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Metropolitan Briefing Book, 2003

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Metropolitan Briefing Book

2003



Presented by
Institute of Portland Metropolitan Studies
College of Urban and Public Affairs

Greetings!

The Institute of Portland Metropolitan Studies (IMS) was created to better connect the resources of higher education to the issues and needs in the six-county, bi-state Portland-Vancouver metropolitan area (Clackamas, Clark, Columbia, Multnomah, Washington, and Yamhill counties). We have included the IMS mission statement and a roster of the IMS board members in this publication to give readers a clear sense of who we are and how we serve the region. You can find out about all of our initiatives, and download additional copies of this publication, from our web site: www.upa.pdx.edu/IMS/.

We've developed the Metropolitan Briefing Book to provide elected and appointed leaders, citizens and educators, with information about issues and trends common to all corners of our region. Our purpose is neither to create an agenda nor to reshape historic patterns of governance. Rather, IMS provides this information as a means of stimulating debate, discussion, and collaborative action. The Institute stands ready to assist with making connections and finding new partners, thereby putting the information we have provided here to work on behalf of individual communities and the broader metropolitan area.

This fourth edition of Metropolitan Briefing Book begins, as usual, with a report of the results from the IMS 2002 Critical Issues Survey. Following that is another regular feature, an updating of the region's demographic profile by Barry Edmonston and Eve Pepos of the Portland State University Center for Population Research and Census.

Heike Mayer reports in *Metropedia* on emerging industry clusters in the region's economy, and a team of researchers contributes a study on economic development strategy in the metropolitan area. Gary Perlstein, one of the nation's foremost experts on terrorism, provides an overview of the impact of terror on our region since September 11. Finally, Steve Johnson, a longtime observer of and activist in environmental policy, has crafted an in-depth report on the state of efforts to achieve sustainability in the region, complete with an inventory of sustainable businesses.

Please call IMS directly if something here catches your eye. We would be happy to share with you whatever additional data we have to help you put that information to work for your purposes. We sponsor a number of events yearly and put out a regular series of publications. We also want to hear from you about how we can make this publication better in the future. Finally, our thanks go to our contributors and to the Portland State University Publications Office for their customary outstanding work. Without their assistance, Briefing Book would not be possible.

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Critical Issues 2002

By *Craig Wollner, Senior Fellow, IMS*
 and *Debra Elliot and the staff of the*
Survey Research Laboratory, PSU

I. Introduction

Below are the findings of the latest Critical Issues List surveys. Every two years, the Institute of Portland Metropolitan Studies conducts a research initiative to define the most compelling concerns, problems, and dilemmas facing the citizens of the Portland metropolitan region. Gathered under the title The Critical Issues List, the results present to policy makers, activists, and citizens alike a compelling agenda for the foreseeable future.

The Survey Research Laboratory (SRL) at Portland State University (PSU) conducted the 2002 study under the direction of Dr. Debra Elliot under the auspices of the PSU Office of Graduate Studies and Research. The methodology employed to ferret out the most important issues for the region is a painstaking one that emphasizes the importance of the views of both leaders and citizens. Employing a slate of time-tested public policy issues on the future of the area, SRL interviewers conducted a random survey of the region's citizens by telephone. The telephone survey was completed in November 2002. It was designed to assess what residents in the six-county metropolitan region (consisting of Clackamas, Columbia,

Multnomah, Washington, and Yamhill counties in Oregon and Clark in Washington) feel are the important issues facing the communities and the region. The sample included 1480 completed responses from persons randomly selected from households in the metropolitan region.

In the second phase of the survey project, a mail-back survey instrument containing the questions put to those contacted by phone was sent to that portion of the IMS mailing list residing in the counties of the region. This list consists largely of elected and appointed officials, academic experts, and citizen activists. Of 3,390 surveys sent, 398 were returned completed for a response rate of 12 percent. Although this rate is low, SRL confirms that it is consistent with rates for other recent surveys using the mail-back methodology. Together, these surveys provide a glimpse of the vision of citizens and their leaders in the Portland area about its prospects—the perils, the challenges, the opportunities that confront all of us who care about the future of this remarkable place.

III. Any other critical issues facing the metropolitan region not listed

Although respondents to both surveys mentioned other issues, none was mentioned significantly in either or both instruments. Issues raised included the following: alcohol treatment, diversification of industry, strengthening the role of religion, parks and recreation, agricul-

II. The 2002 metropolitan Critical Issues List according to the general public, compared to 2000 (in priority order)

2002

1. Lifelong quality education
2. Strong economy and jobs
3. Access to affordable health care
4. Public safety concerns
5. Visionary, credible leadership
6. Protection and enhancement of environment
7. Diverse, integrated transportation
8. Containing growth / UGBs
9. Valuing diverse racial, ethnic backgrounds
10. Diverse, affordable housing

2000

1. Access to affordable health care
2. Lifelong quality education
3. Public safety concerns
4. Strong economy and jobs
5. Protection and enhancement of environment
6. Visionary, credible leadership
7. Diverse, integrated transportation
8. Containing growth / UGBs
9. Valuing diverse racial, ethnic backgrounds
10. Diverse, affordable housing

The 2002 and 2000 Critical Issues List according to opinion leaders (in priority order)**2002**

1. Strong economy and jobs
2. Lifelong quality education
3. Visionary, credible leadership
4. Diverse, integrated transportation system
5. Access to affordable health care
6. Protection and enhancement of environment
7. Containing growth within UGBs
8. Diverse, affordable housing
9. Public safety concerns
10. Valuing diverse racial, ethnic backgrounds

2000

1. Lifelong quality education
2. Strong economy and jobs
3. Diverse, integrated transportation system
4. Protection and enhancement of environment
5. Containing growth within UGBs
6. Visionary, credible leadership
7. Valuing diverse racial, ethnic backgrounds
8. Diverse, affordable housing (tie)
9. Public safety concerns (tie)
10. Access to affordable health care

tural subsidies, reliable and honest media, taking personal responsibility, making democracy work, arts funding, major league baseball.

IV. Quality of life

A separate question was asked on both surveys: “On a scale of 1 to 10, how would you rate overall quality of life with 1 being the worst and 10 being the best?” The average rating for each of the surveyed groups is below.

General public: 7.98

Opinion leaders: 7.05

V. A discussion of comparative results: The general public and the opinion leaders

As in 2000, 1998, and 1996, the 2002 Critical Issues List revealed a stolid, unyielding concern for the state of education in the Portland metropolitan region. It remained the ranking concern of one of the two groups—the general public and the region’s opinion leaders—surveyed in the biennial polling undertaken by the Institute of Portland Metropolitan Studies, and the second greatest concern of the other group. In 2002, however, the groups switched their positions from the previous iteration of the survey. In 2000, the general public displaced education as its number 1 concern and named access to affordable health care as its first priority, while the opinion leader group continued to view education as the region’s top issue, a ranking both groups had assigned it in 1998. In 2002, the

public reverted to education as its greatest priority, ranking the statement in the survey “ensuring adequate funding for a lifelong, quality education (pre-K-12, community college, college, graduate school) that is accessible to all, addresses different learning styles, and supports the regional workplace,” as their #1 concern, while the opinion leaders saw the economy (“developing and maintaining a strong economic infrastructure that provides stable, family-wage jobs, and a fair and equitable tax base to support public services”) as the most critical issue.

There is little mystery about why either of these issues should elicit such intense concern from the studied groups. Throughout 2001 and 2002, the state of the schools had been a high profile issue in the press and in the minds of citizens with a student in the family and even those without one. Moreover, Portland Public Schools, the state’s largest district, suffered through a futile search for a new superintendent following the resignation of a leader of rapidly dwindling credibility (the Beaverton School District also lost its superintendent in this period), an embarrassing internal fracas over the alleged anti-Semitism of a board member that stirred examination of the racial divide in the district as well as the competence of the entire board, and a well-publicized debate over the merits of teaching Huckleberry Finn which, again, batted on the issue of race. These difficulties framed the ensuing problems of education revealed by Oregon’s failing economy in 2002. The concomitant state budget shortfall was well publicized over the summer of a year in

which no less than five special sessions of the Legislature had to be held before any kind of agreement could be reached on how to balance the budget. A key obstacle on the road to agreement was school funding, a subject exhaustively covered in the press. The ultimate symbol of the fate of the schools became the announcement in the early Fall that in order to balance its budget, PPS would have to cut class days to the extent that the city's children would attend school in 2003 for fewer days than any others in the nation. This was, no doubt, a source of pleasure to some of them, but a severe embarrassment to their elders, an embarrassment exacerbated by constant reversion to the fact by national news media. Little wonder, then, that the state of the schools was on the minds of respondents in both segments when these instruments were administered.

As so often has occurred in thinking about the Critical Issues List, a significant number of those surveyed seemed to believe that an oblique approach to the biggest issues would be the best strategy. In that vein, many proposed dealing with significant issues by first paying primary attention to some other issue that was at the root of the more obvious or better publicized one, or at least thinking about the issues holistically.

The opinion leaders responding to the mail-back survey in 2002 apparently took this view of education, in that the chronic legislative wrangling over the budget allocation for education and the way in which tax support for it was generated played a large role in their thinking. "[Has] the dramatic shift of state tax burden from corporate-business sector been worth it?If not, shift load back to corporate/business sector so we can support education, health care, public infrastructure," one obviously frustrated individual wrote. "Funding of [the] education system without decreasing access to health care, environmental protection, etc., will require trade-offs..." another mused. In any case, the concern about schools ran deep in this group. "Quality education is our most significant need, one person wrote. "We cannot be a great city without adequate funding of our schools, K-12 especially." Others seemed to be in deep despair over the schools' plight. "Very concerned about schools," a respondent wrote simply. Another merely flatly stated an obvious truth. "The education system is in crisis," this respondent said.

If the heart of the travail of the schools was tax funding, attacking the region's economic problems was the highest priority for the opinion leaders; it had been a strong concern at #2 in 2000. "The number one priority needs to be the economy," stated one of the respondents. "If we had a great economy the rest of the issues [on the critical issues list] would take care of

themselves." Denoting the economy as the most important issue, the opinion leaders may have been responding to the fact that 2002 saw the state's unemployment rate rise to the highest in the nation and the regional high tech sector, a keystone of the regional economy, shed about 5,200 manufacturing jobs between April, 2001 and April 2002.¹ Many among them worried about a poor climate for business in the area. A representative comment from this perspective went, "let's get our act together and make Portland a great place to do business. It is not thought of in that regard today!"

More were concerned about what they what they plainly considered a defective system of taxation. A representative of the group bridged the gap between business development and taxation in writing, "[we] need to attract & retain business," an activity dependent in part on "adequate funding for local government." Others sounded the same theme. "Since state funding affects metro PDX funding, developing a tax base that covers needed service that is equitable and stable," was a typical remark in this vein. Although some saw economic recovery and stable funding of government as involving shifting the tax burden back more equally to business, a few took the opposite tack on the economy and taxation. One such prescription was "a stable funding system that does not punish just business." In that vein, one person wrote that the region requires "an economic development strategy that creates wealth here," and calling for "ownership of our capital." A more specific prescription demanded "access to international markets for trade." On the labor side, "fair access to good jobs for all residents," was recommended. Interestingly, this respondent had crossed out the word "citizens," making clear the writer's wish to cover immigrants as well as natives.

