

Greater Portland
**COMPREHENSIVE ECONOMIC
DEVELOPMENT STRATEGY**



GREATER PORTLAND ECONOMIC DEVELOPMENT DISTRICT

The Greater Portland Economic Development District (GPEDD), staffed by Greater Portland Inc, is a not-for-profit organization working in Clackamas, Multnomah, and Washington counties in Oregon and Clark County in Washington. GPEDD is funded primarily through grants awarded by the U.S. Department of Commerce's Economic Development Administration (EDA).



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July 2021

A LETTER

from GPEDD's Executive Committee



The Greater Portland Economic Development District (GPEDD) updates the Comprehensive Economic Development Strategy (CEDS) for the region every five years, but this update was different. A cohesive economic strategy is more important now than ever. The CEDS planning process began in January 2020, under the joint leadership of GPEDD and Metro, the metropolitan planning organization (MPO) for the region. Early in the process, the nation faced shutdowns and significant economic and social impacts as a result of the COVID-19 pandemic. To best respond, the GPEDD board of directors paused work on the CEDS and focused energies on economic recovery. That body of work, the Greater Portland Economic Recovery Plan, helped inform and is embedded in the CEDS. The GPEDD board of directors is committed to fostering upward economic mobility

for individuals and prosperity for businesses in the bi-state region. We have engaged in this comprehensive strategic planning effort to focus the collective efforts of all economic development partners in the area to establish regional goals, objectives and to guide partner efforts. Over 250 regional partners representing more than 100 organizations, jurisdictions and businesses were engaged during this 18-month process to collaborate, create and refine the direction of this work. Together with our fellow board members, advisors and stakeholders, we are proud to present the Greater Portland CEDS.

The Greater Portland CEDS seeks to unify the region around three core pillars: strong economic growth, equity and resilience. These pillars informed the CEDS framework and subsequent recommendations.

The GPEDD board is grateful for the strategy committee, which comprised leaders from the public and private sectors, nonprofit organizations, educational institutions and community organizations, and for the dozens of advisors and focus group participants who contributed to this tremendous body of work.

This strategy charts a bold new vision for the Greater Portland region, one with an equitable, innovative, resilient and forward-thinking economy that fosters upward economic mobility for individuals and prosperity for businesses. The GPEDD board is committed to ensuring successful implementation of the recommendations from 2022 through 2027.

Effective implementation is dependent upon our collective momentum and coordinated efforts.

Join us!

Kimberly Branam, Chair
Prosper Portland

Jason Green, Vice Chair
CBRE

Mike Bomar, Secretary
Port of Vancouver USA

Maria Caballero Rubio, Treasurer
Centro Cultural

Monique Claiborne, Executive Director
GPI/GPEDD

Elissa Gertler, Planning & Development Director
Metro

INTRODUCTION

The Greater Portland Comprehensive Economic Development Strategy (CEDS) was developed under the guidelines of the U.S. Economic Development Administration (EDA) to engage community leaders, leverage the involvement of private-sector partners, and establish a blueprint for regional collaboration. The Greater Portland region is defined as Clackamas, Multnomah and Washington counties in Oregon and Clark County in Washington and represents the area of focus for the Greater Portland Economic Development District (GPEDD).

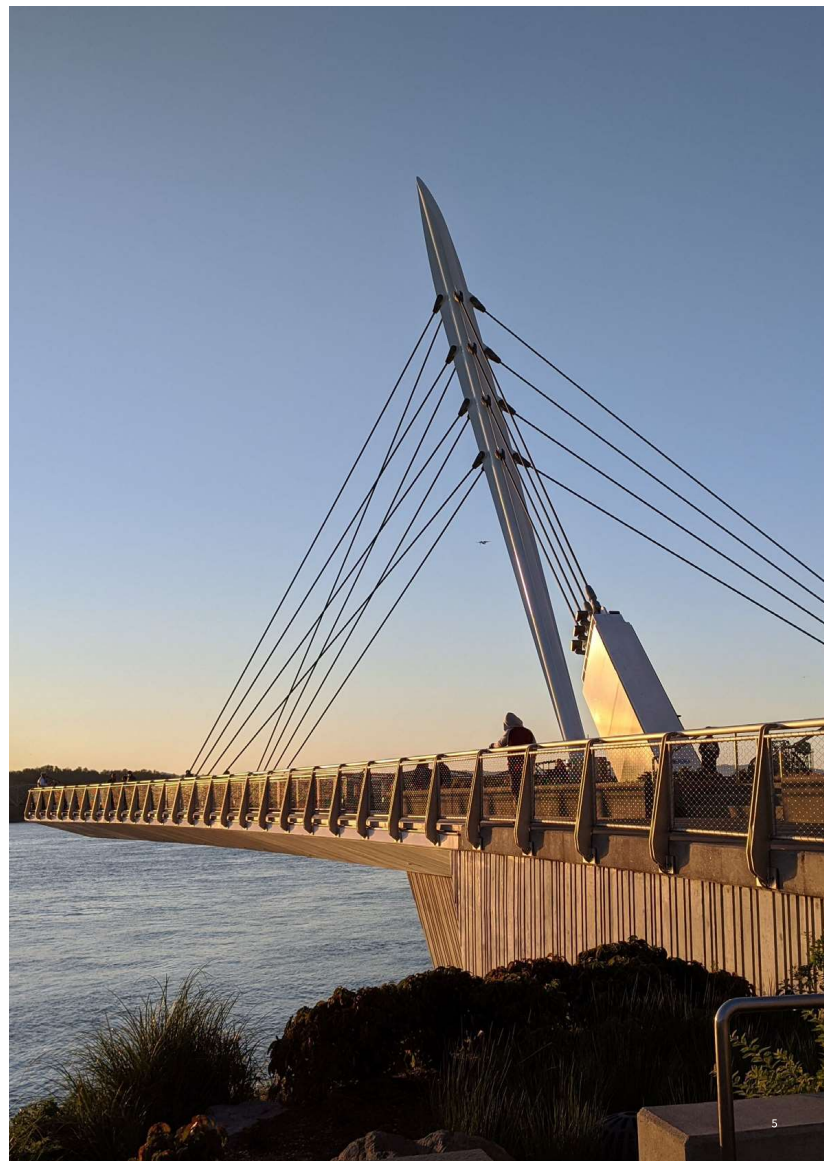
The CEDS planning process began in January 2020, under the joint leadership of Greater Portland Inc (GPI), the regional nonprofit economic development organization, its sister organization Greater Portland Economic Development District (GPEDD), the region's federally designated economic development district, and Metro, the federally mandated metropolitan planning organization (MPO) for the region.

Early in the planning process, as the nation faced shutdowns and was beginning to reckon

with the impacts of the COVID-19 pandemic, the GPEDD board decided to pause the CEDS work and focus on a more immediate short-term economic recovery plan. The economic recovery plan was approved by the GPEDD board in October 2020.

The analyses and recommendations in the economic recovery plan align with this long-term CEDS and the actions are integrated with the recommended actions for CEDS. GPI staff will manage the implementation of both the economic recovery plan and CEDS for accountability and transparent reporting of outcomes.

The strategy is based on data analyses coupled with numerous interviews and discussions with business leaders and organizations providing economic development services. The conditions assessment, a summary of the benchmarking and industry cluster assessment and stakeholder engagement, is the foundation for the CEDS strategy (Appendix D). A detailed summary of all participating stakeholders is provided in Appendix C.



HOW TO USE THE CEDS

This document is aimed at regional, city and county economic development practitioners, business leaders, elected officials and stakeholders implementing programs that support the growth of businesses and enhance opportunities for individuals to access economic mobility in the Greater Portland region. However, the goal of the CEDS is to advance equitable job and wealth creation

across the region. This requires alignment and implementation of actions across government agencies and organizations. It provides strategic direction to guide actions that will evolve over the next five years to meet dynamic economic and business conditions. The strategy is constant; the actions and organizations involved in implementation will change over time.



Educate

The Greater Portland CEDS is founded on the vision that the future Greater Portland economy will be forward-thinking and equitable. The vision needs broad support and this document should be used to engage elected officials and business leaders, to secure their help in amplifying the vision and providing support through their actions.



Invest

The strategy should also be used to leverage greater investment in the region by providing data and rationale that can be used to obtain grants to fund implementation; and align federal and states' legislative agendas to collaboratively solicit funding to support strategic projects.



Collaborate

Many organizations are actively working to create equitable economic growth across the region. It is important to collaborate to maximize collective efforts by:

- Coordinating with GPI to let them know about each organization's work so it can be leveraged across the region.
- Engaging other organizations or departments within a jurisdiction to break down silos and leverage resources to the greatest extent possible and elevate one another's work.

IMPLEMENTATION



To guide implementation, GPI and Metro staff will convene lead and partner organizations identified in the action matrix to advance the strategy. To ensure equitable implementation, the GPEDD board will invite leaders from small businesses, organized labor, BIPOC and other underserved communities, including organizations that utilize a gender lens, to convene to track, evaluate and

recommend modifications as the work progresses to ensure the values stated below are deliberately reflected in all of our work. GPEDD will encourage and support implementing partners in securing dedicated, ongoing funding to develop and implement meaningful engagement and capacity building for organizations that represent underserved communities.

GPEDD will engage with community-based organizations to better understand barriers to economic opportunity and identify opportunities to publicly support economic development strategies that support upward economic mobility. The GPEDD board will provide direction and oversight in the CEDS implementation.

We acknowledge that as a region, our economic development strategies fell short in ensuring that all businesses and people in the region experienced a recovery from the Great Recession. GPEDD and its partners are committed to developing and implementing a plan that will make significant progress in closing the wealth gap that expanded after the Great Recession.





THE GREATER PORTLAND STORY

Greater Portland is home to companies that operate on a global scale such as Nike, Intel and Boeing. The region excels at creating, making and exporting innovation, ideas and products that generated an increased value of export growth of 22% between 2013 and 2018. International companies such as Adidas and Daimler have located their North American headquarters in Greater Portland, advancing the region's global position. Operating on a worldwide scale, companies such as HP and SEH must vie with foreign company locations in Japan and South Korea for talent and efficiencies. Developing a skilled workforce and building efficient infrastructure, both physical and digital, are critical elements to retain the regional competitive advantage on a global stage.



Companies in this region are purpose-driven. The philosophy of the region is to advance equitable economic opportunity and development in ways that promote shared prosperity and address racial disparities. Private companies and public agencies in the region jointly support addressing challenges that limit access to economic opportunity such as low wages, unaffordable housing costs, wealth inequality, traffic congestion, air pollution, zoning, permitting and others. The region wants to create jobs and grow enterprises that help to advance its goal of ensuring a more resilient and equitable economy.

