recovery capabilities. In rural communities the knowledge capital is a more realistic and usable resource. Lack of funding for local governments and cultural values affect the communication and leadership, which can be challenging, inaccessible, and inequitable but proposing strategies that do not consider the true viability has historically resulted in dismissal and blame rather than collaborative solutions for misunderstood communities.
- The economic planners in our area are generally older, established individuals. We lack input and enthusiasm from the younger generation. Many of our young people move to more diverse areas seeking employment and a more varied life style, as well as intellectual stimulation.
- I am personally located in Umatilla County but also serve Baker, Crook, Deschutes, Jefferson, Wallowa, Union, Hood River, Malheur, Sherman, Wasco, and Gilliam.
- "Consideration should be given to what is a regional response vs. a state/federal response related to both chronic and catastrophic disasters/events.
- Also, local and regional organizations have little influence and control over federal/state regulations impacting land use, zoning, and other factors that influence the availability and cost of commercial, industrial and residential land. State land use policy has a significant impact on the availability and cost of Greenfields necessary for affordable real estate development. "

- Our organization represents sustainability interests in Morrow, Umatilla and Gilliam County. I had to identify one county in the above list so I identified the county that encompasses my mailing address.
- Thank you GEODC for your support with our Main Street Initiative this year.
- Would like to better integrate land use planning and water planning with CEDS.