The public's #2 ranking for the economy in 2002 rose from #4 in 2000, suggesting general distress over its rapid decomensation in the 24 months since the previous survey and a correlation between the economy's health and the system of taxation. Surprisingly, the obvious answer to economic distress, "create more jobs for everyone," as one person succinctly demanded, did not manifest itself more frequently. But other ideas, like "do more to attract foreign and domestic business to the area," and the more self-evident, "economic growth is very important and should not be overlooked," cropped up often.

The third most critical issue for the general public was health care, stated in the survey as "access to affordable health care for all sectors of the community." It fell from the first position in 2000. Certainly the displacement of this issue can be attributed to the

¹ Christian Kaylor, Oregon Employment Department, May 2002 Release.

urgency of the twin problems of education and the economy, but also to the sense that health care costs had stabilized in the interim. However, in the context of early 2003, with its shrill headlines about rapidly rising health care costs, striking doctors linked to the specter of tort-driven increases in insurance premiums, and the erosion of the Oregon Health Plan (owing, again, to the state's budget woes) this assumption appears to have been premature.

Interestingly, the health care issue elicited a number of responses that focused on different aspects of the problem of health care. For one group of commentators from the public, the issue was strongly linked to the fate of the elderly. "Health care for senior citizens;" "Do more for senior citizens, including helping with the costs for medical care and the high cost of prescription drugs;" "health care costs and the costs of prescription drugs are too costly for most persons, including me and my husband. . ." "better health care and lower priced medications for senior citizens;" affordability of health care, including alternative medicine," were typical comments.

In another group, observations were focused on the Oregon Health Plan, with several people commenting that it needed to be overhauled, either to encourage more providers to participate or to institute a sliding scale of co-payment by users to help support it. Others were simply concerned about the needy: "I think everybody should be able to get health insurance whether or not they are working, said one person. "More health care for the needy [and] underemployed." A third, smaller, group of respondents was deeply concerned with the fate of the mentally ill in the region. "Mental health needs help," one person said flatly. A subset of this theme coalesced in a number of comments about the need for more and better drug and alcohol rehabilitation and education programming. "More funding for alcohol-drug treatment and mental health," a respondent said. One respondent mentioned health education in the community focusing on childhood obesity, education about healthy food choices, addressing the issue of junk food in the schools." Another respondent emphasized that providing health care and other services is key to their [the indigent] acting on their own lives."

Interesting also was the fact that health care rose from ninth in the 2000 survey to fifth in 2002 among the opinion leaders. Clearly, although the opinion leaders tend to be employed in establishments (government agencies, large corporations, schools and universities, nonprofit agencies) that generally offer adequate to excellent employee health care plans, the headlines that worried the public also arrested the attention of the "better situated" to some degree. This view is per-

haps an indication that, in many cases, recent changes to benefits packages have adversely affected health care coverage in even the richest plans, such that out-of-pocket expenses have begun to affect the group. On the other hand, a curious artifact of the rise in the standings for health care was that it was accompanied by minimum of commentary from the opinion leaders. One of the few emphatic observations about this issue, however, was one that called for "equal medical care to all races. Sensitivity of disease types that most impact certain races."

For the opinion leaders, the third most consequential issue was "visionary, credible leadership at all levels that engages citizens in public decision-making." This issue was no doubt framed for respondents by the Legislature's five special sessions in 2002 occasioned by the radically differing visions of resource allocation of the state's Democratic Governor and the Legislature's Republicans, which produced stalemate at every turn in the political season. The declining popularity in the waning days of his second term of Governor John Kitzhaber, once one of the most respected politicians in the state, perhaps indicated the public's frustration with politicians' ostensible inability to set partisanship aside and create mutually acceptable solutions to Oregon's problems. The Legislature had long since ceased to be admired by voters, a fact attested by the proliferation of initiatives transformed into ballot measures over the last several election cycles by citizens willing to bypass their elected lawmakers.

In the end, insofar as the fiscal and educational crises described above persisted, they may have been symbolic of the apparent dearth of leadership that affected the region and the state, as far as the opinion leaders were concerned. The sense that leadership was either defective or lacking entirely was conveyed by the comments of opinion leaders in the mail-back survey, which discussed a perceived problem at all levels of government. "In my opinion," a frank assessment went, "the critical issues revolve around the failure of our state and local leadership to approach the problems of growth in a businesslike manner." The key, a respondent wrote cynically, is "ensuring the viability of our neighborhood-based processes and increasing the responsiveness of our elected officials to other than developers and others with big bucks." Tired of politics as usual, one person recommended eliminating "divisive political arguments and work[ing] together for the good of the whole area." Another pleaded for "continued leadership on bi-state cooperation with Vancouver and Washington state." Another called simply for "stronger regional government coextensive with [the] metropolitan urban growth area." Commenting on the phrase in the leadership statement linking it with

“engag[ing] citizens in public decision-making,” a respondent who wanted to focus on developing individuals who could function vigorously in that role asserted that, “the coupling of ‘leadership’ with [citizen engagement] has the smell of an oxymoron. Citizen engagement has its place, but not as an element of effective leadership. Leadership implies the individual.” Another who saw it as a key wrote, “leadership, leadership, leadership—all else will follow!”

For the general public, the number 4 position was occupied by public safety (“police, fire, and public safety concerns”). There was no shortage of lurid crime in the region over the period between the surveys and even though the crime rate remained relatively stable, this was, if not a foremost concern, then something that was very much on their minds. As a result, the public commented on this issue extensively. Perhaps because of several headline-generating cases involving Portland police officers in questionable shooting incidents as well as the alleged use of excessive physical force, the accountability of law enforcement personnel was of particular concern to some of those who commented to researchers on the issue: one respondent observed that the keys were “accountability of local government, the Portland Police Department in particular;” “in reference to the police...being accountable to the public. Making sure law enforcement is protecting the public without violating constitutional privacy,” a second person said. “Keep the police from discriminating,” another said. One person took the issue beyond the front lines of crime, calling for “integrity at every level of the justice system, to include the accountability of the District Attorney for false prosecution and equal laws for pressing false charges.” This respondent ended with a shibboleth: “Fair and equal treatment for all!” Another person demanded, “more enforcement on illegal drugs.” Yet another perspective on public safety emphasized the need for greater attention to domestic violence, including “a place for children to go when domestic violence occurs.” A third line of thought worried about the safety and supervision of children. A respondent said, for example, that that government should be “putting money into programs to help keep kids off the street.” A number of people insisted that drug use prevention was of paramount concern.

True to form, the perception of the opinion leaders about public safety was more sanguine than that of the general public. The gap between the two was, as always, large. The opinion leaders ranked public safety #9 and failed to comment on it in their survey sheets.

To the opinion leaders, transportation (“supporting an expanded, diverse, affordable, and integrated regional transportation system that reduces congestion and moves people and goods safely and efficiently”) occupied the fourth position. The ranking represented a shortfall from 2000, when a like issue was #3.

Transportation has, in fact, oscillated somewhat erratically over the years, ranking #5 in 1998. This year, commentary on the issue was unusually limited, compared to previous years. One contribution was very specific. It called for “the expansion of the highway system to include a west side bypass to enable business development and freight movement.” Another was broad: “solving transportation issues,” it said was the key. “Light rail will not solve all our problems. Adequate funding for infrastructure repair and replacement. We have a tremendous investment in our water, sewer, roads and storm water sewer systems, and they are getting old and failing.”

To the public, the fifth leading issue was leadership. When researchers probed this concern, they found a high level of bitterness that perhaps transcended the cynicism about the privileges of the political class manifested in past surveys. This cynicism, it could be speculated, derived from the financial struggles many have experienced since the economic downturn of the last two years. “Others make no money. The politicians are overpaid,” said one respondent flatly. Another person stated, “I think the politicians should take a pay cut. If they did, we would have more money for education. They are living high on the hog...If they take more money away from the politicians, there will be more money for schools and law enforcement.” Another observed wistfully, “I wish politicians were more honest.” Reflecting the concern that party and special interest have overwhelmed the greater good, one respondent called for “politicians who are non-partisan and are not subsidized by big business.”

Both the general public and the opinion leaders responded to the problem of “protection, restoration, and enhancement of the environment, both urban and rural, by individuals and businesses,” by making it the sixth most critical issue facing the Portland metropolitan region is the environment. The relatively small number of comments from members of the public on this matter tended to focus on water quality, more than in past surveys—“water quality, clean up rivers;” “the environmental issue...as regards the rivers and their clean-up and maintenance;”— indicating perhaps that the protection and distribution of Bull Run Reservoir water and the publicity over the Willamette River Superfund site on Port of Portland property in 2001 made an impact on these people. There was some ambivalence about how to balance interests, reflected in this comment: “I want business to expand while keeping in mind the protection of the environment,” one person stated. “They need to find a middle ground between keeping the environment and still bring[ing]

business to Oregon.” “More pollution control.” Overall, however, the public exhibited far less interest in the environment than in the past.

For the opinion leaders, on the other hand, comments on the environment tended to focus on sustainability, perhaps because as a current concept it covers many of the specific issues that are involved in consciousness of the environment. “Development of regional land use and environmental criteria to more closely match jurisdictional practices,” one person demanded.

The seventh issue for the opinion leaders was containing growth, which was stated as “containing growth within the Portland-Vancouver urban growth boundaries while maintaining quality of life both inside and outside the boundaries.” Some respondents offered comprehensive prescriptions for accomplishing this goal, of which the thought, “containing growth calls for good design solutions and rethinking some old and outdated views...about how we develop—especially in suburban areas,” is a good example. Some of the opinion leaders were bluntly negative about the Urban Growth Boundary (UGB): “The UGB is creating an East Coast slum,” said one person. Another worried about the ramifications of development on a number of fronts, hoping to find a balance that would be positive in a number of ways: “sensible expansions to the UGB to accommodate growth of key industrial clusters and improve jobs/housing balance are important,” this individual said. One respondent was very focused on the smaller communities and their responsibilities toward growth management. “It is essential that the smaller communities, Estacada, Sandy, Molalla, Canby absorb and encourage growth in their respective urban growth boundaries,” this analysis went. It closed with the compelling observation that “Estacada is hurting, timber disadvantaged. They all have room for growth!”

Some respondents linked growth to sustainability. The key to one person was to create “...a sustainable community by stabilizing the size of our population and stopping the increase of unsustainable consumption.” “Quality construction and materials in all types of development. Good urban design and buildings built to last, and built with sustainability in mind,” another person wrote.

Open space was a concern of some. A typical comment about this factor read, we need to “assure availability of local open space including community parks.” The open space and sustainable development were linked in the comment that we should concentrate on “planning and developing the region in compact, diverse, walkable, sustainable neighborhoods and districts.”

In contrast, the general public ranked this issue #8,

although, the relatively low ranking among the public on this issue did not reflect their intense interest in or sophistication about it. Comments such as the following did, however. “Preserving farmland,” “We need to stop development and preserve farmland,” “[We] have to expand the urban growth boundary to have affordable housing.” “Keeping agriculture viable.” “Livability: more parks and green spaces and saving the farmland,” “consider expanding the urban growth boundary, decrease density in the city.”