The regional community and retail markets embrace new and local products. Such products are a vital ingredient to a fast-growing food and beverage industry that is a defining element of the regional brand. The industry values commitments with rural growers that develop personal relationships and encourage innovation. Mutual support and collaboration foster the success of numerous regional brands, such as Bob's Red Mill, Dave's Killer Bread and Aviation Gin.



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For the Portland region to compete globally for talent and investment, it must be diverse. The region is currently 81.2% white, non-Hispanic, but by 2060 more than 50% of school-aged children will identify as people of color. Its Black population grew 4.3% since 2013 to more than 72,000 residents and is better integrated than 11 of its 13 peer regions such as Seattle, Denver and San Francisco. The region is less segregated geographically relative to peer regions though it continues to face significant displacement of communities of color from more centralized, less affordable parts of the region. The Portland region has better income equality compared to 12 of its 13 peers, which sets a solid foundation for increased diversity.

The State of Oregon's strengthening of land use laws and the establishment of an urban growth boundary in the 1970s to protect farmland and natural areas defines the region's genuine and authentic commitment to environmental protection and ensuring the highest and best use for commercial development. The region's investment in light rail over freeways during that same time kept the region from sprawling like many of its peers. This same land use planning philosophy was adopted by the State of Washington in 1990 through the Growth Management Act. With pride in a thriving quality of place, Greater Portland is one of the most desirable regions for talent to move and stay. With a culture of regional collaboration and organizations that manage transit and the growth boundary, there is a strong foundation to maintain the value of intentional growth that will help the region respond to climate change and other impacts yet to be realized by the COVID-19 pandemic.



STRATEGY FOUNDATION

The CEDS articulates a commonly defined purpose, vision and strategy to move the region in a unified direction. Recognizing that the COVID-19 pandemic will impact the economy for years to come, this CEDS focuses on long-term strategies for equitable and resilient economic growth. We have defined three core pillars of the strategy as follows:



Strong Economic Growth

A regional economy with increasing gross domestic product (GDP) over time and at higher rates than peers. An economy that is globally connected, driven by emerging technologies, diversified and adaptable, and welcoming to highly skilled entrepreneurial labor and scalable firms.



Equity

An economic system that ensures underrepresented and underserved people have the same level of access to the economy and wealth creation as all other residents.



Resilience

An enduring economic structure that fosters the capacity of individuals, communities, institutions, businesses and systems within a region to survive, adapt and grow, no matter what kinds of chronic stresses and acute shocks they experience.

This foundation is reflected in the following vision for the region in 20 years:

VISION

The Greater Portland region is an equitable, innovative, resilient and forward-thinking economy that fosters upward economic mobility for individuals and prosperity for businesses.

STRATEGY FRAMEWORK

The CEDS strategy committee developed a set of values and guiding principles that shaped goals, objectives and actions that were refined and approved by the GPEDD board. This framework will guide regional efforts for the next 5-10 years. This framework clearly articulates the desired outcomes of the strategy and its development.

VALUES

The values guide desired economic development outcomes. The Greater Portland region values:



Equitable economic growth

that improves upward economic mobility, provides enhanced opportunities, and builds wealth for BIPOC, underrepresented and under-resourced individuals in the Portland region.



Comprehensive skills development

that is provided within the region from early childhood through higher-ed, including vocational and post-secondary, to improve upward mobility.



Innovation and creativity

for a competitive, dynamic and healthy entrepreneurial ecosystem that supports new and existing businesses.



A sustainable environment

that assertively addresses climate change, fosters new technologies and improves public well-being.



Resilient regional investments

to build new and enhance existing social and physical infrastructure to handle economic and natural disasters.



Creating a favorable environment for businesses to thrive

with a supportive public policy and culture that supports physical and social infrastructure such as education, housing and childcare, and creates, attracts and retains new businesses.



Expanding job opportunities in both traded and local sectors

for all Portland region residents to pursue career opportunities that build wealth.

GUIDING PRINCIPLES

Guiding principles shape the development of the CEDS. The following factors were considered throughout the strategy development process.

A cultural and racial equity lens will ground all objectives and actions to actively respond to the increasing income inequalities exacerbated by the pandemic.

The private sector will be actively engaged to effectively implement objectives in collaboration with public and nonprofit sectors.

Clear and transparent roles and lead organizations are identified to efficiently implement the plan.

Collaborative bi-state leadership that recognizes and values different community assets (e.g., urban and rural) and will actively promote and invest in the CEDS and implementation efforts.



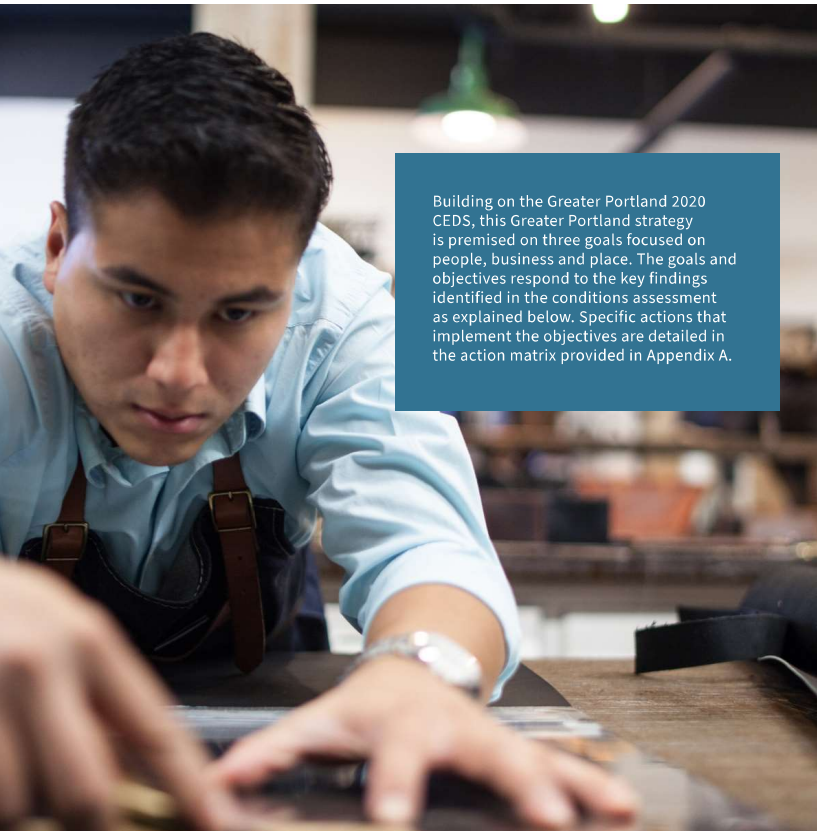


ROLES OF PUBLIC & PRIVATE SECTOR

Wealth creation and economic mobility is derived from access to incomes generated by jobs and equity through business creation, home ownership and investments. All of these opportunities to generate wealth are derived from the private market and reinforced by the public sector investing in infrastructure and land availability, maintaining community health and safety, providing sound governance, fostering an education and workforce system to build talent, and by addressing gaps in the private market regarding capital and technical assistance. The public sector has a key

role in working with the private sector to ensure businesses can sustainably grow and entrepreneurs can access capital and establish innovations that enable individuals with the opportunity to improve economic mobility. Successful communities provide these fundamental needs while sustaining a proactive culture of public-private collaboration to achieve public good and to cultivate innovation within market realities. Correspondingly, the private industries and sectors that benefit from public policies and investments will be encouraged to actively engage in economic development strategies.

	Public Sector	Private Sector
Role in Economic Development	<ul style="list-style-type: none"> Establish clear regulatory framework for markets Convene stakeholders to identify future visions or plans and find solutions to challenges Reduce barriers and encourage private development by leveraging investments in infrastructure, development-ready land, talent and skills development, public services, as well as technical and financial assistance to advance business activity and entrepreneurship 	<ul style="list-style-type: none"> Business creation and expansion Primary generator of employment Deployment of capital, expertise and technology to promote economic growth Inform and reinforce community investments that advance business expansion opportunities as well as labor and market access by providing expertise, guidance and capital support.
Example Organizations	<ul style="list-style-type: none"> State, regional, county and city governments, port districts, tribal governments and other public agencies. 	<ul style="list-style-type: none"> Micro and small businesses Emerging and established locally-serving businesses Emerging and established traded-sector businesses Scalable entrepreneurs

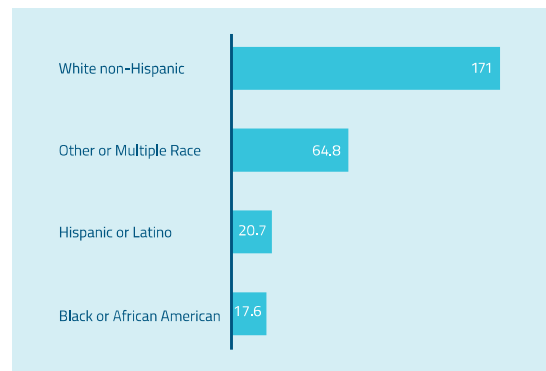


Building on the Greater Portland 2020 CEDS, this Greater Portland strategy is premised on three goals focused on people, business and place. The goals and objectives respond to the key findings identified in the conditions assessment as explained below. Specific actions that implement the objectives are detailed in the action matrix provided in Appendix A.

1 FOSTER UPWARD ECONOMIC MOBILITY

Since 2013, Greater Portland's median household income has increased 28% to approximately \$75,600. However, the net worth of the average white household is nearly ten times greater than that of the average Black household, and eight times greater than a Hispanic household.

Greater Portland Family Median Net Worth, Thousands of 2016 Dollars



Source: Federal Reserve Board, Survey of Consumer Finances

GREATER PORTLAND STRATEGY FOR EQUITABLE GROWTH: 2022-2027

Wealth creation matters for five reasons. First, wealth creation is a safety net that keeps households from being derailed by temporary setbacks and the loss of income. Second, it allows people to take career risks knowing that they have a buffer when success is not immediately achieved. Third, family wealth affords residents access to housing in neighborhoods with good schools, thereby enhancing the upward mobility

of their own children. Fourth, wealth creation matters to improve outcomes relative to the social determinants of health. In short, people with wealth enjoy longer and healthier lives. Finally, wealth creation affords people opportunities to be entrepreneurs and inventors; the income from wealth is taxed at much lower rates than income from work, which means that wealth begets more wealth.



OBJECTIVE 1.1

Provide comprehensive and coordinated skills development starting with child care through higher-ed, including vocational and post-secondary, and lifelong learning

Providing early learning child care is a critical community investment, helping to develop the necessary skills that allow a community to realize its human and economic potential. This is especially true for underrepresented children. Business leaders across all regional industries - metals and machinery, computer software, apparel and outdoor and others - want to start engaging students in middle school to prepare the local future workforce. This was evident in every industry focus group hosted during the CEDS engagement process. Higher education leaders in Greater Portland intend to build off this engagement and provide necessary skills development through college. Improving the skills of individuals not only improves the employment base, but also creates civic and business leaders that will guide the region in the future economy.