Transportation (“supporting an expanded, diverse, affordable and integrated regional transportation system that reduces congestion and moves people and goods safely and efficiently”), was the seventh issue for the public, another issue that was unchanged from 2000. “Improve the commute from Vancouver to Portland on I-5.” Get rid of those stupid bicycle lanes. Where does the money come from to pay for those bike lanes? I feel they could give that money to the schools...I do hate those bike lanes. Bike riders do not obey the laws of the road!” “The streets in Portland need to be fixed.” “Transportation and the highway system.” “Transportation, including the light rail.” “Public transportation should be developed regionally, more than private transportation; that is, more than more roads, highways, freeways for private car use.” “More attention should be paid to traffic congestion problems,” one person said traffic congestion should be avoided by increased promotion of public transportation usage.” “Roads and sidewalks improvements [emphasis of speaker], including accessibility for all modes of transportation and people.” A couple of respondents were interested in, as one put it, seeing “more attention to roads and cars.” Some comments were prescriptive, as for instance, one person’s view that Highway 26 is poorly designed from I-5 going west and should be redesigned soon.

For the opinion leaders, housing (diverse, affordable, and subsidized housing close to jobs throughout the region”) ranked eighth, its position in their rankings in both 2000 and 1998. The unchanging position of this issue in the eyes of the group suggests the overall stability of the housing market in the region over the last decade, an observation perhaps confirmed by the low ranking for it (#10) conferred by the general public. Although most in the public who commented on the issue did so in the context of poverty and homelessness—“helping the homeless people find housing...,” “caring for the homeless;” “...rent subsidies...” were typical comments. However, one person did highlight what was perceived as the growing difficulty experienced by the middle class in the housing markets (“the price of housing and rent is too high compared to the income most people receive” one per-

son wrote), and another perceived a squeeze that narrowed the gap between the two groups because of the weak economy. This person expressed this concern thusly: “the economy and jobs are important. There should be affordable housing for individuals who earn below living wages. This should include single males and females, without children.”

Other comments betrayed an intense interest in this issue among the public despite its low ranking: “We must plan for low income and affordable housing in an equitable amount and availability. Affordable housing being of key importance [emphasis as spoken].” “Affordable housing throughout the region.” “Minority population such as the deaf and mentally challenged have access to employment and being self-sufficient.”

For both the general public and the opinion leaders, “recognizing, valuing and involving persons of diverse racial and ethnic backgrounds in our community and government decisions” was a minor issue—at least in relation to the other problems. Yet some of the most apparently intensely felt comments dealt with this topic. Interestingly, comments on diversity among the public found substance in worry about immigration. Their tone perhaps reflected insecurity in the tough economy as fear of competition for jobs and other key resources from the “other.” “Illegal immigration needs to be addressed—wasted resources on illegal immigrants. “We don’t need anymore [sic] illegal immigrants. “Stop letting foreigners into our country.” “I

don’t like these immigrants getting loans because I couldn’t get one for the world,” said one person. But another person had a different worry, observing, “the media covers all the terrible acts, very negative, creates racial prejudice, media should be censored.”

In sum, the research tells a story of a Portland metropolitan region general public and those who help shape its views, as so often in the past, urgently focusing on shoring up the area’s education system. The leavening of this “traditional” concern with a deep concern for the region’s economy suggests the extent to which funding of public services remains a problem.

VI. Appendix: Methodology and meaning of the 2002 Critical Issues List results in the SRL survey

DESCRIPTION OF THE SAMPLE

A final sample size of 1,480 was used for this report.¹ This reflects a response rate of 30.1% of a total of 5,115 calls made and resolved. An average of 1.82 calls were made to achieve the completed sample. This final sample breaks down as follows:

¹ Although the target sample size was 350 adults, 1,538 interviews were completed. After excluding ineligible respondents, the final sample size was 1,480, which far exceeds the Scope of Work. This will ultimately be a bonus for IPMS and will not, in any way, change the cost of the project.

Table 1: Respondent age by county

	N	Mean	SD	Min	Max
Clackamas	279	48.19	15.96	18	97
Clark	288	46.88	15.63	19	91
Columbia	44	50.34	15.45	25	77
Multnomah	564	43.66	17.19	18	95
Washington	263	44.45	16.42	18	92
Yamhill	42	48.40	14.98	21	82
TOTAL	1480	45.62	16.52	18	97

The overall average age was 45.62 years. Table 1 includes the average ages by county, which differed significantly ($F = 4.537, p < .001$). Post hoc comparisons revealed significant differences between Multnomah and Clackamas ($t = 1.202, p < .001$), Multnomah and Columbia ($t = 2.570, p < .01$), Multnomah and Clark ($t = 2.699, p < .01$), Washington and Clackamas ($t = 2.648, p < .01$), and Washington and Columbia ($t = 2.202, p < .05$).

Distribution by county:

The distribution of the sample is quite similar to the distribution of the population in the six counties.

Clackamas

18.9% (n=279) (compared to 16.8% of the population)

Clark

19.5% (n=288) (compared to 18.2% of the population)

Columbia

3.0% (n=44) (compared to 2.4% of the population)

Multnomah

38.1% (n=564) (compared to 35.1% of the population)

Washington

17.8% (n=263) (compared to 23.0% of the population)

Yamhill

2.8% (n=42) (compared to 4.5% of the population)

Respondent gender:

Female 54.5% (n=807)

Male 45.3% (n=670)

Respondent voting status:

Respondents were asked to answer the following question: "Did you vote in the election this past November?" Of the 1464 respondents who answered this question (10 did not know, 6 refused), 73.7% said they had voted in the election.

Respondent quality of life:

Respondents rated their overall quality of life on a scale of 1 to 10, with 1 being the worst and 10 being the best. The average rating was quite high at 7.98 (SD=1.682) and it was not significantly different by county.

Critical issues facing the Portland metropolitan region

Respondents were read a list of 10 critical issues facing the six-county metropolitan region, with the six counties identified by name. Each of the 10 critical issues was then rated by the respondents on a scale from 1 to 10, with 1 being not important and 10 being very important. Table 7 includes the number of respondents, their average rating, and the standard deviation by issue. In addition, an analysis of variance was conducted for each issue to determine if there was a significant difference when the means were compared by county.

Table 2: Respondent Marital Status

	N	Percent
Married, Partnered	814	55.7
Never Married	327	22.4
Divorced	167	11.4
Widowed	124	8.5
Separated, but not Divorced	30	2.0
TOTAL	146	100.0

¹ 17 respondents refused to answer, 1 respondent reported not knowing.

Table 3: Respondent racial group

	N	Percent
White	130	89.2
Asian/Pacific Islander	40	2.8
Black, African American	32	2.2
Native American	13	.9
Alaska Native	2	.1
Other	70	4.8
TOTAL	145	100.0
	7 ¹	

¹ 20 respondents refused to answer, 3 respondents reported not knowing.

The majority of the respondents (96.1%) did not consider themselves to be Hispanic. Table 3 represents the breakdown of groups with which the respondents identified.

Table 4: Respondent Highest Level of Education

	N	Percent
Elementary or less	6	.4
Some High School	34	2.3
High School Graduate or GED	324	22.0
Some College of Associate's Degree	550	37.3
Bachelor's Degree	348	23.6
Graduate Study or Degree	213	14.4
TOTAL	147	100.0
	5 ¹	

¹ 5 respondents refused to answer.

Table 5: Reported annual household income

	N	Percent
Less than \$15,000	113	8.6
\$15,001 to \$25,000	115	8.8
\$25,001 to \$35,000	223	17.0
\$35,001 to \$50,000	270	20.6
\$50,001 to \$75,000	308	23.5
\$75,001 to \$100,000	160	12.2
More than \$100,000	122	9.3
TOTAL	131	100.0
	1 ¹	

¹ 153 respondents refused to answer, 16 respondents reported not knowing.

As a cautionary note, it is important to present this data as “reported” annual household income due to the tendency of some respondents to inflate their response (i.e., some individuals find it humorous to report their annual income as in one of the highest categories).

Table 6: Respondent Employment Status

	N	Percent
Working Full-time	772	52.6
Retired	236	16.1
Working Part-time	223	15.2
Keeping a Home (full-time parent)	71	4.8
Looking for Work	52	3.5
Going to School	41	2.8
Unemployed, Not Looking for Work	39	2.7
Disabled, Not Able to Work	3	2.2
TOTAL	146	100.0
	7 ¹	

¹ 13 respondents refused to answer.

Metropedia: Emerging Industry Clusters and the Region's Recent Economic History

By Heike Mayer, Ph.D.
Institute of Portland Metropolitan Studies

Over the last year, the Institute has been actively involved in several projects for the "New Economy Observatory," which was created in 2001. The first project was a collaborative effort with the New Economy Coalition to analyze the region's emerging industry clusters. The second effort involved an update of the first version of Metropedia that was published in the last issue of this publication. Both projects are aimed at analyzing the region's economy to provide economic development professionals and local decision-makers with strategic information.

I. Emerging cluster study

1. INTRODUCTION

In 2001, the Institute of Portland Metropolitan Studies created the "New Economy Observatory" (NEO). The mission of NEO is to provide economic development professionals and local decision-makers with vital information regarding the performance of the region's economy. This mission came to fruition during summer and fall 2002 when NEO participated in a research project initiated by the New Economy Coalition (NEC) to identify the drivers for the region's knowledge-based economy and to propose policy recommendations for cluster-based economic development.¹

For the past several years the Institute has analyzed the region's economy from an industry cluster perspective. What are industry clusters? Industry clusters refer to an eco-system of related export-oriented firms around a specific set of applications or markets. A cluster is formed by a variety of companies that are connected to each other through supplier and buyer relationships. These firms rely on the local presence of a specialized labor pool, infrastructure, and other support services such as venture capital, business services, and educational opportunities.

In many cases, firms in clusters self-organize. For example, in 2002 a group of businesses in the field of cyber security formed an organization called Oregon RAINS. This group is actively involved in lobbying the

federal government for financing security-related projects. The businesses' mutual interest in these projects functioned as a catalyst for the cluster's organizing efforts and firms that normally compete cooperated for their mutual benefits. For regions, industry clusters are important because they contribute to their competitiveness by attracting other firms and workers. The study group employed this industry cluster perspective to investigate the performance of both existing and emerging high tech clusters in the bistate, Portland-Vancouver metropolitan region.

2. FINDINGS

Best practices

Interviews with experts in regions such as San Diego and Washington D.C. revealed several key themes related to fostering regional economic growth.² Often, a crisis or the collapse of the indigenous industry drove the need for change. In San Diego, for example, such a crisis was triggered by the decline in federal defense spending during the 1980s. In most regions, the private sector in coordination with universities and government drove economic development initiatives. Since the private sector drove the initiatives, a results-oriented model characterized organizations that were formed. This orientation in turn encouraged regional leaders to be doers rather than joiners. Entrepreneurial networks, the attraction of capital, and active technology transfer from universities contributed to regional economic success.

Emerging clusters

A variety of data sources were used to describe the level of employment, the innovation capacity, and the entrepreneurial prowess of the Portland-Vancouver metropolitan region. Our particular focus was on the high technology (hardware and software) and on the biotechnology industries.

Over the last couple of decades the Portland region has evolved into a specialized high technology center. Since 1976 high technology, defined as SIC 357: Office and Computing Machines, SIC 36: Electric and Electronic Equipment, SIC 38: Instruments and Related Products, and SIC 737: Computer and Data

¹The study group consisted of Dave Chen (OVP Venture Partners), Joe Cortright (Impresa, Inc.), Heike Mayer (Institute of Portland Metropolitan Studies), Peggy Miller (Taow Partners), Tony Nash (Zanobi Group), Eric Rosenfeld, and Ethan Seltzer (Institute of Portland Metropolitan Studies). A presentation of the work is available online at <http://www.neweconomycoalition.org/>.