OBJECTIVE 1.2

Expand economic opportunities for all individuals with a focus on BIPOC and underrepresented communities

Expanding access to quality job opportunities increases economic opportunity and allows individuals to build wealth and begin to close the income gap. There are current opportunities within the health care and construction industries that should be leveraged. Industries such as software and design and media, which have minimal automation impacts and strong wages but are challenging to access, should be a focus for improved access especially for underrepresented individuals.



Greater Portland Industry Cluster Summary

	Share of employees of color (2019)	Share of talent w/ a BA degree or less (2019)	Share of jobs at risk for automation (index > 100) (2019)	Earnings per worker (2019)
Apparel & Outdoor	28.4%	74.8%	53.4%	\$93,113
Climate Tech	23.7%	47.8%	40.5%	\$100,700
Computer & Electronics	38.4%	51.6%	39.7%	\$160,840
Design & Media	16.6%	34.6%	8.5%	\$93,204
Food & Beverage	32.2%	97.5%	86.8%	\$61,614
Metals & Machinery	24.9%	79.2%	68.8%	\$87,275
Software	22.2%	18.7%	1.5%	\$137,883

Source: Bridge Economic Development

2 SUPPORT A COMPETITIVE ECONOMY

The job of economic development professionals is not to pick which idea or technology may succeed, but to create a fertile ground where innovation will thrive locally and become a pipeline to the region's next emerging sector. Greater Portland is well positioned to foster innovation in high-tech, R&D "advanced" industries that can address climate change and support the vital technology underpinning the future economy. Annually, the region, on average, attracts \$365 million in venture capital, according to analysis by the Center for American Entrepreneurship. The Brookings Institution estimates that nearly 5% of

Greater Portland employees work in innovation industries - a share that is on par with tech hubs Austin, Texas and San Diego, California.



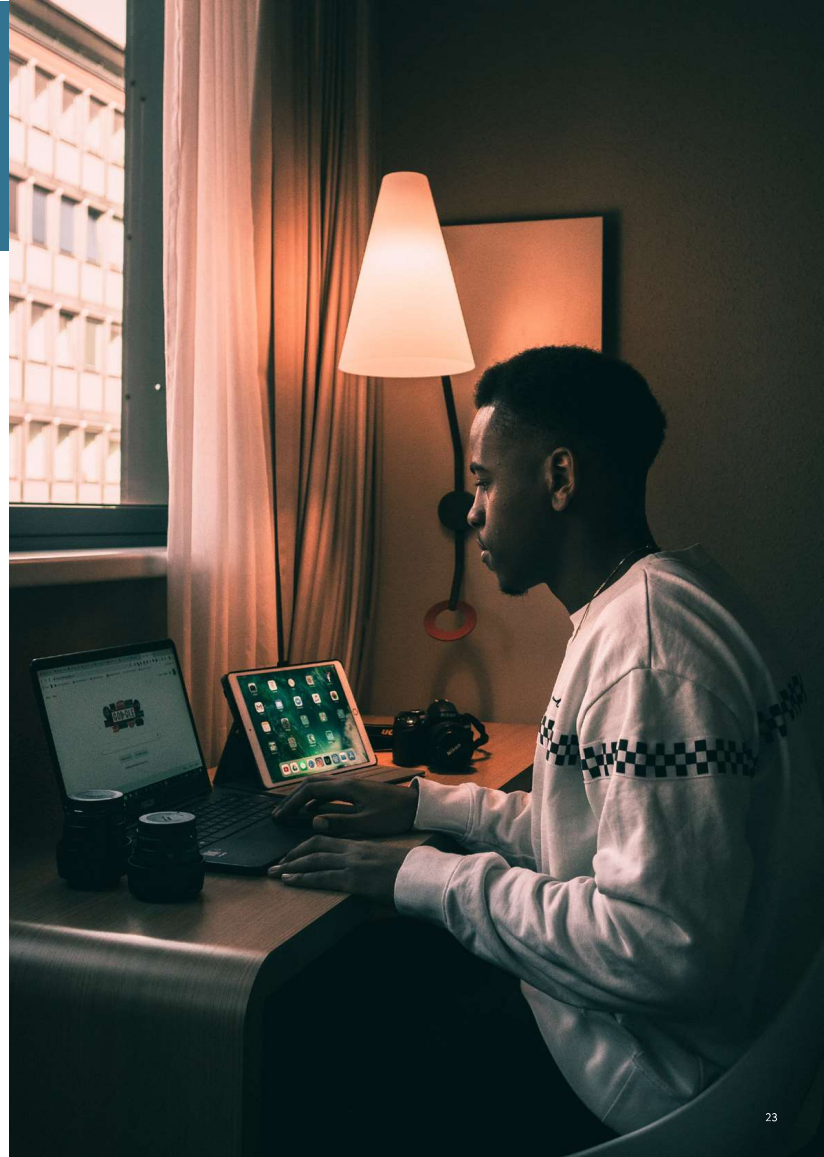
In developing tactical actions to support small business growth, it is important to recognize that small businesses are not uniform and those in different size categories face different challenges in accessing financing and technical support, and not all small businesses are positioned to scale. As identified by TEconomy Partners, LLC, while most entrepreneurs start by forming small businesses, not all small businesses are entrepreneurial. Small business owners develop companies to generate wealth and provide employment and income for themselves and others; entrepreneurs are

interested in creating innovative products or services that lead to further investment and growth. Understanding the different motivations and needed support services for these two types of businesses is important in developing the strategy and actions.

The unequal accrual of wealth via economic growth opportunities creates challenges for many existing small businesses as both the workforce and customer base they depend on become priced out of the community. Rising costs in an economy where economic opportunity is not rising at the same rate places limits on the types and varieties

of locally-owned businesses, especially those operated by BIPOC individuals. To encourage economic growth across business types and sectors, economic development actions should recognize and respond to both the direct needs of businesses as well as the broader economic conditions that are limiting potential for success.

In order to have a holistic approach to our region's economic development efforts, we must evaluate both the benefits and costs of economic development strategies to communities. Such a holistic approach is integral to the cultural and racial equity lens we use to guide our work.



OBJECTIVE 2.1

Develop an entrepreneurial ecosystem that supports robust local small businesses and scales traded-sector industry



New business growth in Oregon has been stagnant since 2017 but is growing in Washington. According to the Kauffman Foundation, a thought leader in growing and sustaining entrepreneurship across the U.S., less than 1% of Portland small businesses scale to “medium-sized” enterprises after 10 years. This ranks last among Portland’s peer communities.

The impacts of COVID-19 suggest new businesses will be emerging out of necessity. There is an opportunity to increase the support of scaling businesses tied to innovation with strategic investments. Additionally, focused contracting and buying from local firms, especially BIPOC-owned, through procurement policies among major anchor institutions such as health care and educational institutions and large traded-sector businesses should be utilized more broadly. Less than 1 in 5 startups in Portland are BIPOC-owned, ranking near the bottom of peer communities. This statistic alone is a call to action for the region to support increased investments in underrepresented enterprises.

Geography	Kaufman Index share of scaleups, 2017
Austin	2.30%
San Jose	2.20%
Nashville	2.10%
Pittsburgh	2.00%
San Francisco	1.90%
Phoenix	1.70%
Minneapolis	1.70%
Las Vegas	1.70%
San Diego	1.70%
Denver	1.50%
Seattle	1.50%
Atlanta	1.30%
Portland	1.10%

OBJECTIVE 2.2

Invest in innovations that strengthen and grow the Portland region traded-sector clusters

Oregon’s footwear and apparel cluster has been a key driver of the region’s innovation, per an analysis from Harvard’s Institute of Competitiveness and Strategy’s U.S. Cluster Mapping Project. To ensure a more resilient future, innovation within all regional sectors must be expected. Small fabricators will require automation equipment and an increasingly skilled workforce to remain competitive and stay in the region. Meanwhile, the computer and electronics (C&E)

industry supply chain is increasingly solidifying its presence in Asia. Global economic disruptions like these require a diversity of industry types, sizes and talent to foster a resilient regional economic base. Ongoing and enhanced commitment from Greater Portland’s business leadership to hire diverse talent will improve innovation and resiliency and strengthen the likelihood of improved financial performance for local enterprises.

OBJECTIVE 2.3

Enhance the Portland regional identity and brand for talent, capital and business

Several regional industries, specifically the apparel and outdoor and software sectors, indicated that retaining diverse, especially BIPOC, talent is their most important issue. However, according to the Partners in Diversity Retention Project, professionals of color convey there is an unwelcoming culture for diverse individuals in the Portland region. At the same time, between 2013 and 2019, venture capital funding in climate tech increased 3,750% and the Portland

region can genuinely leverage its brand and policies to access this opportunity for emerging businesses. By some estimates, 25% of the U.S. workforce may remain “remote workers” after the pandemic with the freedom to pick and choose their home locations. By addressing barriers and elevating authentic opportunities that enhance a more welcoming regional brand, Greater Portland can compete for that diverse talent pool, while attracting investment to help grow its industry base and BIPOC enterprises.



3 BUILD A RESILIENT REGION

“THE RIVER SYSTEM IS AN ESSENTIAL COMPONENT OF THE REGION’S MAJOR FREIGHT CORRIDORS AND INVESTMENTS”

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Resilience and economic growth are both vital for healthy economies in uncertain times. If a local economy is resilient, the recovery period will be much shorter than an economy with little or no resilience. If a local economy is not resilient, it may never return to its former economic growth path. Places that recovered from the 2008-2009 Great Recession included regions with high educational attainment, a diverse and adaptable workforce, attainable housing prices and rents, ongoing capital investment indicating the availability of significant public resources,

and those that are not dependent on the cyclical nature of a single industry. Likewise, resilient regions invest equally in addressing chronic stressors associated with economic inequality, which plagues all of our communities: poverty, limited education attainment, unemployment, health disparities, racial biases and other factors. As the current pandemic is showing, disasters disproportionately impact our most vulnerable populations. Regions will need to address those left behind and hit the hardest before they can jump forward.

OBJECTIVE 3.1

Construct resilient physical infrastructure

Measured by value, 74% of the commodities traveling in the Portland region are moved by truck and trucking will remain the predominant mode of freight transport in the region for the foreseeable future. Recent studies on the advancement of e-commerce indicate that the rise in demand for quick deliveries is adjusting how truck freight interacts with local distribution networks with fulfillment, warehouse and distribution centers located in exurban locations within or adjacent to the central city. Last-mile carriers have increased their workforces, expanded hours of operation and fleets, and employ not just trucks, but also vans, automobiles and bicycles to fulfill customer requirements for rapid local distribution. These recent shifts and the necessity of moving between modes to meet consumer demand elevate the importance of a well-connected multi-modal freight system that leverages these localized delivery methods alongside strong intermodal connections between the trucking system and air, rail and marine shipping methods.