²The group conducted phone interviews with three experts: Richard Seline, Founder of New Economy Strategies in Washington D.C. Mary Walshok, Associate Vice Chancellor and Dean of Extension, University of California, San Diego, and former Director of UCSD CONNECT. Mary MacPherson, Executive Director of the Morino Institute in Reston, Virginia.

Table 1: Portland's high technology specialization compared to other regions

Location Quotient (LQ) for 2000		SIC 357 Computing	SIC 36 Electronics	SIC 38 Instruments	SIC 737 Computer Services & Software	Total Location Quotient / Growth
Employment Growth						
1997 - 2000						Rate
Portland	LQ	1.59	2.63	1.41	1.19	1.74
	Growth	-7.4%	4.5%	-1.7%	10.9%	4.2%
Silicon Valley	LQ	19.7	7.26	6.92	5.46	7.32
	Growth	0.3%	1.3%	0.2%	12%	3.8%
Austin	LQ	10.58	3.32	1.04	2.16	2.96
	Growth	3.9%	3.7%	1.7%	16.5%	6.9%
Boston	LQ	2.72	1.53	2.31	1.78	1.85
	Growth	-2.7%	0.7%	-3.0%	9.8%	2.7%
San Diego	LQ	1.6	1.49	1.39	1.05	1.30
	Growth	-1.6%	4.4%	-4%	13.0%	5.4%
Seattle	LQ	N/a	0.55	1.36	2.77	1.59
	Growth	N/a	2.2%	1.1%	13.6%	9.9%
Phoenix	LQ	0.39	2.15	0.96	0.92	1.30
	Growth	-1.3%	-1.1%	1.4%	13.7%	2.8%

Source: Bureau of Labor Statistics (<http://data.bls.gov/labjava/outside.jsp?survey=ew>)

Note: A Location quotient of 1 indicates that the industry is as concentrated in the region as it is nationally. A location quotient larger than 1 indicates a higher concentration than the national average.

Processing Services, has grown on average by 5 percent annually. In 1976, total high technology employment was 17,378, while in 2000 64,891 people worked in high technology companies. Compared to other regions, this region has particular strengths in electronics and instruments. Employment in the electronics segment (SIC 36) experienced an average annual growth rate of 4.5 percent during the period between 1997 and 2000 (Table 1). Only San Diego had a similar level of growth and the same industry segment actually declined in Phoenix.

The growth of this high technology segment is mainly due to the expansion of the semiconductor industry in the Portland-Vancouver metropolitan area. One of the most prominent semiconductor makers is Intel. Intel moved to the region to establish a memory fabrication plant in Aloha in 1976 and since then has significantly expanded its presence here. Today, the company employs 14,500 people. The region is home to Intel's most sophisticated R&D and manufacturing facilities. During the 1980s and 1990s, the region attracted many other semiconductor manufacturers and a set of specialized suppliers and service providers.

Figure 1 shows the increase in employment by industry segment.

The rise of the semiconductor industry influenced the evolution of supplier industries. Today, the region hosts a range of firms specializing in silicon wafer production, semiconductor manufacturing equipment production, electronic design automation, and testing equipment. The legacy of Tektronix carries on in companies that specialize in display technology (InFocus, Pixelworks, Clarity Visual Systems, etc.). Another area of specialization is printer technology with Xerox Office Printing Business in Wilsonville (which used to be a Tektronix business unit) and Hewlett-Packard in Vancouver.

To sharpen our analysis, we focused on the kinds of innovations produced by the region's high technology firms. Patent data for the period between 1975 and 1999 was analyzed. The data reinforced the industry strengths that became apparent through our employment analysis. Portland inventors are strong in the following technology classes:

- ◆ Incremental printing of symbolic information
- ◆ Electrical computers and digital data processing systems
- ◆ Computer graphics processing
- ◆ Amplifiers
- ◆ Liquid Crystal Cells
- ◆ Television
- ◆ Information Processing System Organization
- ◆ Electricity: Power supply or regulation systems
- ◆ Optics: Image Projectors

Table 2 outlines the region's top patent holders and the number of patents they registered for.

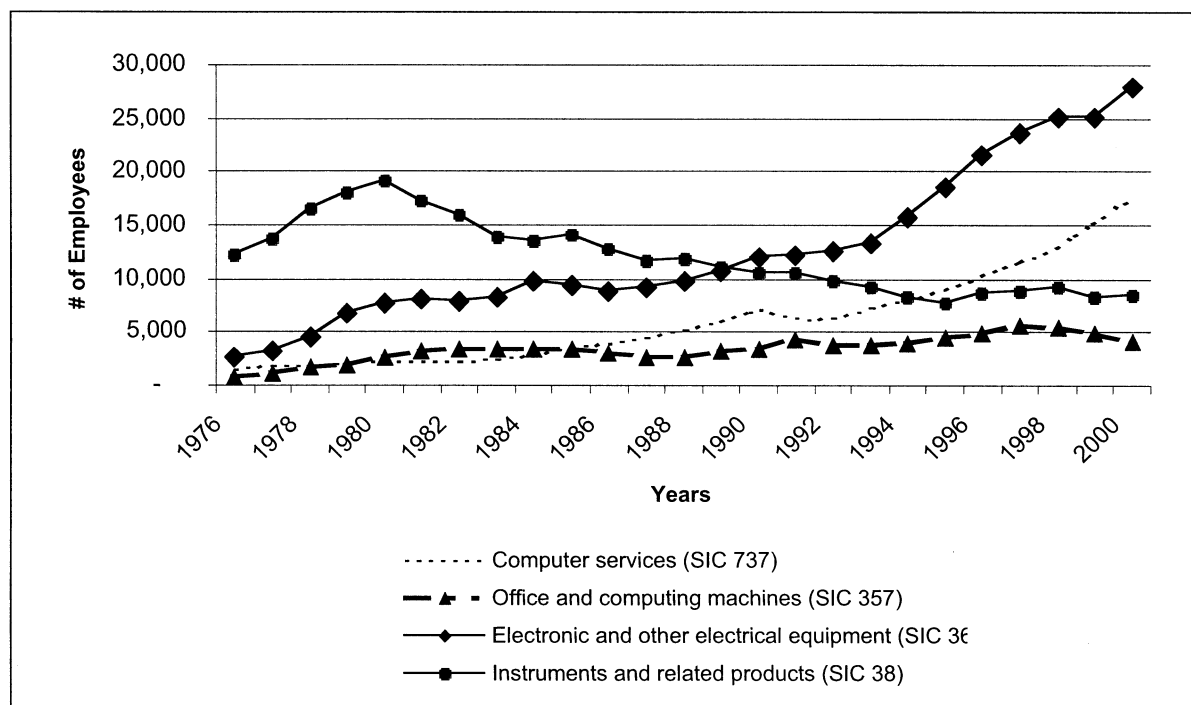
The group was also interested in analyzing Portland's position regarding biotechnology innovation. Table 3 shows the relative concentration of biotechnology-related patents as measured by location quotients. A location quotient measures the concentration of patents, which reveals the relative specialization of an area in a particular field of innovation. A location quotient of 1 means that patents in a certain technology class represent the same share of total patents in the region as it does in the national economy. A quotient greater than 1 indicates that a particular patent technology class is more prevalent in a region's economy than in the nation's economy. In the case of biotechnology patents, regions like North Carolina's Research Triangle Park, Philadelphia, San Diego, Washington

D.C., New York, San Francisco / San Jose, Boston and Seattle have higher concentration of biotechnology patents than in the nation. In fact, the Portland region is significantly below the national average regarding biotechnology patents. This suggests that the biotechnology industry does not have a stronghold in the Portland-Vancouver region when compared to other regions in the U.S.

Patent and employment data show the technological and industrial strengths the region built up over the last three decades. To gain insight into emerging industry clusters, we analyzed venture capital data for the period between 1995 and 2002. During this time, venture capital was invested in many Internet-related businesses, which is consistent with the dot-com boom that took place during this time. However, the region also attracted investments in other fields such as specialized software, health information technology, business services, networking, security software, telecommunications, and semiconductors. Table 4 shows the number of venture capital deals for the various industries.

Finally, the group analyzed data for Oregon's software competencies. To conduct a detailed economic analysis of the software industry is fairly difficult because the industry consists of many sub-segments that are aggregated within one SIC code (SIC 737). Table 5 summarizes a survey conducted by the

Figure 1: High technology employment by segment, 1976-2000



Source: Oregon Employment Department

Portland firm, Crisis in Perspective. The region's software industry specializes mainly in software that is used to produce other high technology products (such as Electronic Design Automation software which is used in the production of semiconductors).

In sum, the group concluded that the region's high

technology industry specializes in certain industry segments that are very competitive. Regarding self-organizing, most of these industry segments are in the pre-cluster stage and more efforts are needed to help with the organization and networking of industries to form cluster groups.

Table 2: Top patent holders in the Portland-Vancouver region, 1975-1999

Company	Segment	# of Patents (1975-1999)
Tektronix	Test & Measurement Instruments	1,416
Intel	Semiconductor	1,301
Hewlett-Packard	Printers	296
Sharp Microelectronic Technology	Display / Semiconductor	63
Cascade Microtech	Test & Measurement Instruments	40
SHE America	Silicon Wafers	39
InFocus Systems	Display	38
Triquint Semiconductors	Semiconductors	36
Analog Devices	Semiconductors	32
Planar Systems	Display	31
Electro Scientific Industries	Test & Measurement Instruments	27
Seiko Corporation	Transmission Equipment	26
Lattice Semiconductor	Semiconductors	24
NEC America	Semiconductors	21
Sharp Laboratories of America	Display / Semiconductors	21

Source: U.S. Patent and Trademark Office

Table 3: Location quotients for biotechnology patent classes

Region	Drug, Bio-Affecting and Body-Treating Compositions (Class 424)	Chemistry: Molecular Biology and Microbiology (Class 435)	Drug, Bio-Affecting & Body-Treating Compositions (Class 514)	Multicellular Living Organisms & Unmodified Parts Thereof and Related Processes (Class 800)	Location Quotient (LQ) Total Biotech
Research Triangle Park	1.72	3.56	3.18	5.86	2.99
Philadelphia	1.5	1.53	3.71	1.02	2.45
San Diego	1.53	3.59	1.54	1.38	2.13
Washington D.C.	1.91	2.84	1.26	1.30	1.89
New York	2.04	0.99	2.07	0.27	1.7
San Francisco / San Jose	1.34	2.10	1.02	0.93	1.41
Boston	1.54	2.16	0.88	0.46	1.41
Seattle	1.07	2.01	0.68	0.11	1.15
Portland	0.3	0.61	0.22	0.71	0.36

Source: U.S. Patent and Trademark Office

3. RECOMMENDATIONS

Based on the insights from the research on best practices in other regions and on the data analysis, the group developed five recommendations. These are

- ◆ The private sector must lead new cluster development.
- ◆ The region has to build, recruit and retain a stable of experienced new economy executives to drive industry cluster development and growth.
- ◆ Greater cooperation and coordination is needed within the region's infrastructure for cluster development and stewardship (universities, economic

Table 4: Number of venture capital deals by segment in the Portland-Vancouver region, 1995-2002

Technology Segment	1995	1996	1997	1998	1999	2000	2001	2002	Total # of Deals 1995-2002
Internet services	4	3	5	4	19	22	17	4	78
Specialized software	3	3	5	4	8	9	4	3	39
Health IT	2	3	2		5	3	6		21
Business services			4	1		8	2	2	17
Networking	2	2	2		3	4	1		14
Security software / internet		1	1	1	1	5	2	1	12
Telecommunication		1		2	2	4	2		11
Semiconductors		1	1	1	2	2	3		10
Sensor technology			2	3	1	2	1		9
Fault gas analyzers		2	4	1		1			8
Multimedia software	2	1	1	1	2	1			8
Biotechnology / Life sciences	1	2	2		1			1	7
Consumer products		1	2		1	2	1		7
Display	1		1	2		1			5
IT consulting / services		1	1		1	2			5
Medical instruments			4	1					5

Source: PricewaterhouseCoopers MoneyTree Survey

Table 5: Oregon's software competencies

Software Competencies
- Electronic Design Automation (EDA)
- Custom Software
- Software Tools
- Infrastructure (i.e. Message/Routing Services, Messaging & Cryptic, Network, Filtering, Directory Services, Retail Services)
- Geomatics (Utilities, Mapping Software)
- Game Development
- Medical / Health-related
- Agriculture / Nursery-related
- Building / Construction-related
- Human Resources
- Education

Source: Survey by Crisis in Perspective, Inc.

development agencies and industry support organizations like the Oregon Technology Alliance, New Economy Coalition, Software Association of Oregon, American Electronics Association, Association of Oregon Industries, etc.).