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The river system is an essential component of the region's major freight corridors and investments that support marine-based operations and industry opportunities are supported in consultation with the ports and industries of the region.

In addition to freight delivery, high-growth industry clusters tend to be located in and rely on investments in multi-modal transportation infrastructure. This includes better traffic management and increased rates of carpooling to reduce unmet capacity when widening is not feasible, involves significant community impact, and transit availability is also a competitive advantage in attracting skilled workers.

Rebuilding the I-5 and Burnside bridges, which cross the two major rivers in the region, and understanding gaps in our fuel supply chain and emergency water provision plans, are vital for a resilient

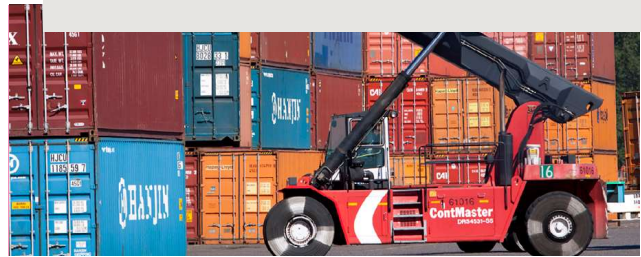
region that can withstand earthquake impacts and support the economic base. Investments in TriMet and G-TRAN support real estate development activity and help concentrate economic activity in addition to the traditional role providing mobility options for workers.

Additionally, targeted investment in other infrastructure such as broadband and climate technology innovation will contribute to our regional vitality. Broadband in underserved communities, both urban and rural, will increase resilience to economic shocks and disruptions (such as demand created by remote learning during the COVID-19 pandemic), help with recovery and support more robust growth. High-speed, quality and affordable broadband is critical for businesses and households. Furthermore, fostering new technologies that address impacts of climate change are of critical importance to the region.



OBJECTIVE 3.2

Strategically invest in public policies that align with economic development priorities

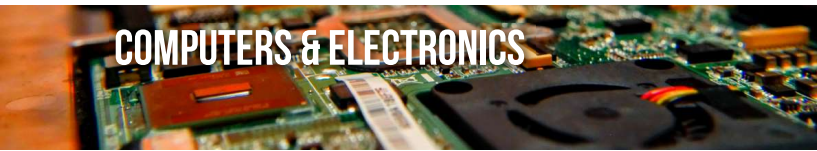


Businesses require available sites for expansion opportunities. The average site size needed is 17 acres, according to recruitment requests managed by GPI over the last five years. Public and private collaboration is required to provide appropriately sized sites that meet the location and infrastructure needs while implementing land use policies that address climate change. Focused alignment with Opportunity Zones, especially as the Biden administration looks to expand this program, can enhance outcomes of targeted site expansion. Additionally, continued investment in supportive infrastructure such as affordable housing and transit is vital for underserved individuals to access opportunity.

The COVID-19 pandemic has accelerated the adoption of remote work across the world. Researchers estimate that 25% of workers will remain working remotely after the pandemic (up from 2% before pandemic). An additional 20% of the workforce will do so part-time on a flexible basis. Greater Portland should support placemaking investments in diverse communities throughout the region to meet the needs of residents. Placemaking

fosters public gathering in open, accessible areas such as public parks or private retail and restaurants. Such environments may encourage remote workers to live and work in suburban or rural communities to reduce commuting and climate impacts.





GREATER PORTLAND INDUSTRY CLUSTERS

Conventional economic development strategies have focused on clusters that represent a competitive advantage (as measured by location quotients (LQ) – a measure for the level of job or industry presence industries have in an area). The unique three-pillar approach for this CEDS required new thinking – highlighting cluster strength along three dimensions instead of one. The table below includes key clusters in the region. For each criterion, they are ranked, with the lowest number being the strongest rank. There is a more detailed understanding of the barriers and opportunities facing each industry – some of which apply to several industries and some of which are specific to vital growth sectors in the region found in Appendix D – Conditions Assessment. For example, business leaders from computers and electronics, apparel and outdoor and software sectors identified the critical importance of improving the culture of the Portland region to make it more open and welcoming to diverse people.

	Economic growth score (rank summary)	Equity score (rank summary)	Resilience score (rank summary)	Overall score summary
Computers & Electronics	12	23	48	83
Software	25	34	53	112
Apparel & Outdoor	30	22	67	119
Metals & Machinery	28	31	61	120
Food & Beverage	30	22	73	125
Climate Tech	38	31	60	129
Design & Media	33	33	66	132

Source: Bridge Economic Development

Therefore, implementation should focus on improving diversity across all industries, not just one. Other examples of cross-sector investments include efforts to scale up small businesses, support entrepreneurs, enhance existing infrastructure and shared assets between industries, and foster new technological innovations.

Key takeaways about the region's seven target clusters are listed on the next pages. Additional analysis for each cluster is available in the conditions assessment (Appendix D):

KEY TAKEAWAYS



Computers & Electronics

- ▶ This sector is 15 times more competitive than the U.S. average; more than 90% of the region's workforce in this cluster is employed in sub-sectors that are at least 25% more competitive than the U.S. This gives Greater Portland a strong competitive advantage.
- ▶ C&E is responsible for 41,000 employees in the region and \$12 billion in economic output.
- ▶ While competitive, just 2 in 10 workers are women and less than 3% are Black. That said, 4 in 10 workers are BIPOC because of a strong Asian American presence in this cluster.
- ▶ 4 in 10 jobs are at risk for automation, per EMSI's automation index.
- ▶ From 2014 to 2019, employment in Greater Portland C&E cluster grew by 9.5%.



Software

- ▶ Greater Portland's software sector is 53% larger than the U.S. average, employing approximately 32,000, up nearly 30% since 2019.
- ▶ The sector accounts for \$8.8 billion in gross domestic product, ranking it second among the area's key clusters.
- ▶ 3 in 10 software employees are female, indicating a need for a regional effort to increase opportunity.
- ▶ Just 2 in 10 software employees are BIPOC.
- ▶ Of all the target sectors, software faces the lowest threat for automation in the future; just 1.5% of jobs are susceptible.



Apparel & Outdoor

- ▶ With the likes of Nike, Columbia and a very strong ecosystem, Greater Portland's strength in apparel and outdoor is 4 times the U.S. average.
- ▶ The sector employs 8,100 workers – up 18.5% since 2019.
- ▶ Eight in 10 workers are employed in sectors with a location quotient greater than 1.25, representing a very competitive sector for the region.
- ▶ 4 in 10 workers in apparel and outdoor are female - the greatest share of all target sectors.
- ▶ 3 in 10 workers are BIPOC, a share that is second to food and beverage processing.
- ▶ Half of the jobs represented by this sector are at risk for automation; however, 75% of the jobs in this cluster do not require a college degree. This represents a pathway to increasing upward mobility, even with the challenges posed by automation.



Metals & Machinery

- ▶ While a legacy sector for the region, the metals sector is 4 times greater than the U.S. average and employs 22,270.
- ▶ Since 2019, the sector has shown a decrease in employment of less than 1%.
- ▶ This sector accounts for \$3.3 billion in gross regional product.
- ▶ 18% of the sector's workforce is female; 25% are BIPOC.
- ▶ 7 in 10 jobs are at risk for automation, the highest of any target sector; 80% of those employed in Greater Portland's metal sector do not have a college degree.



Food & Beverage

- ▶ A burgeoning cluster for the region, food and beverage employs 18,500 workers – twice the U.S. average for a region of Greater Portland's size.
- ▶ Employment in the sector has increased by 25%, demonstrating a strong opportunity for expansion in the future.
- ▶ 33% of workers are BIPOC residents and 36% are female.
- ▶ While just 3% of all jobs in the sector require a college degree, 9 in 10 jobs are at risk for automation.



Climate Tech

- ▶ A sector representative of Greater Portland's sustainability brand, climate tech employs 14,200 in the region – a share 79% greater than the national average.
- ▶ Climate tech employment has increased 10.5% since 2019.
- ▶ Women represent 30% of the sector's workforce; BIPOC residents make up 23.7% of the employment.
- ▶ 4 in 10 jobs are at risk for automation; 50% of jobs in the sector require a Bachelor's degree or higher.



Design & Media

- ▶ This sector employs approximately 26,000 – 48% larger than the U.S. average
- ▶ It represents \$4.2 billion in economic output.
- ▶ 4 in 10 employees in design and media are female – a share that is second highest among the region's target sectors.
- ▶ 34% of jobs in design and media require a college degree; just 9% of jobs are at risk for automation.

>> continued from page 31

The CEDS does not identify specific industry clusters for targeted investment. However, it is recommended that GPI regularly convene focus groups with a significant private-sector presence for each sector to determine the opportunities and barriers that each industry is facing. Understanding this information will provide meaningful direction for future program development as well as critical detailed industry data to support recruitment efforts.

A consistent and important theme shared by industry leaders is the need for improving and expanding the regional talent pipeline. Currently, workforce organizations in the region are focused on jobs in health care and construction. These industries have lower barriers to entry and higher than minimum wages and are also projected to continue growing. They are important industries for local economies.

Industry Sector	Current Regional Workforce Training Programs
Computers & Electronics	
Software	✓
Apparel & Outdoor	
Metals & Machinery	✓
Food & Beverage	
Climate Tech	
Design & Media	
Health Care (local sector)	✓
Construction (local sector)	✓



An expanded focus in science, technology, engineering, art and math (STEAM) is encouraged for the development of the future workforce. While this is a longer-term and more challenging proposition, it is necessary to propel innovation in Greater Portland traded-sector industries, such as computers and electronics, climate tech, software, design and media.

It is also important to recognize that clusters are not just tied to the regional economy, but also to the regional identity. Industry clusters such as apparel and outdoor (Nike and Columbia), food and beverage (Bob's Red Mill and Smith Tea), and design and media (stop-motion filming and international architects) help define the Portland region's brand, ethos and authentic reputation.

Finally, because this strategy is forward-thinking as declared in the vision statement, the Greater Portland region will be responsive and supportive of emerging or aspirational clusters. Regional partners have the ability to evolve through the implementation of the CEDS to collaborate in support of emerging clusters such as bioscience, biotechnology and digital health in order to pursue business attraction, retention, expansion and entrepreneurial activities.

EVALUATION FRAMEWORK

Metrics serve three purposes:

- (1) measure progress towards outcomes,
- (2) determine if the actions are meeting the plan's defined objectives (impact), and
- (3) allow for transparent communication on progress and impact to the broader community.