- ◆ The region needs to focus on low risk/high return efforts like assisting the organization and networking of industries to form cluster groups, as with Oregon RAINS within cyber security.
- ◆ Government should focus on creating and sustaining a competitive environment and high quality of life to attract and encourage private sector firms that add to identified regional strengths within areas of software, hardware and bioscience/biotechnology.

These recommendations are already at work in the Portland region. High technology leaders are currently working on efforts to recruit and retain seasoned managers and executives. The Portland Development Commission has launched a high technology industry cluster recruitment program. NEO will continue to analyze industry cluster performance on a regular basis. Whether these initiatives, and others, will successfully build and sustain the region's high tech clusters in an environment of intense global competition remains to be seen. Nonetheless, developing strategies for economic development based on the innovative capacity of area clusters will be a crucial step towards a

more sustainable economic future.

4. WANT TO KNOW MORE ABOUT INDUSTRY CLUSTERS AND REGIONAL ECONOMIC DEVELOPMENT?

- ◆ For the past several years, the Institute conducted a variety of industry cluster studies. They can be accessed at <http://www.upa.pdx.edu/IMS/current-projects/neo.html>. We are currently working on a cluster monitor project.
- ◆ The Institute is currently staffing for the Metropolitan Economic Policy Task Force (MEPTF). Part of the mission is to review existing economic development strategies and to analyze for common themes, possible conflicts and gaps. The group's review is based on an extensive inventory of the region's economic development strategies which can be accessed online at <http://www.upa.pdx.edu/IMS/currentprojects/mep.html>
- ◆ Harvard professor Michael Porter heads the Institute for Strategy and Competitiveness and maintains an extensive website on cluster development: <http://www.isc.hbs.edu/index.html>
- ◆ Portland economist Joe Cortright and Massachusetts-based Andrew Reamer put together a helpful website that can aid with analyzing regional economic data. The website links to many data source providers: <http://www.econdata.net/>

Table 6: Summary of industry clusters in the Portland-Vancouver region

Industry	Industry Cluster
Hardware	Semiconductors
	Semiconductor Manufacturing Equipment
	Silicon Wafers
	Test & Measurement Instruments
Software	Computers
	Display & Imaging Technologies
	Printers
	Electronic Design Automation
	Custom, Tool, Infrastructure Software
	Geomatics
	Game Development
	Agriculture / Nursery
	Human Resources, Education
Building/Construction	
Bio-Science / Biotechnology	Few in medical devices
	Health IT

II. Metropedia updates

1. INTRODUCTION

The analysis of the region’s clusters provides us with a detailed view of our industry strengths and the drivers of the knowledge-based economy. Historical data on broader economic trends help us understand the context for economic development. “Metropedia” was designed to describe a variety of socio-economic trends in the region. The project was called “Metropedia” because we wanted to associate the research with the notion of an “encyclopedia,” which is “a comprehen-

sive reference work containing articles on numerous aspects of a particular field.”

In this case, we are interested in “numerous aspects” of this metropolitan area. Our goal with Metropedia is to provide members of this metropolitan community with a wide-ranging view of the things shaping our current conditions and future choices. What follows is an update of a selection of socio-economic variables that describe the region’s socio-economic dynamics.

2. METROPEDIA VERSION 2.0

Table 7: Employment and average pay in select industry clusters ⁴

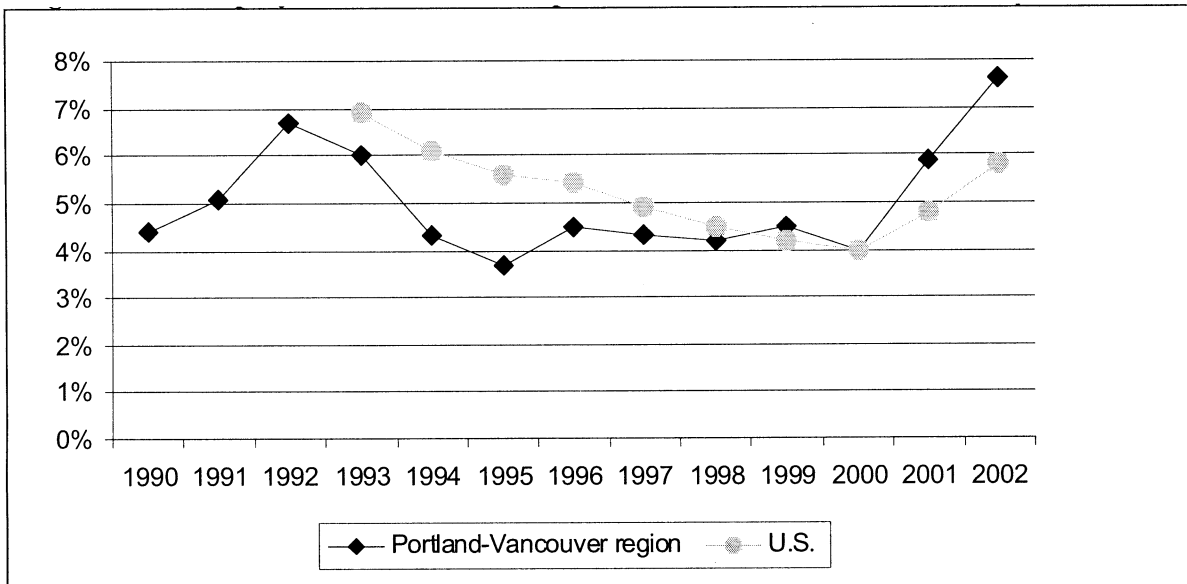
Industry cluster	Total Employment in 2001	Average pay in 2001
Agriculture and forestry	29,399	\$26,282
Metals, Machinery & Transportation equipment	45,957	\$50,939
High technology	68,149	\$68,339
Nursery	4,216	\$24,062
Wood & Paper products	17,195	\$42,514
Creative Services	30,007	\$55,203

Source: Oregon Employment Department, Washington State Employment Security Department

The high technology industry cluster is part of a broader set of clusters in the region. Table 7 describes 2001 employment and average pay for a select number of industry clusters that play an important role in our economy. These clusters export goods outside the region and in return bring new dollars that can be spend locally.

⁴ The industry clusters are defined as follows: High tech: SIC 357, 36, 38, 737; Metals/Machinery/Transp. Equipment: SIC 33, 34, 35, 37; Agriculture & Food Processing: 1-9, 20; Nursery: SIC 0181, 0781, 0782, 0783, 5193, 5261; Wood & Paper Products: SIC 24, 25, 26; Creative Services: SIC 731, 733, 737, 78, 7922, 8743. For Clark County, data for SIC 357 was suppressed due to concerns about confidentiality.

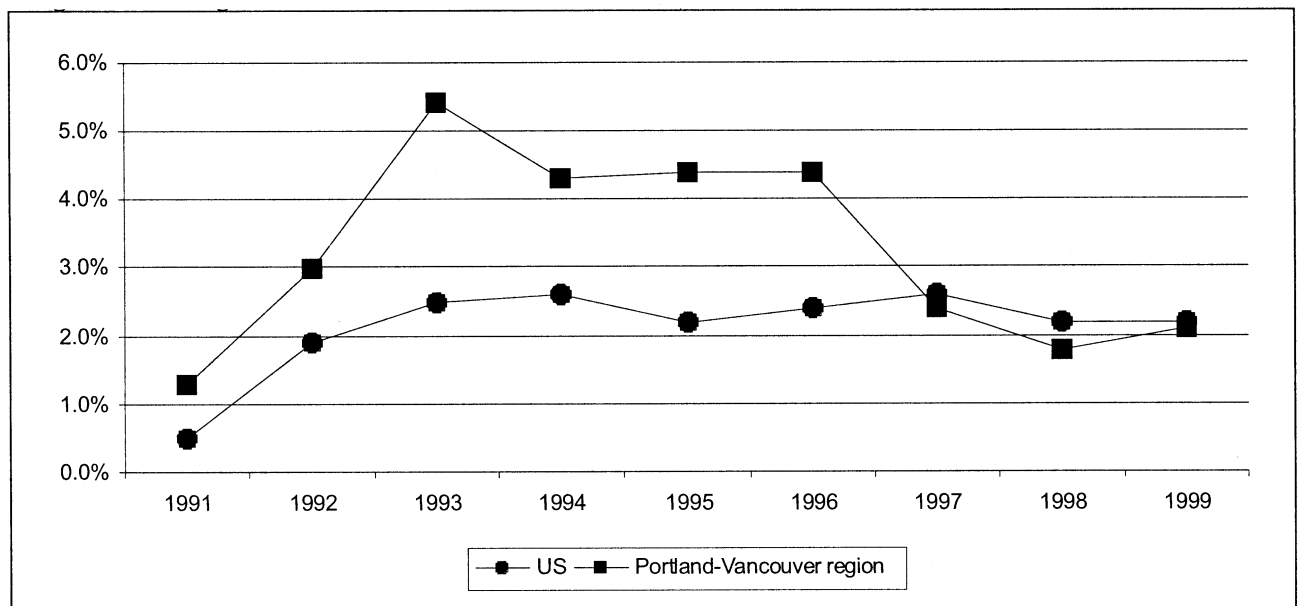
Figure 2: Unemployment rate in metropolitan area has risen dramatically*



* Unemployment rate change year to year
 Source: Bureau of Labor

As reflected in recent news stories, the region has experienced a significant rise in unemployment over the last two years (see Figure 2). The average unemployment rate in 2002 was 7.6 percent. This is significantly higher than the rate of 6.7 percent in 1992, which was the latest peak. Oregon ranks among the states with the highest unemployment rates and the rate in the Portland-Vancouver region exceeds the state's unemployment rate. The region's economy is very vulnerable to economic cycles because manufacturing industries have a strong presence in this area and are typically hit hardest in a recession.

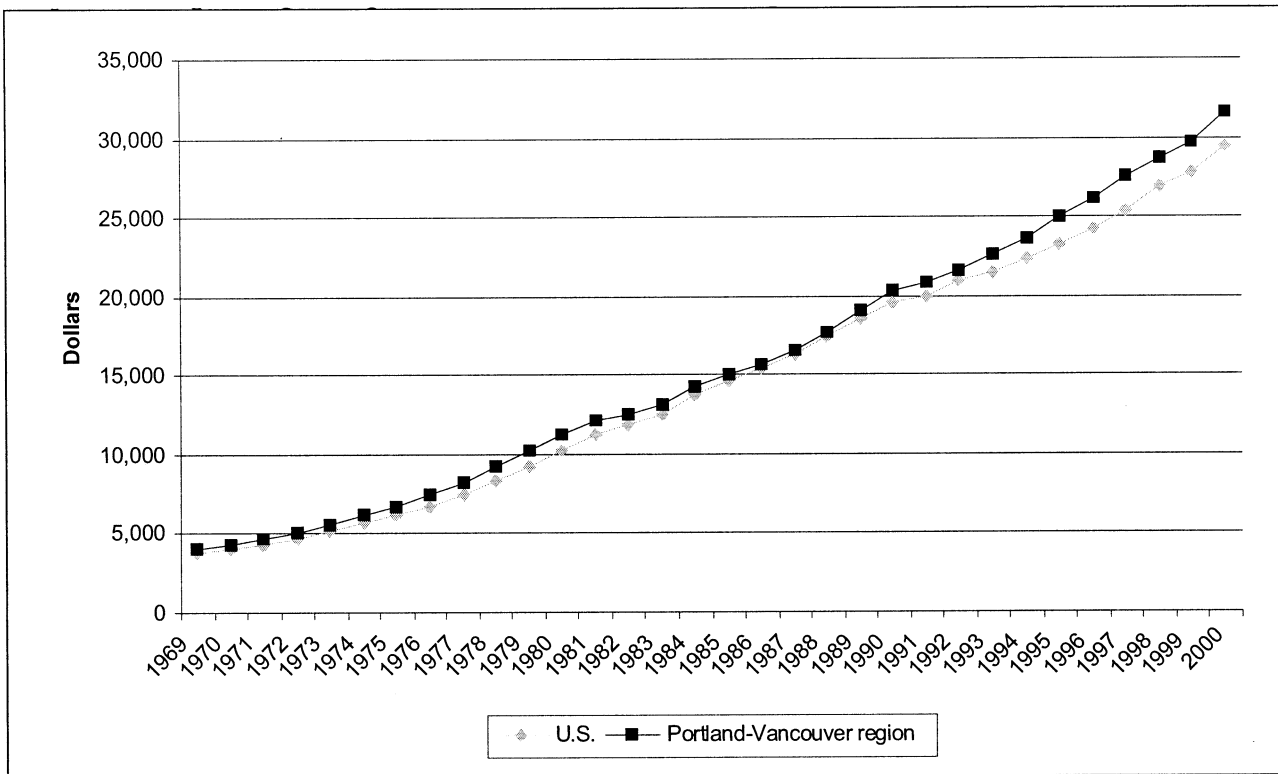
Figure 3: Job growth has slowed*



*Percentage change over previous year
 Source: Bureau of Labor Statistics

The changes in unemployment rates over the last 12 years reflect the trend in job growth (Figure 3). During the early 1990s the region experienced fast job growth. Consequently the unemployment rates dropped. Job growth considerably slowed down after 1996 and increased slightly in 1999.

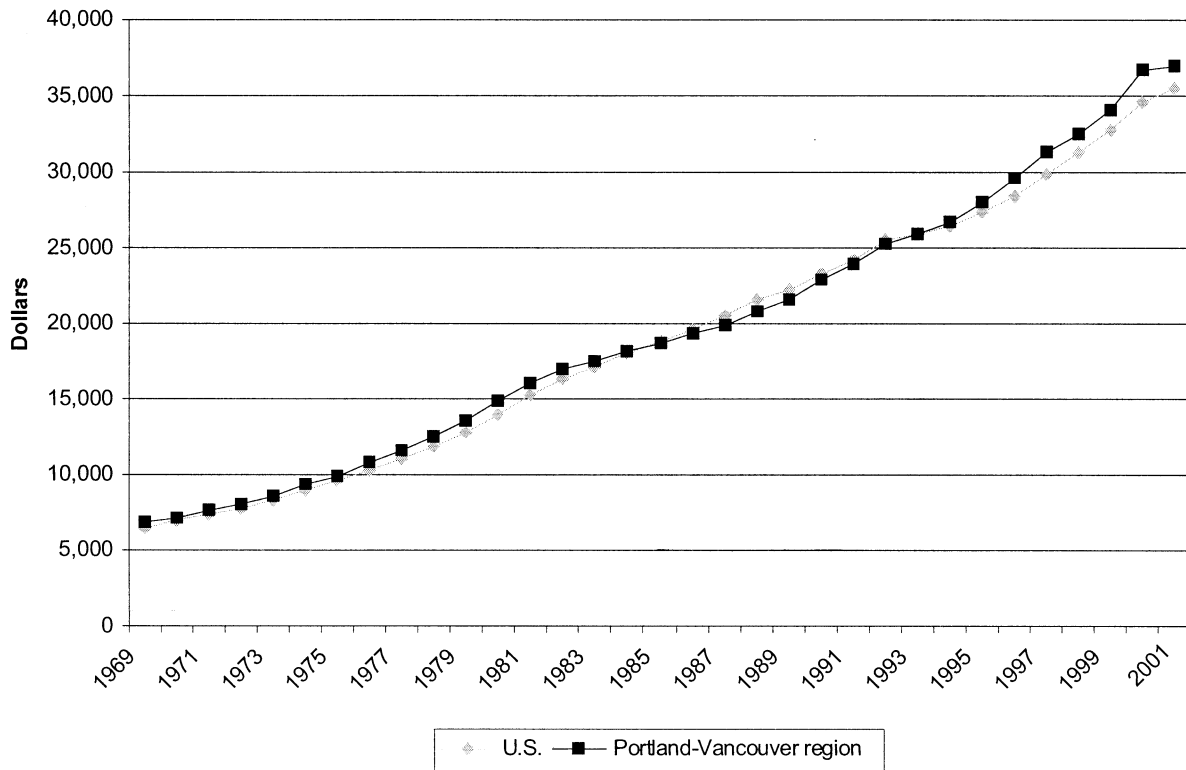
Figure 4: Regional per capita income above U.S. average*



*Per capita income
 Source: Bureau of Economic Analysis

Despite high unemployment rates and slowing job growth, regional per capita income has continued to increase over the last three decades (see Figure 4). Per capita income in this region has been consistently above the national average during this time. In 2000, per capita income was 7.2 percent higher than the national average.

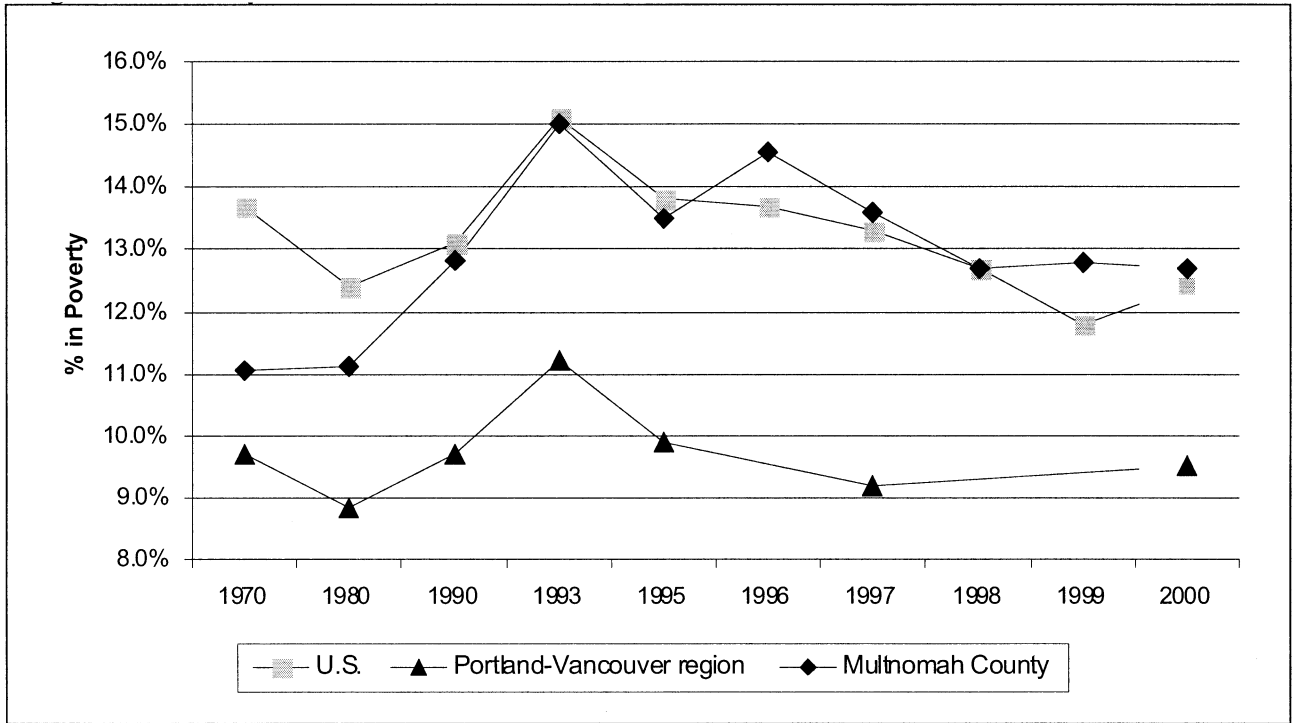
Figure 5: Average wages are decreasing slightly



Source: Bureau of Economic Analysis

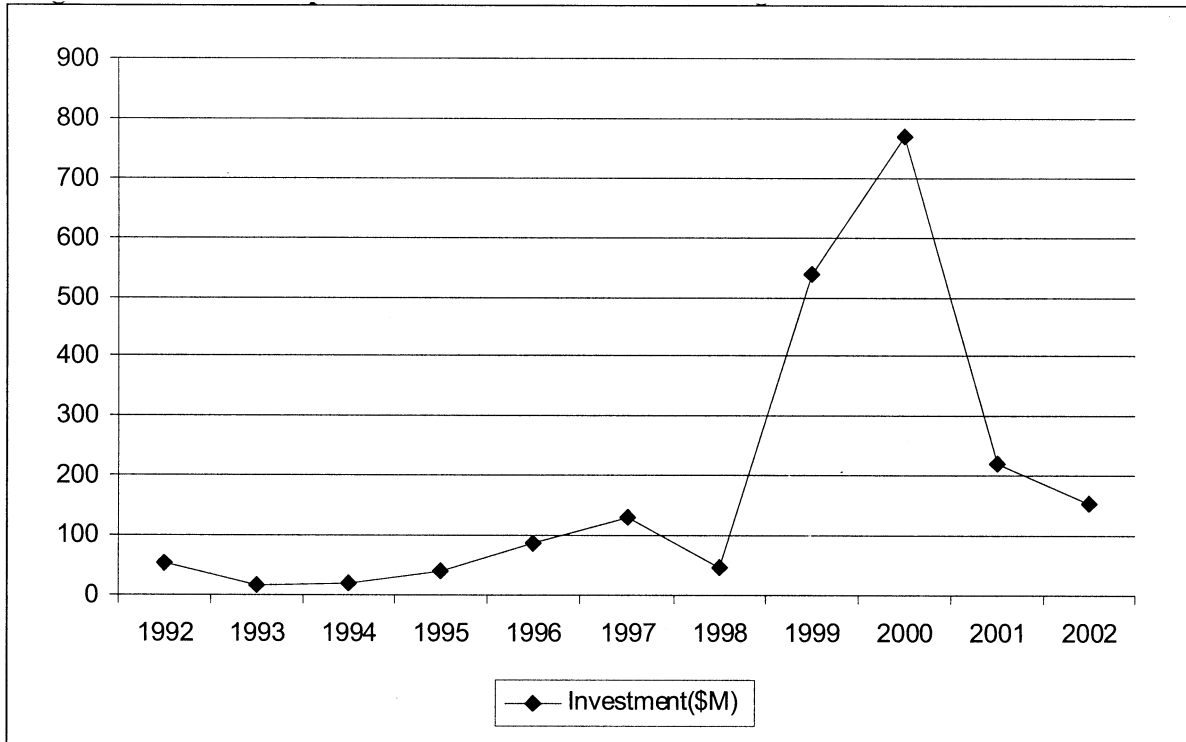
Average wages have also increased in the 1990s (see Figure 5). However, between 2000 and 2001 we can observe a slower increase in average wages: In 2000, the average wage in the region was \$36,706 and in 2001, the average wage accounted for \$36,990, which is only \$284 higher than the 2000 average.