Outcomes: Within the action matrix, each objective has an associated outcome to determine if the desired impact is achieved. The outcomes are measurable and, where applicable, define metrics for BIPOC individuals to assess if equitable outcomes are achieved.

Benchmarks: At a broader community level, key benchmarks will be tracked and reported annually to communicate both progress and impact. It will take several years to improve the statistics but consistent progress tracking will show that the region is maintaining a vital focus on the long-term goals. Annual reporting of the benchmarks will help maintain stakeholder engagement throughout the implementation process. Benchmarks should be compared with peer regions to provide a stronger context for the region. Metrics and peer regions are provided in Appendix B.





ACTION MATRIX

The action matrix (Appendix A) delineates actions to support CEDS priorities. Multiple stakeholders and organizations will contribute to the actions, as one organization alone cannot implement the strategy. Regional ownership is established by identifying lead organizations that champion and guide implementation. Potential partners are listed but are not

exhaustive. More organizations will be engaged as implementation advances. Without the structural organizational support, an action will simply remain a good idea. The matrix is a flexible tool that allows for the introduction of new actions over the years if they align with the strategy objectives and are represented by a lead organization.

REGIONAL OWNERSHIP IS ESTABLISHED BY IDENTIFYING LEAD ORGANIZATIONS THAT CHAMPION AND GUIDE IMPLEMENTATION.



APPENDIX A: ACTION MATRIX

GOAL 1: FOSTER UPWARD MOBILITY

OBJECTIVE 1.1 Provide comprehensive and coordinated skills development starting with child care through higher-ed, including vocational, post-secondary, and life-long learning



Action	1 yr	2 yr	3 yr	4-5 yr	6-10 yr	Priority Outcome	Recommended Metric	Lead Org	*Potential Partners	Resources
A. Support and scale the Shared Service Alliance (SSA) pilot program to share business administration for 50 child care programs. Automate child care management software, develop a backbone agency, and implement the business coaching framework.	✓	✓	✓	✓		Automate support for child care programs	A regional care organization exists and it has dedicated staff	Shared Service Alliance	Oregon Community Foundation, Social Venture Partners, CCR&R, Early Learning Division, United Way, Neighborhood House	Grant secured from the Oregon Community Foundation, Ford Family Foundation
B. Develop and scale a work group around student engagement to leverage state education agency and foundation dollars to address attendance and enrollment decline for PK-12 students of color.	✓	✓				BIPOC students (PK-12) are enrolled in school with intentional support for engagement	Number of BIPOC students enrolled in school with regular attendance	United Way	All Hands Raised, School Districts, ELD, ODE	Varied
C. Convene regional STEM organizations to inventory current programs offered to connect students with employers and identify gaps. Consider a bi-state regional marketplace for employers and K-12 schools to expose students to STEM and STEAM opportunities, particularly those from BIPOC communities to interact with professionals through coordinated collaboration. Also work with regional employers on company culture to ensure BIPOC employees are retained and advanced in careers.		✓	✓	✓		More K-12 BIPOC students are exposed to STEM and STEAM opportunities with regional employers	Number of BIPOC students engaged in STEM and STEAM programming	East Metro STEAM, Oregon STEAM Hubs, Career Connect SW WA	OBC STEM Committee, WorkReady Program, TIE Oregon, MESO, CTE, United Way, NW Natural, PGE, Economic Development Partners, City of Hillsboro	Leverage existing; State of Oregon
D. Advance the Quality Jobs Initiative to design and develop a regional approach to help employers introduce, change and leverage business practices to make living-wage, safe, and family-supporting jobs better and foster positive outcomes for their employees, specifically consulting with and supporting impacted front-line workers.		✓	✓	✓		Increase workforce program participant hires by businesses who meet Quality Jobs standards	Number of workforce program hires by businesses engaged in Quality Jobs initiative	Columbia Willamette Workforce Collaborative	AFL-CIO	New Program

E. Evaluate gaps and needs with partnerships between Greater Portland's K-12 and higher education leaders to identify and develop opportunities for intentional engagement. Research national models and best practices for K-12/higher education partnerships to emulate in our region.			✓	✓		Enhance early skills development to prepare for higher-education opportunities		New programs identified and implemented	GPI Higher Education Committee	K-12 districts, All Hands Raised, Education NW, Adelante Chicas, TRIO, United Way, City of Hillsboro	Leverage existing
F. Expand the capacity of Community Based Organizations and Non-profits through technical support and incubation. Early focus will address challenges resulting from the COVID-19 pandemic and subsequent recovery.	✓	✓	✓			Develop a regional incubator to support non-profit organizations through incubators and accelerators		Provide funding and technical support to multiple cohorts of strategically selected non-profits	Oregon Technology Business Center	Oregon Association of Non-Profits, foundations	New program
G. Advance Greater Portland Economic Recovery Plan recommendations for Target Impact Area 2 (Advance economic mobility for individuals) and Target Impact Area 3 (Support families and children)	✓	✓				See Economic Recovery Plan		See Economic Recovery Plan	GPI	Varied	Varied

OBJECTIVE 1.2 Expand economic opportunities for all individuals with a focus on the BIPOC and underrepresented communities

Action	1 yr	2 yr	3 yr	4-5 yr	6-10 yr	Priority Outcome	Recommended Metric	Lead Org	*Potential Partners	Resources
A. Secure resources to advance five-year goals of SINE (Survival Is Not Enough) to create a more diverse and inclusive region. Investments in SINE will provide opportunities to college graduates from communities of color and rural areas because the future of our communities' hinges on the leaders of our organizations reflecting the people who live here.	✓	✓	✓	✓		More BIPOC college graduates are exposed to job opportunities with regional employers	Track number of BIPOC participants in the program	SINE	GPI	Leverage Existing
B. Increase business support for Future Leaders Project (FLP) as a long-term strategy for ensuring business and community leaders are more representative of all the people that live in Southwest Washington. FLP provides college students from historically underserved communities a platform to build social capital and gain professional development through paid internships and mentoring from business, non-profit and public leaders.	✓	✓	✓	✓		More college BIPOC students are exposed to job opportunities with regional employers	Track number of BIPOC participants and participants from historically underrepresented communities in the program	Washington State University Vancouver, CREDC, Workforce SW WA	CREDC, Workforce SW WA	Leverage Existing
C. Expand Construction and Health Care industry workforce programs through additional funding and support.		✓	✓	✓		Increase job opportunities, particularly for BIPOC individuals, within these industries	Report number of jobs within the industries and percentage of BIPOC hires	Columbia Willamette Workforce Collaborative	PBDG, Metro, Port of Portland, NW Natural, PGE, AFL-CIO	Leverage Existing

D. Encourage development of a unifying umbrella to facilitate management of micro-enterprises with financial support via a statewide office for micro/small businesses. This management will help existing micro-enterprise organizations provide information, guidance and support for clients to expand, recruit and retain BIPOC talent. It is not envisioned that the management organization would provide direct services.		✓	✓	✓		Provide coordination of existing micro/small business organizations to enhance efficiencies and sustainable funding		A statewide staff person/program is identified to meet this need.	Community Chamber Coalition of Oregon	MESO, Oregon Entrepreneurs Network, PBDG, TIE, PCC SBDC, Mercy Corps NW, Business Oregon, WEDA, OEDA, Washington County Business Recovery Centers	New program
E. Increase available debt capital for small businesses who do not have access to conventional bank loans by securing new investors and donors for our region's CDFIs, including funds designated for loan loss reserves.	✓	✓	✓			Increased CDFI lending activity to small business owners throughout the region with an emphasis on women and people of color.		Amount of CDFI lending secured.	Point West Credit Union, MESO, Craft3	BBPDX, Community Chamber Coalition of Oregon, Xxcelerate	New program
F. As identified in the Greater Portland Economic Recovery Plan, develop a responsive regional technical assistance network to more broadly support micro-small businesses and entrepreneurs, after completing Action 2.1.A.	✓	✓				Enhance service provision to micro-small businesses and entrepreneurs		Survey number of businesses served and percentage of BIPOC companies	Community Chamber Coalition of Oregon, MESO, PBDG	Oregon Entrepreneurs Network, CREDC, TIE, PCC SBDC, Mercy Corps NW, Washington County Business Recovery Centers, Washington County	Varied

GOAL 2: SUPPORT A COMPETITIVE ECONOMY

OBJECTIVE 2.1 Develop an entrepreneurial ecosystem that supports robust local small businesses and scales traded sector industry

Action	1 yr	2 yr	3 yr	4-5 yr	6-10 yr	Priority Outcome	Recommended Metric	Lead Org	*Potential Partners	Resources
A. Conduct an evaluation of the existing regional system of small business and entrepreneur support services and assistance (ecosystem), including the support of innovation-based startups. This should include an evaluation of the region's entrepreneurial ecosystem and diagnosis of the factors that led to the region's low ranking by Kauffman Foundation relative to peer regions. Identify action items based on that diagnosis.		✓	✓			Elevate existing programs and identify gaps/needs for new programs	Stakeholder consensus on investing resources in a regional study	BBPDX, GPI	BBPDX, CREDC, SBDC, local incubators and accelerators, MESO, Venture Catalyst	Varied
B. Determine feasibility of and support for a Regional Innovation Hub designation to incentivize regional collaboration and creation of an innovation-based ecosystem.		✓	✓	✓		Innovation-based services delivered through a collaborative and cohesive regional innovation ecosystem	Increase in networking, connectivity, and collaborative/entrepreneurial culture in the region	Business Oregon	GPI, WA Dept of Commerce, SBDC, local incubators and accelerators, Venture Catalyst	Leverage Program; state funding to implement recommended action

C. Foster the further development of Oregon's risk capital stack per the Oregon Innovation Plan, January 2021 and consider opportunities such as the Angel Investment Tax Credit (Oregon only because credits reflect income tax), expanding CDFI support, and angel, pre-seed, and seed funds, sector-specific risk-capital, and working capital loan funds.		✓	✓	✓	✓	Private-sector market gap for investment dollars needed by innovation-based entrepreneurs is addressed		Additional risk capital created and available in the regional ecosystem	Business Oregon	GPI, WA Dept of Commerce, SBDC, Oregon Growth Board, MESO, local incubators and accelerators, Venture Catalyst	Leverage Existing; state investment in existing programs
D. Develop customized technical assistance to help companies transition to e-commerce and maintain a continued online presence.	✓	✓				Help small retailers diversify into expanded market opportunities		Number of BIPOC and underrepresented community members completed program	Prosper Portland	Community Chamber Coalition of Oregon, PBDG, MESO, SBDC, economic development partners	Prosper Portland proposed general funds
E. Conduct an innovation opportunities assessment outlined in the Oregon Innovation Plan, January 2021, to determine the innovation needs of Oregon's existing traded-sector firms, identify emerging market opportunities and help guide strategic investments in new Centers of Innovation Excellence.			✓	✓		Identify the greatest strategic innovation/technology opportunities in Oregon to help guide its strategic investments in the Centers of Innovation Excellence.		Representative cross-section of traded sector business leadership from across the region and number of potential Centers for Innovation Excellence candidates identified.	Business Oregon, GPI	Economic development partners, universities, business leadership	Leverage existing (Business Oregon is budgeting \$80,000 to complete the assessment)
F. Advance Greater Portland Economic Recovery Plan actions for Priority 1 (Help Small Businesses Recover and Grow)	✓	✓				See Economic Recovery Plan		See Economic Recovery Plan	GPI		Varied