Figure 6: Poverty rates



Source: U.S. Census Data, 1990, 2000, American Community Survey Profile 1996, 1997, 1998, and 1999, Current Population Survey, Census Bureau, 1997 and 1999

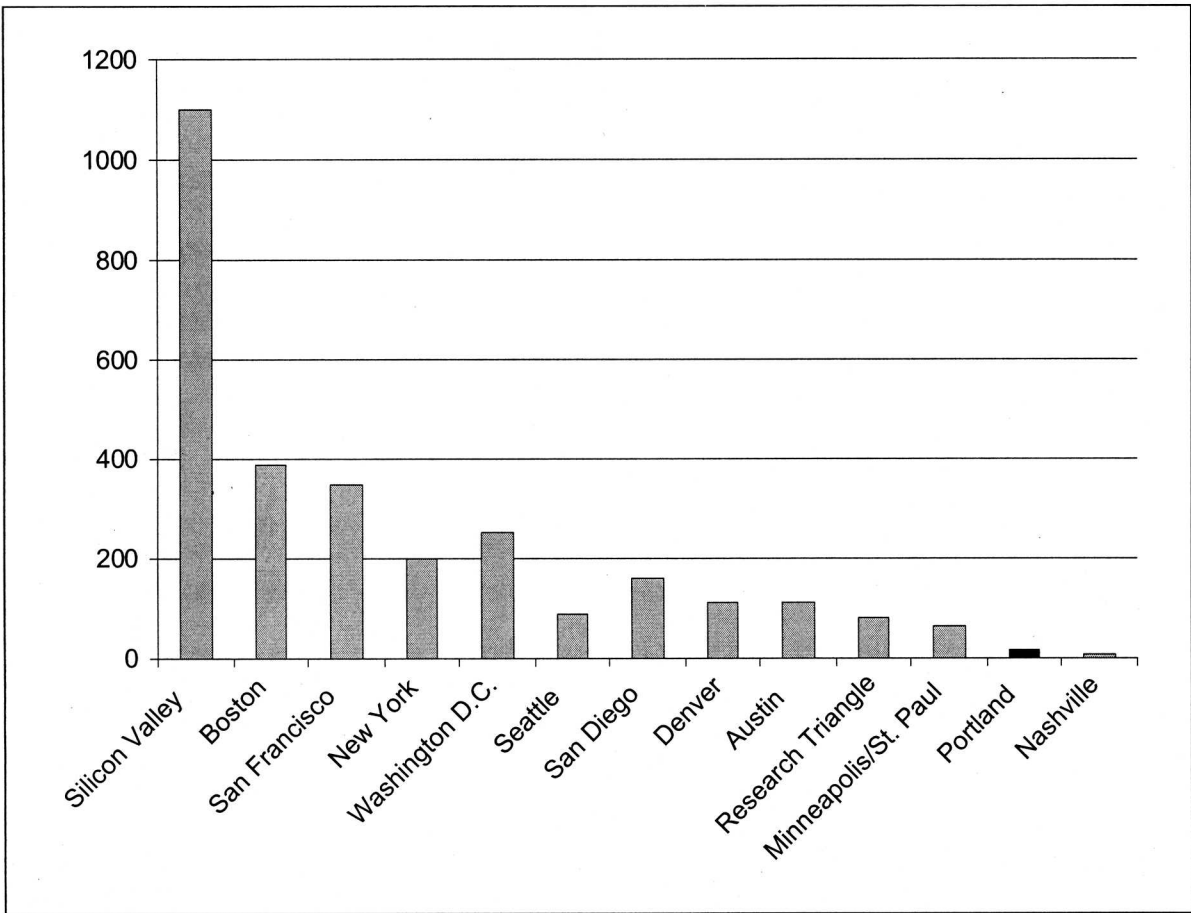
The latest data on poverty from the Census 2000 indicates that poverty rates have risen from 9.2 percent in 1997 to 9.5 percent in 2000. Multnomah County's rate has dropped from 13.6 percent in 1997 to 12.7 percent in 2000 while Washington County's poverty rate has risen from 7.1 percent in 1995 to 7.4 percent in 2000. Poverty rates also decreased in Yamhill County (11.2 percent in 1995, 9.2 percent in 2000) and in Clark County, Washington (9.3 percent in 1995, 9.1 percent in 2000).

Figure 7: Venture capital investment declined after significant rise*

*Millions of dollars
Source: VentureEconomics

During the latter half of the 1990s, the region's economy experienced an inflow for venture capital. This was the time of the dot.com boom and heavy investments in Internet-related startups. Venture capital investments peaked in 2000 at \$770 million and declined rapidly to \$154.1 million in 2002.

Figure 8: Metro Portland does not capture as much venture capital in 2002



*Millions of dollars
Source: VentureEconomics

Compared to other regions, the Portland metropolitan area does not attract as much venture capital. In 2002, regions like Silicon Valley, Boston, San Francisco, New York, Washington D.C., San Diego, the Research Triangle Park, and Minneapolis/St. Paul attracted more venture investments.

Table 8: 20 to 34 year-olds want to live here

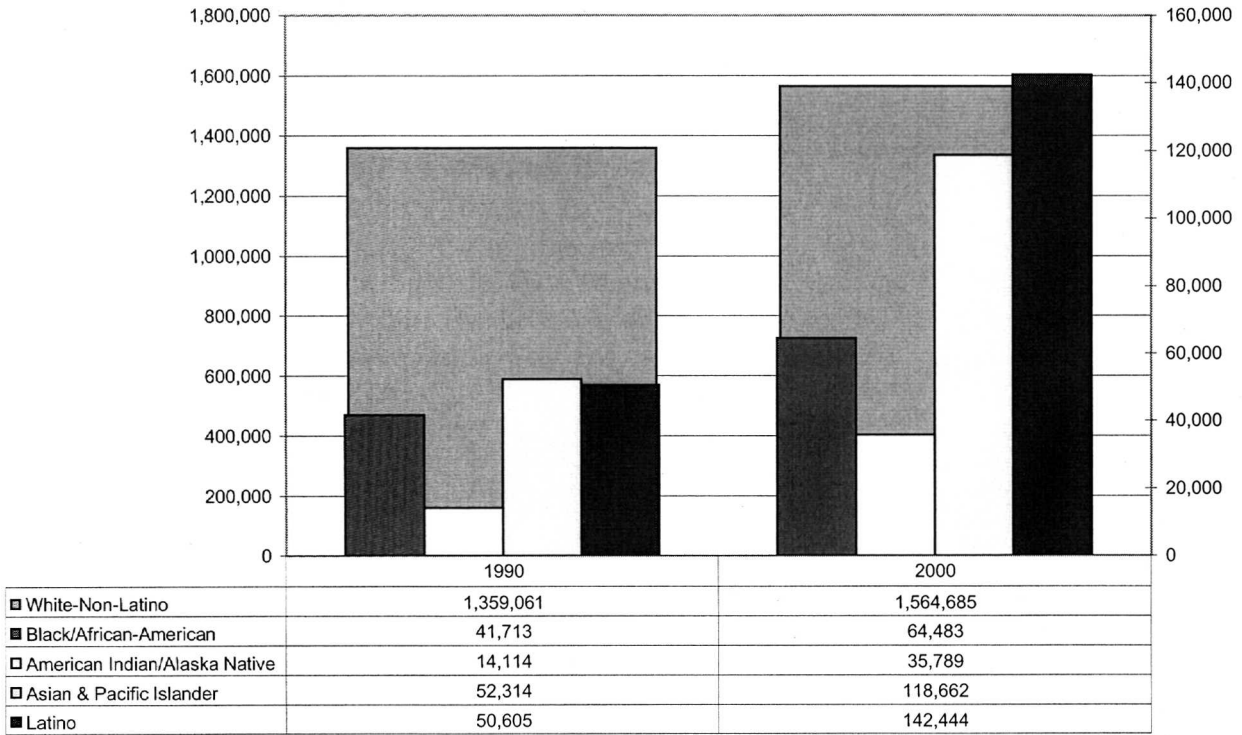
	Total 1990-2000 change in	Percent change 1990-2000 in	Hispanic 1990-2000 Gen X change	Non-Hispanic Gen X change 1990-2000	2000 Population total Gen X 20-34 years old
USA	4,776,384	9%	3,496,979		58,855,725
Rural U.S.	-741,993		287,896		10,289,736
All Cities (by MSA)	5,518,377	13%	3,209,083		48,565,989
Metropolitan Regions					
Las Vegas, NV—AZ	170,395	99%	73,600	96,795	342,646
Austin-San Marcos, TX	137,597	64%	51,787	85,810	352,015
Naples, FL	15,030	60%	9,582	5,448	39,970
Phoenix-Mesa, AZ	264,907	55%	133,312	131,595	747,424
Atlanta, GA	353,189	54%	94,843	258,346	1,006,431
San Francisco-San Jose, CA	148,519	53%	30,918	117,601	431,139
Denver-Boulder-Greeley, CO	167,863	52%	62,043	105,820	489,274
Raleigh-Durham-Chapel Hill, NC	105,406	52%	29,107	76,299	308,170
Fayetteville-Springdale-Rogers, AR	24,349	50%	8,280	16,069	73,135
Miami-Fort Lauderdale, FL	102,579	49%	44,756	57,823	313,698
Dallas-Fort Worth, TX	275,150	46%	155,331	119,819	867,517
Boise City, ID	31,263	46%	5,825	25,438	99,026
New York-Northern New Jersey-Long Island, NY-NJ-CT-PA	52,193	45%	20,734	31,459	167,102
Reno, NV	21,600	42%	10,551	11,049	72,765
Seattle-Tacoma-Bremerton, WA	149,445	37%	27,751	121,694	548,997
Portland-Vancouver-Salem, OR-WA	115,621	37%	34,669	80,952	425,486
Orlando, FL	96,617	37%	44,596	52,021	359,658
Charlotte-Gastonia-Rock Hill, NC-SC	94,283	37%	29,468	64,815	347,544
West Palm Beach-Boca Raton, FL	48,800	36%	21,904	26,896	184,339
Myrtle Beach, SC	10,746	35%	1,916	8,830	41,303
Wilmington, NC	12,611	34%	1,742	10,869	50,137
Fort Collins-Loveland, CO	15,228	33%	2,346	12,882	61,589
Nashville, TN	68,831	32%	14,359	54,472	283,483

Source: Austin American Statesman (<http://www.austin360.com/aas/specialreports/citiesofideas/genx/1207genxtable.html>)

The region's successful economic track record in the 1990s was accompanied by an increase in the population of 20 to 34 year olds, the so-called Generation X. From 1990 to 2000, the number of Generation Xers declined in more than a third of the country's cities. It also declined significantly in rural areas. In the Portland-Vancouver-Salem Consolidated Metropolitan Area - the geographic unit for which data was available - the number of Generation Xers increased by 37 percent from 1990 to 2000. This demographic trend is in part responsible for the high levels of educational attainment in the Portland metropolitan area. Approximately 32 to 34 percent of the region's population possesses a bachelor's degree or more, compared with an average 28 percent for all U.S. metropolitan areas. Young educated people are important for the continued prosperity of a region and knowledge-based industries in particular benefited from the influx of Generation Xers.