OBJECTIVE 2.2 Invest in innovations that strengthen and grow the Portland region traded sector clusters

Action	1 yr	2 yr	3 yr	4-5 yr	6-10 yr	Priority Outcome	Recommended Metric	Lead Org	*Potential Partners	Resources
A. Support Centers of Innovation Excellence to facilitate the commercialization of research as a place to catalyze investments in new innovations.		✓	✓	✓		Foster the	Number of federal grants leveraged	Business Oregon	GPI Higher-Ed Partners, Venture Catalyst	Leverage Existing; state investment in existing programs
B. Develop regional industry cluster work groups to advance cluster-specific strategies and projects for innovation, business recruitment, retention, and expansion.	✓	✓	✓	✓		Hear directly from private business regarding barriers and opportunities to inform cluster-specific strategies	Number of new businesses or expansions within industry clusters	GPI	EDPs, CREDC, Higher Ed partners, Prosper Portland cluster leads, Business Oregon, WA Dept. of Commerce, Venture Catalyst	Leverage Existing; EDA Technical Assistance
C. Support programs such as Growing Small Businesses Globally and state and regional investment in CDFIs to ensure BIPOC and marginalized entrepreneurs are able to scale their businesses for traded sector opportunities, after completing Action 2.1.A.		✓	✓	✓		BIPOC entrepreneurs increase access to traded sector opportunities.	Number of marginalized entrepreneurs engaged in scaling programs.	GPI	SBDC, Global Trade Center, TiE, Venture Catalyst	Banking & Philanthropic partners

OBJECTIVE 2.3 Enhance the Portland regional identity and brand for talent, capital and business

Action	1 yr	2 yr	3 yr	4-5 yr	6-10 yr	Priority Outcome	Recommended Metric	Lead Org	*Potential Partners	Resources
A. Support/develop a steering committee of stakeholders and experts, including marketing specialists, to facilitate a regional branding process and implement recommendations. Focus on sustainability, innovation, global connections, bcorp/corporate shared values.	✓	✓				Develop a message that resonates with existing and potential new businesses regarding the Portland region's authentic assets	Improvement to existing Travel Portland and ULI survey results. Improvement to Site Selection Magazine's Top Metro's list and YOY state Business Tax Climate Index.	PBA, City of Portland	GPI, Travel Portland, Visit Vancouver, Port of Vancouver, CREDC, City of Vancouver, Business Oregon	New Program
B. Explore and promote regional strengths such as the region's inclusive culture to international markets. Leverage resources of SelectUSA and overseas representatives of Business Oregon and the State of Washington to position the Greater Portland region to international investors.	✓	✓	✓	✓		Develop a message that resonates with foreign businesses regarding the Portland region's authentic assets	Foreign Direct Investment estimates for Washington and Oregon from Select USA	Greater Portland Global, GPI	JASO, Business Oregon, WA Dept of Commerce	U.S. Department of Commerce
C. Secure support to ensure the NW Equity Summit is an annual event and can expand into an integrated regional program. Consider TRUE Northwest Arkansas as a model and visit with foundation and civic leaders to understand the program, level of investment and staff necessary to have a significant regional impact.		✓	✓			Enhance the Portland region culture of diversity to be more welcoming to BIPOC individuals particularly	Increase annual participation in NW Equity Summit	Partners in Diversity	PGE, GPI, NW Natural	Leverage Existing Program
D. Develop a business success & job creation table to provide stabilization to Portland businesses and workers.	✓	✓				Convey to existing business in the City of Portland that they are needed assets for the city to prosper and they are supported	Engage at least 100 businesses per year	City of Portland	GPI, City of Portland business leaders	New program



GOAL 3: BUILD A RESILIENT REGION

OBJECTIVE 3.1 Construct resilient physical infrastructure

Action	1 yr	2 yr	3 yr	4-5 yr	6-10 yr	Priority Outcome	Recommended Metric	Lead Org	*Potential Partners	Resources
A. Secure resources and facilitate construction of transportation projects listed in Appendix E. Engage private sector, economic and workforce development practitioners to confirm priority projects to include in the next Regional Transportation Plan (RTP) and advocate for existing projects that align with upcoming state and federal grant/funding opportunities.	✓	✓	✓	✓	✓	Construct resilient infrastructure	Number of resilient projects advanced and completed	Metro, RTC	Regional cities and counties, GPI, Port of Portland, Port of Vancouver USA, AFL-CIO	Leverage Existing
B. Support critical regional infrastructure projects, including Seismic Lifeline Route and Regional Emergency Transportation Route projects and other key projects such as the Interstate 5 Bridge Replacement Project, the Burnside Bridge Project, and Port of Portland's Resilient Runway Project.		✓	✓	✓		Construct resilient infrastructure	Number of resilient projects advanced and completed	Multnomah County, Clark County, RTC, Metro, Port of Portland, Port of Vancouver	Regional cities, AFL-CIO	Leverage Existing
C. Support a process that collaboratively engages property owners to consider how unreinforced masonry (URM) buildings can be improved for resilience.			✓	✓	✓	Increase supply of resilient buildings	Number of URM projects completed	State engineering and building associations	Regional cities and counties	U.S. Economic Development Admin.
D. Assess, develop and test emergency fuel management plans and emergency water provision plans for the bi-state region.	✓	✓	✓	✓		Determine measures to prioritize fuel and water, and to mitigate shortages in emergencies.	Completed emergency fuel needs assessment and fuel management plans and conducted action report. Completed emergency water needs assessments and plans for emergency water provision in place for all counties.	Regional Disaster Preparedness Organization	Oregon Department of Energy, Regional Water Providers Consortium	Homeland Security Urban Areas Security Initiative or U.S. Economic Development Admin.
E. Invest in R&D for climate technology innovation by finding, funding, and supporting startups working to reverse the climate crisis and solve other environmental challenges.		✓	✓	✓		Foster new technologies that will address impacts on climate change	Inventory VertueLab startups addressing climate change and climate technology innovation.	VertueLab	Regional cities and counties, Washington Procurement Technical Assistance Center, NW Natural, PGE	New Program
F. Explore the adoption of local policy across the region to use clean building materials in publicly funded infrastructure projects and leverage apprenticeships and workforce programs to ensure related skills development needs are advanced locally.			✓	✓		Encourage the use of clean manufactured building materials in publicly funded projects	Survey local jurisdictions to see if a policy is adopted.	Port of Vancouver USA, Port of Portland	Regional cities and counties, NW Natural, AFL-CIO	New Program

G. Incorporate regional work completed by partners in executing on broadband infrastructure investments as prioritized in Governor Brown's 10 Point Economic Recovery Plan and in the Washington State Department of Commerce's Statewide Broadband Office.		✓	✓	✓		Residents and businesses throughout the region have access to fast, reliable, and affordable broadband.		Deliver broadband to all communities in the region.	Business Oregon, Washington State Dept. of Commerce	Cities and Ports, Oregon Broadband Advisory Council	U.S. Economic Development Admin.
H. Support ability to compete in the river economy through multimodal connections to domestic and international markets via bi-state dredging sites.		✓	✓			Assess opportunities and gaps in river transportation network		Completed report	Port of Vancouver USA, Port of Portland	Lower Columbia River Channel Maintenance Plan, Friends of Frog Ferry, Columbia River Steamship Operators' Association, Pacific Northwest Waterways Association	U.S. Economic Development Admin.
I. Collaborate with community partners to ensure that public schools, hospitals, water systems, and other critical facilities have long duration backup power.			✓	✓	✓	Construct resilient infrastructure		Number of sites identified as suitable for clean backup generation.	PGE, NW Natural, GPI	Regional cities and counties	Federal infrastructure funds

OBJECTIVE 3.2 Strategically invest in public policies that align with economic development priorities

Action	1 yr	2 yr	3 yr	4-5 yr	6-10 yr	Priority Outcome	Recommended Metric	Lead Org	*Potential Partners	Resources
A. Retain and enhance incentives such as Opportunity Zones, R&D tax credits, Enterprise Zones (OR), Tax Increment Financing (TIF), State Small Business Credit Initiative (SSBCI), and SIP (Strategic Investment Program). Develop and advocate for new incentives to improve business competitiveness and support the workers they rely on.	✓	✓	✓	✓		Retain, enhance, and develop new incentives important to traded sector companies and small businesses	Legislative summaries from OEDA/WEDA	OEDA/ WEDA	Business Oregon, economic development partners, Venture Catalyst, AFL-CIO, BBPDX	Leverage Existing
B. Implement Oregon Brownfields Coalition priorities to incentivize brownfield cleanup and redevelopment with short-term focus to enable landowners to pursue insurance assets associated with dissolved companies in support of brownfield redevelopment opportunities (OR HB2377)		✓	✓			Increase number of buildable sites that are already served by infrastructure for business expansion and/or recruitment	Number of new sites available and number of sites advancing tiers in readiness	Port of Portland / Metro	OEDA, NW Natural, PGE, communities with brownfields	U.S. Economic Development Admin.
C. Implement recommendations in the Site Readiness Toolkit to move underused land into active economic uses – includes expanding use of existing development tools, legislative tool modifications, and prospective application of new real estate and finance tools.		✓	✓			Invest in recommended actions to increase number of buildable sites for business expansion and/or recruitment	Number of new sites available and number of sites advancing tiers in readiness	Port of Portland, Metro, GPI	Port of Vancouver, WEDA/ OEDA, NW Natural, PGE, economic development partners, NAIOP	Leverage Existing

Action	1 yr	2 yr	3 yr	4-5 yr	6-10 yr	Priority Outcome	Recommended Metric	Lead Org	*Potential Partners	Resources
D. Evaluate key economic and employment trends affecting the region, including employment land supply, demand, and constraints in Metro's Emerging Growth Trends work program which will serve to inform Metro's 2024 Urban Growth Management decision.	✓	✓	✓			Ensure growth management review cycle and land management policies reflect economic, employment, and industry needs and are structured to respond to market conditions. Maximize development capacity of existing lands and incorporate needed finance for construction and maintenance of supportive transportation and utility infrastructure.	Clear and updated understanding of employment land needs.	Metro, GPI	Regional cities and counties, Port of Portland, Port of Vancouver USA, GPI, NAJOP, Urban Land Institute, NW Natural, PGE	U.S. Economic Development Admin.
E. Ensure regional support for Business Oregon, Oregon Department of Agriculture, and Washington Department of Commerce to position exporters to secure new markets overseas		✓	✓	✓		Region continues to invest and actively engage in outreach with foreign markets	Summary of engagements and number of contacts.	Port of Vancouver USA, Port of Portland	Business Oregon, WA Dept of Commerce, US Commercial Service	U.S. Economic Development Admin.
F. Examine supply chain deficiencies and pursue nearshoring opportunities especially as it relates to the semiconductor industry that enhance the region's ability to recruit and retain traded sector companies including an assessment of land development capacity.	✓	✓	✓			Determine gaps in advanced manufacturing supply chain that need to be addressed.	Completed report	Port of Vancouver USA, Port of Portland	Business Oregon, WA Dept of Commerce, Washington County	U.S. Economic Development Admin.
G. Identify potential projects that support economic development that will provide affordable housing funded by the Metro bond measure	✓	✓	✓			Bring more affordable housing units into the region	Number of new affordable housing units	Metro, city housing departments	NW Natural, PGE, AFL-CIO	Leverage Existing
H. Identify potential projects that support economic development that will provide houseless services funded by the Metro bond measure	✓	✓	✓			Support houseless individuals and provide them with indoor shelter and housing	Decrease in unsheltered population as reported bi-annually by PSU	Metro, city housing departments		Leverage Existing
I. Support strategic remote work and placemaking investments region-wide to support job and housing growth and reduce climate impacts.	✓	✓	✓			Foster environment for remote workers to live and work in suburban or rural communities to reduce commuting and climate impacts.	Number of workers moving to and living in suburbs/Number of remote workers in suburbs	Metro, economic development partners		U.S. Economic Development Admin.

APPENDIX B: REGIONAL BENCHMARKS

The benchmarking data allows the region to evaluate progress in achieving the strategy goals on an annual basis. Recognizing that there is a significant amount of data that can be utilized, the region deliberately selected a limited number of data points that could be easily communicated to the general public as a metric for determining advancement.

To provide context regarding the region's progress, it is necessary to compare the data with different peer regions. To have comparable data across regions, the data must be publicly available on a regional level. Some additional benchmark data points were selected to determine improvement in specific strategy objectives, but are only available within the region. These are noted and will be provided by Metro as available. The comparable peer regions were determined by stakeholders considering the following factors:

- Population size
- Size of city in relation to MSA
- Population growth from 2000 – 2017
- Millennial population growth
- Frequent peer competing for site section prospects
- Aspirational region

OUR COMPETITOR REGIONS

- Boise
- Dever
- Minneapolis
- Nashville
- Phoenix
- Pittsburgh
- Salt Lake City
- San Diego
- Seattle



Data Point	Source
GOAL 1: FOSTER UPWARD ECONOMIC MOBILITY	
Median household income and earnings (by race/gender and by quintile)	Census
Educational attainment (by race/gender)	Census
SNAP eligibility for households	ACS
Poverty rate (peer region comparison and by race/gender)	Census
Home ownership by race	ACS
Equitable wealth distribution*	Metro (as available)
GOAL 2: SUPPORT A COMPETITIVE ECONOMY	
Change in total jobs (total and by industry)	BLS
New business establishments (total and by industry)	Census Business Patterns
GRP, per capita	BEA
Export value, growth, % GRP	International Trade Administration
Overnight person-trips + visitor spending*	Port of Portland, Travel Portland, Visit Vancouver
GOAL 3: BUILD A RESILIENT REGION	
Racial composition, foreign-born residents – total number of new people	Census
Median housing + rent value	ACS
Housing cost burden	ACS
Air quality	DEQ
Access to health insurance	Census
Access to health care*	Metro (as available)
Number of childcare workers, facilities and cost*	Metro (as available)

* May not be able to compare with peer regions, but show for regional progress



APPENDIX C: PUBLIC ENGAGEMENT APPROACH

Thorough and intentional stakeholder engagement was a top priority in developing the Greater Portland Comprehensive Economic Development Strategy. The **Greater Portland Economic Development District board of directors** advised and directed the planning process. This group is representative of the four-county bi-state region and is representative of principal economic interests including the private sector and public sector, community leadership, workforce development, institutions of higher education, labor and private individuals.

The **strategy committee** provided thorough review and direction of the content of the CEDS and countless hours of in-kind support of the work. All content was reviewed and vetted by the strategy committee before being presented to the board of directors.

Advisors engaged throughout the process, including providing feedback and insights in GPEDD board meetings. These individuals were instrumental in developing the Greater Portland Economic Recovery Plan and therefore provided additional support as the project team knit the two bodies of work together. Advisors provided additional expertise and lived experiences that are reflected in the CEDS and will be invited to continue engagement throughout implementation.

Advisors representing **Black, Indigenous and People of Color (BIPOC)** community-based organizations (CBOs) engaged in a human-centered stakeholder engagement

process through caucused, confidential deep listening sessions. These sessions deepened relationships and generated partnerships, created additional opportunities for BIPOC organizational leaders to discuss and shape key elements of the CEDS, and developed proposed actions specific to the long-term needs of BIPOC business owners and communities.

Industry cluster and economic disruption focus groups joined targeted meetings to provide feedback on their subject matter expertise. All participants reviewed materials in advance of the meeting, actively engaged in the focus group, and many provided support via follow-up communications. Their work is described in further detail in Appendix D.

Greater Portland Inc's board of directors and committees were also actively engaged in the process. The project team provided regular updates and collected feedback at all stages of the planning process. The groups include the Small City Consortium, GPI's higher education committee, Greater Portland Global, and Greater Portland economic development partners.

Metro Council and the **Metro Policy Advisory Committee (MPAC)** were engaged in the process in order to reach partner jurisdictions engaging in regional planning, as well as for transportation and land use.

In total, **over 250 individuals representing more than 100 organizations and jurisdictions** were thoughtfully engaged in developing the Greater Portland CEDS.

GREATER PORTLAND ECONOMIC DEVELOPMENT DISTRICT BOARD OF DIRECTORS

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APPENDIX D: CONDITIONS ASSESSMENT

To access Appendix D: Conditions Assessment, either use your smartphone camera to scan the QR code or click the link below.



Appendix D: Conditions Assessment

<https://www.oregonmetro.gov/sites/default/files/2021/10/12/Appendix-D-conditions-assessment-comprehensive-economic-development-strategy-updated-20211012.pdf>

APPENDIX E: TRANSPORTATION PROJECTS

The Greater Portland Comprehensive Economic Development Strategy contains a set of key transportation projects that collectively advance identified economic objectives for the region. This is not an exhaustive list and other strategic projects that support the region's economic aspirations may be identified and incorporated through Regional Transportation Plans among the two Metropolitan Planning Organizations serving the bi-state region, identified as part of the updated Regional Freight Strategy and Regional Emergency Transportation Route priorities, or advanced in association with other federal funding allocation processes, grant requests, or important local transportation measures. These projects represent a selection of key projects that support the region's economy by advancing the following critical transportation needs:

- Critical infrastructure and essential facilities – lifeline and emergency transportation routes
- Major freight corridors and throughways
- Industrial and employment area access
- Intermodal conflict improvements
- Jobs access improvements

The transportation projects were selected by engaging local partners as part of the CEDS development and referencing projects previously identified as priorities in related plans for the region:

- Regional Emergency Transportation Routes (RETRs)
- Regional Transportation Plans (RTPs) for Metro and Southwest Washington Regional Transportation Council (RTC)
- Regional Freight Strategy
- Transportation commission priorities that include private sector partners
- Local plans for industrial and employment areas

This set of projects and priorities will be used as a guide for making transportation investments that support the CEDS goals and objectives in alignment with transportation investment decisions by local, regional, and state partners.

CRITICAL INFRASTRUCTURE AND ESSENTIAL FACILITIES (REGIONAL DISASTER PREPAREDNESS ORGANIZATION & METRO PROJECT PRIORITIES)

- Statewide Seismic Lifeline Route projects
- Regional Emergency Transportation Routes (RETRs)
 - Connectivity improvements to emergency operation and dispatch centers, major public works, transit maintenance/storage facilities, fairgrounds, hospitals and disaster debris management sites.
 - Priority ETR redundancy in underserved areas within the urban growth boundary, Columbia County, rural Multnomah and Washington counties, and other areas with isolated populations at risk from earthquake and flood.
 - Mitigation projects in areas with higher liquefaction and landslide susceptibility.
 - Improvements to seismically vulnerable bridges, including county bridges that serve as detours to State Lifeline Routes.
 - Essential access improvements among areas with concentration of vulnerable populations and equity focus areas.
 - <https://rdpo.net/emergency-transportation-routes>

MAJOR FREIGHT CORRIDOR/THROUGHWAY (21)

BI-STATE + CLARK COUNTY (6)

- I-5 Columbia River Bridge (10893) + I-5/Victory Blvd to SR 500 (RTC 1009)
- I-5/SR-500 Interchange (RTC 108)
- I-205 Improvements (RTC105, 1012, 1013, Transportation Alliance Project B)
- WA SR-14 Improvements (Clark Co. Transportation Alliance Project D)
- WA SR-500 Improvements (Clark Co. Transportation Alliance Project A + C)
- WA SR-502/503 (Clark Co. Transportation Alliance Project K)

CLACKAMAS COUNTY (5)

- I-205, Abernathy Bridge (11969, 11585, 11586, 11891, 11904, 11981, 10001, 10144, 11242)
- I-5 Improvements (11304)
- OR 213 Improvements (10119, 10140)
- OR 224 Milwaukie Expressway (11350)
- OR 212 Sunrise Highway (12020, 11301, 10890)

MAJOR FREIGHT CORRIDOR/THROUGHWAY [21]

MULTNOMAH COUNTY (4)

- ▶ I-5 Rose Quarter/Lloyd District (11176, 10867)
- ▶ I-5 Freight Operational Improvements + Truck Climbing Lane (11991, 11984)
- ▶ I-405 Operational Improvements (11974)
- ▶ I-205 Northbound Auxiliary Lane (11370)

WASHINGTON COUNTY (6)

- ▶ I-5 Auxiliary lane extensions, interchanges + ramps (11302, 11402, 11583, 11989, 11990, RW-P2, RW-P3)
- ▶ OR 217 Capacity + Auxiliary lanes (11582, 12019, 11986, 11987, 11988, 11976)
- ▶ US 26 Operations, capacity, interchanges, crossings (11971, 11393, 11279, 10547)
- ▶ OR 99W Intersection Improvements (11666)
- ▶ OR 8 TV Highway Corridor Project (10557, 11390, 11137, 11392)
- ▶ OR 127 (Bridge upgrade on Cornelius Pass Rd. over creek – outside MPA)

INDUSTRIAL/EMPLOYMENT AREA ACCESS [42+]

BI-STATE + CLARK COUNTY (5)

- ▶ **Port of Vancouver** - SR-500 (RTC 1016) + SR-501 (RTC 1263), NW 32nd Ave
- ▶ **East Vancouver** - Mill Plain Blvd (RTC 154)
- ▶ **Ridgefield** - NW 219th St. arterial + ramp access for I-5 (Project G, H)
- ▶ **Whipple Creek** - NE 10th + NE15th Improvements (Clark Transportation Alliance)
- ▶ **Chelatchie Prairie Rail** (Clark Transportation Alliance)
- ▶ **Bi-state** - Priority projects defined as part of Columbia Connects project

CLACKAMAS COUNTY (11)

- ▶ **Clackamas** - Strawberry Land and 82nd Dr. Improvements (10023, 11514)
- ▶ **Johnson Creek** - Johnson Creek Boulevard (10002, 11763)
- ▶ **Milwaukie Business District** - Linwood/Harmony Intersection Improvements (10000)
- ▶ **N. McLoughlin Industrial Area** - Rail Crossing + Intersection Improvements (11623)
- ▶ **Oregon City** - Willamette Falls Locks (12090) + Meyers Road Extension (11544)
- ▶ **Rock Creek** - 172nd Ave + Rock Creek Blvd. Improvements (10041, 10033, 11135, 12071)
- ▶ **Basalt Creek** - Boones Ferry Road Extension (11765)

INDUSTRIAL/EMPLOYMENT AREA ACCESS [42+]

MULTNOMAH COUNTY (16)

▶ **Rivergate + Airport Industrial Area**

- ▶ Marine Dr. (10379, 10401, 11600, 10329, 10337)
- ▶ Columbia Blvd (10208, 10331, 10336, 10376, 12004, 11951, 11801)
- ▶ Airport Way improvements and grade separation (10358, 10362)
- ▶ Terminal 4, 5, 6 (11208, 11355, 11797, 10218, 10375)
- ▶ Terminal 5 (11659)
- ▶ Terminal 6 (11207, 11306, 11307, 11357, 11799)
- ▶ Rail Yard + Grade Improvements (11653, 11652, 11949)
- ▶ Columbia River + Columbia Slough Rail Bridges (11952, 11955, 11956)

▶ **Columbia Corridor East** - Troutdale Airport Master Plan Projects (11743)

- ▶ **East Multnomah** - 181st Intersection + Freight Mobility Improvements (10493, 10496, 10495, 10497, 10498, 10445, 10446, 10454, 11682)
- ▶ **NW Industrial** - Willbridge Rail Overcrossing (11117)
- ▶ **Swan Island** - Going/Greeley Interchange Improvements (11871)
- ▶ **Central Eastside** - Rail and Road Access + Circulation Improvements (11841, 11953, 10237)

WASHINGTON COUNTY (10)

- ▶ **Coffee Creek + Basalt Creek** - Basalt Creek Parkway (11470), Java Road Connection (11809), Day Road (11243), Grahams Ferry Road (10588, 11924), Boones Ferry Road (11487, 11764), Garden Acres Rd. (10853/UU-08), + SMART transit service + operations (11108)
- ▶ **Beaverton** - NW Cornell Rd. Improvements (10559)
- ▶ **Lake Oswego SW Employment Area** - Lakeview Blvd. (11935), SWEA Plan Infrastructure Actions (2A, 2B, 2C)
- ▶ **Tigard Hunziker** - OR 217 Overcrossing (10599, 10751), Ash and Hunziker Intersections (11220, 11223, 11407), + Wall St. (11995)
- ▶ **Tonquin Employment Area** - East-West Collector + Intersections (12046, 10568, 10674)
- ▶ **Tualatin Industrial Park** - Boones Ferry (10712, 10768, 11422), Tualatin-Sherwood Rd. (10568), Blake Street Extension (11417)
- ▶ **Wilsonville Industrial Employment Center** - SMART transit service (11328)
- ▶ **Hillsboro (New Urban Areas)** -
 - ▶ Meek Rd. Improvements (11387, 11910)
 - ▶ 30th Ave. Construction (11388)
 - ▶ Cornelius Pass Rd. Improvements + Extensions (10587, 11920, 11921)
 - ▶ Columbia River + Columbia Slough Rail Bridges (11952, 11955, 11956)

INTERMODAL CONFLICT IMPROVEMENTS (7+)

- Safety, multi-modal, and intelligent transportation system operation improvements on key commute and freight corridors (projects that reduce conflicts between modes – rail, truck, auto, transit, bike, walk, boat/barge and operations) transportation
- Bridge retrofit and rehabilitation
 - Broadway Bridge Rehabilitation (11902)
 - Earthquake Ready Burnside Bridge (11129, 11376, 12076)
 - Hayden Island Bridge (11874)
 - Kittridge Bridge Seismic Retrofit (10244)
 - Morrison Bridge Rehabilitation (10412, 11128)
 - N Portland Rd Columbia Slough Bridge Replacement (11802)
 - Ross Island Bridgehead (10235)
 - I-5 Boone Bridge Seismic Improvement

JOBS ACCESS IMPROVEMENTS (7+)

- Street improvements that address regional commute chokepoints
- Major regional transit projects
 - MAX Red Line Improvements (12083, 10922, 11045)
 - MAX Orange Line Extension (11937)
 - Mill Plain Boulevard Bus Rapid Transit (10921)
 - Portland-Vancouver High Capacity Transit (10902)
 - Steel Bridge Transit Bottleneck (10921)
 - SW Corridor (10907, 11587)
- Last-mile walk/bike/transit and enhanced transit (ETC) connections to employers with transit-dependent workers
- Walk and bike projects that address major gaps in commute network to and from major employers and job centers
- Trails and related facilities that support the recreation-based economy that are identified as proposed trails or address key gaps in the Regional Trails and Greenways System (<https://www.oregonmetro.gov/regional-trails-and-greenways-system>).

PROJECT TEAM

This project is funded in part by the U.S. Economic Development Administration's Partnership Planning Program which supports the development, implementation, revision, or replacement of Comprehensive Economic Development Strategies (CEDs).



Greater Portland Economic Development District

The Greater Portland Economic Development District (GPEDD), staffed by Greater Portland Inc. is a not-for-profit organization working in Clackamas, Multnomah, and Washington counties in Oregon and Clark County in Washington. GPEDD is funded primarily through grants awarded by the U.S. Department of Commerce's Economic Development Administration (EDA).

GPEDD is charged with developing and implementing the bi-state Comprehensive Economic Development Strategy (CEDs) which establishes and maintains a robust economic ecosystem by building regional capacity that contributes to individual, firm, and community success. GPEDD updates its CEDs every five years in order to continue qualifying for EDA assistance under its Partnership Planning Program.

GPEDD is managed by a Board of Directors representing principal economic interests in the region, including the private sector, public officials, community leaders, workforce development, higher education, minority and labor groups, and private individuals. This group oversees the development and five-year implementation of the CEDs. The GPEDD Board of Directors convenes quarterly.



Metro

Metro brings people together to shape the future of greater Portland and provides parks, venues and services across cities and counties. Led by an elected council, this unique government ensures Oregonians have a voice in parks and nature, land and transportation, garbage and recycling, and arts and event venues.



Agency Landscape + Planning

Agency is a mission-driven practice dedicated to addressing social equity, cultural vitality and environmental resilience through design excellence, strategic planning and community engagement. We believe that - in order to address the most challenging issues of our contemporary society - diversity and inclusion are foundational to how we see, understand and, ultimately, shape our collective experience, particularly in the public spaces, parks and streets of our urban communities.



Bridge Economic Development, LLC is a Woman-Owned Business Enterprise (WBE) economic development consulting firm that works with cities, counties and regional organizations to deliver actionable steps to grow an economy that serves the entire community. Setting them apart from other firms is ten years of combined experience working within a regional economic development organization and managing a municipal economic development department.

CAMILLE E. TRUMMER CONSULTING

Camille E. Trummer is a woman-owned boutique social change consulting firm working at the intersections of cultural strategy, community engagement, and facilitation. Camille helps her clients create organizational cultures and design projects that center social, economic, and environmental justice and are responsive to the pace and complexity of our world's greatest challenges and opportunities.



ECONorthwest provides independent, insightful, and relevant analyses that strengthen policy and investment decisions. Since 1974, ECONorthwest has served a diverse range of public and private sector clients across the United States: business management and labor unions; conservationists and energy companies; public planning departments and private developers; litigation plaintiffs and defendants.



The Feeding Cities Group is a social enterprise established to create equitable and resilient urban food systems. It also houses the Equitable Evaluation Practice, which specializes in measuring the impact of entrepreneurial support organizations in disadvantaged neighborhoods and on marginalized entrepreneurs. Kimberly Zeuli, PhD, the Founder and Managing Director, is an economist and consulting partner with Bridge Economic Development on broader issues of resilience and recovery.



Microenterprise Services of Oregon (MESO)'s mission is "to improve the economic opportunities of underserved individuals through empowerment, education and entrepreneurship for the benefit of the greater community." Each year, 600 entrepreneurs receive one to ten hours of staff time through consultations, trainings, referrals to business resources, participation in Individual Development Accounts (IDA), and access to financing.

ACKNOWLEDGMENTS from the authors

Greater Portland, Inc. (GPI) and Metro provided the leadership and funding for the Greater Portland Comprehensive Economic Development Strategy (CEDS) with the understanding that economic development is a team sport involving numerous stakeholders across the region. GPI and Metro staff were critical partners in the development of the CEDS, especially the thoughtful insights of Brittany Bagent and Jeffrey Raker. The ultimate feasibility and implementation of the CEDS rests on the good guidance received from the GPEDD Board, who provided feedback throughout the development of the strategy. Bridge Economic Development thanks our partners Tyler Bump and Matt Craigie at ECONorthwest, who provided important insights regarding future trends facing economic development. We acknowledge the important contributions of consultant Camille Elmore-Trummer who ensured all voices of the Board were heard during the process, and Nita Shah with MESO that provided important insights regarding the the under-served and under-represented business owners across the region. Finally, we wish to thank Brie Hensold with Agency regarding her insights and direction in developing the pilot projects that serve to immediately implement the CEDS.

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GREATER PORTLAND IS IN THIS TOGETHER

**Fostering Upward Economic Mobility
Supporting a Competitive Economy
Building a Resilient Region**

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