Figure 9: Portland-Vancouver is increasing in racial/ethnic diversity

Population by Race/Ethnicity 1990 and 2000 Portland Metropolitan Area
Note: Race Categories Are Not Strictly Comparable



*Note: Population by Race/Ethnicity 1990 and 2000, Race Categories are not strictly comparable
 Source: Population Research Center, Portland State University

The region is not only an attractive place to live for certain age groups, such as the Generation Xers, but also for people from different racial and ethnic backgrounds. From 1990 to 2000, the Portland metropolitan area diversified significantly regarding the different racial and ethnic groups as shown in Figure 9. The Latino population increased by more than 64 percent.

A Regional Economic Development Strategy for Our Region?

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Introduction: The Metropolitan Economic Policy Task Force

The most recent national recession and the weak recovery we're currently experiencing have been felt most acutely here in the Pacific Northwest. For a number of months, this metropolitan area posted the highest unemployment rate among metropolitan areas in the nation, and both Oregon and Washington have generally led the nation in unemployment with little substantial relief in sight.

This has turned attention forcefully to the economy and economic development, a marked contrast with the attention paid to those topics during the 1990's, a period of tremendous growth and prosperity in this metropolitan area and the Pacific Northwest. Though the economy has not displaced all issues at the top of the lists of area leaders, it is clearly a key concern. Calls for assertive steps towards economic recovery and development have reappeared here after an unprecedented 17-year hiatus between recessions.

Both the third phase of the Regional Industrial Lands Study (<http://www.upa.pdx.edu/IMS/currentprojects/rils.html>) and the analysis of the economy of the westside of the region developed by the Westside Economic Alliance (www.westside-story.org) concluded that a regional strategy was called for. Neither study reviewed existing economic development policies and strategies, but both identified a need for some sort of overarching element. In addition, the recently completed work of the Portland Development Commission's Blue Ribbon Committee (<http://www.pdc.us/programs/ed/strategy/index.html>) identified the Regional Economic Development Partners as the lead entity for coordinating economic development activities in the metropolitan area, and that the Partners will likely play an expanded role in the future.

In addition, metropolitan areas in other parts of the United States and around the world are beginning to develop regional economic strategies. Several other efforts well known to this region, particularly in places like Austin, Texas, and San Jose, California, have pioneered the organization of efforts to advance high tech

economies at a metropolitan scale. To date, this region has not responded in a coordinated fashion, and as a consequence, seems to be falling behind its competitors at a crucial time in our economic history.

Charge . . .

In response to these conditions, the Regional Economic Development Partners called for the creation of a Metropolitan Economic Policy Task Force at the institute. (<http://www.upa.pdx.edu/IMS/currentprojects/mep.html>).

The mission for the Task Force is to review adopted and emerging local, regional, and state economic development strategies to identify:

1. Common themes;
2. Possible conflicts and gaps; and
3. Opportunities and best practices for linking economic development objectives to land use and transportation planning and implementing actions and investments in the Portland-Vancouver metropolitan area.

The report of the Task Force will be the basis for clarifying the nature and extent of economic development strategy needed and desired at the regional level. It will help to clarify the distinction between region-level economic development objectives or strategies and local-level objectives or strategies. The final report will pay particular attention to gaps at the metropolitan level in strategy or policy, and ways in which those gaps could be filled in the near future.

Note that the Task Force has not been asked to develop a regional economic strategy. Rather, the Task Force has been empanelled to inventory, for the first time, what we, as a region, are doing, and then what the metropolitan region needs to do next to reinforce its strategic economic goals.

This is path-breaking work. Our metropolitan area has never before considered what an economic development strategy matching the breadth of the regional economy might look like, whether we have one, or whether additional components are required. The work that the Task Force will do will set the stage for the ways in which strategic approaches to metropolitan economic development get incorporated in a range of public and private initiatives.

The state of strategy today . . .

To begin the work of the Task Force, the Institute of Portland Metropolitan Studies developed two surveys of current economic development activity. The first is a survey of 66 nonprofit organizations in the metropolitan area whose mission focuses on advancing the economic development of one or more communities in the region. The second is an inventory of economic strategies currently being employed by all cities, counties, and regional agencies in the metropolitan area. In addition, we identified a range of economic strategy efforts in other metropolitan regions around the world to provide examples of what a regional strategy might look like.

This report summarizes our review of economic development activities in the metropolitan Portland region. We report our findings in the form of the answers to four questions:

1. What is strategy?
A strategy establishes a vision of how our region will differentiate itself economically from our competitors, and how various aspects of what we do will fit together to accomplish this vision.
2. What is the status of current economic development plans?
Current economic plans mostly address specific tactics employed by local units of government to enable and encourage incremental real estate development. While they recognize connections between localities and the region, they focus on the local jurisdiction.
3. What are our competitor regions doing?
Regions are now recognized as the critical unit of global economic competition. Our competitors have developed specialized institutions for coordinating regional economic strategy, some public, some private, but all with a strong public-private collaboration. These institutions deal explicitly with issues of positioning, vision and assessment. They promote dialog and collaboration, but don't dictate to member institutions.
4. What are the gaps in our effort?
The region has no explicit strategy. Specifically, it lacks a process for articulating its collective vision, positioning metro Portland against competitor regions, developing and promoting its brand, and encouraging collaboration and consensus to realize this strategy. There are broad commonalities in many of the elements of local plans, and arguably the region has benefited from quality of life as a strategy. Many tactics have been well implemented.

Detailed findings

1. WHAT IS STRATEGY?

The first and most basic question that the Task Force has to address is what it means by economic strategy. It

will be difficult to assess whether in fact the Portland economic region has a strategy, or whether the strategies that it does have are adequate, unless we have a clear definition of what we mean by strategy.

Drawing from our analysis of the relevant literature we have developed the following definition of economic development strategy: A strategy establishes a vision of how our region will differentiate itself economically from our competitors, and how various aspects of what we do around the region will fit together to accomplish this vision.

Michael Porter of the Harvard Business School has studied business strategy extensively and also written on economic development (Porter 1996). Although there are a number of important attributes to strategy, Porter stresses that the essential element of any strategy is differentiation. In Porter's words, "competitive strategy is about being different. The essence of strategy is choosing to perform activities differently than rivals do."

Besides differentiation, there are several other important elements of strategy that Porter emphasizes. First, Porter notes that efficiency alone does not constitute a strategy. In other words, it isn't sufficient to simply try to be more efficient or lower-cost than one's competitors because such an approach can easily be imitated.

Second, Porter argues that strategies necessarily involve trade-offs between competing attributes, that no one competitor can excel in every possible aspect of competition. Consequently businesses have to choose those areas in which they are going to be exceptional and recognize that in other areas their performance might only be acceptable.

Third and finally, Porter argues that a key element of strategy is achieving a tight fit among the various activities one pursues. Effective strategies consist of a series of mutually reinforcing actions have taken together constitute a differentiated and defensible position in the marketplace. In the case of Southwest Airlines, for example, the route structure, cross-training of crews, and rapid boarding all complement and reinforce one another as a means of lowering costs.

While Porter's analysis is directed specifically at businesses, it has great applicability to economic development strategy. (Porter, author the Competitive Advantage of Nations is a highly sought after consultant to national and regional economic development efforts.) Like businesses, communities have to make the same choices and about what their strategy will be. Communities have to differentiate themselves, make trade-offs and fashion strategies that have a good fit among their various activities. Efficiency alone is not a sustainable basis for economic strategy because it does

not establish those defensible, relatively sustainable areas in which our region will excel.

In an analysis prepared for the Council on Competitiveness, Porter and his colleagues outlined the case for, and key elements of a regional economic strategy. The executive summary of this report, *Clusters of Innovation: The Regional Foundations of US Competitiveness*, is reproduced in Appendix A of the Inventory Document. Their major points can be summarized as follows:

- ◆ A shared economic vision helps elicit broad support and coordinate activities
- ◆ Strong leadership is a necessary part of any successful economic development strategy
- ◆ An overarching organization for economic development helps coordinate and routinize the process
- ◆ Broad-based collaboration is needed for development strategies to succeed
- ◆ Rigorous analysis is an important early step in implementing a regional strategy, but mechanisms for translating ideas into action are necessary
- ◆ Regions need to overcome transition points in the development of their economies

Source: (Porter, Monitor Group et al. 2001)

In summary, there are a number of important hallmarks of effective economic development strategy. Strategies need at the outset to identify how a community or region will differentiate itself from its competitors and how the various elements of its strategy fit together to give it a defensible competitive advantage. Good economic development strategies should clearly state their goals and provide an ongoing basis for measuring progress toward their attainment. An essential element of strategy is a clear understanding of who one's competitors are and where one stands in relation to them. This includes both national and international competitor regions. Finally it may be just as important for strategies to rule out certain types of activities, as it is to identify those things one will pursue.

2. WHAT ARE METROPOLITAN PORTLAND ORGANIZATIONS DOING IN ECONOMIC DEVELOPMENT?

Some 40 jurisdictions and parts in the bi-state, six-county metropolitan area were interviewed regarding their economic development plans, activities, and strategies. In summary, we found that:

1. A focus on place was apparent in the work of a large majority of respondents. Priorities include development and redevelopment activities as well as land use policies related primarily to industrial land capacity through expansion of the urban growth boundary and through changes to zoning. Initiatives related to infrastructure and improve-

ments to city services are also a priority, particularly among some smaller cities. Some "place-making" efforts were identified (e.g. the City of Beaverton's efforts to create and important new focal point for a revived downtown Beaverton through the "Beaverton Round" light rail station project) with key geographic areas typically being downtowns and commercial centers. Lastly, quality of life is generally acknowledged as a significant issue, a resource, but a by-product of a strong economy.

2. Major economic development accomplishments typically cited were specific development and redevelopment projects or firm recruitments and expansions.
3. The most frequently mentioned obstacles to economic development were place-based. These included the supply of developable land, business climate and recruitment issues, along with infrastructure concerns and problematic locations on the periphery of the region that were more commonly cited by rural jurisdictions. Some respondents cited people-based issues dealing with education and workforce development. Others expressed capacity concerns, both with having the resources to undertake economic development and also with the degree of public support and quality of leadership for economic development.
4. Respondents identified the importance of partnerships with other economic development groups, city, county, state and regional entities, and some private firms, as well as private sector actors like chambers of commerce. Industry associations are rarely mentioned as partners. Some distinction is apparent between rural areas that more often cited "vertical partnerships" for example with state government, and urban areas that more often cited "horizontal partnerships" among local economic development agencies.
5. Further analysis was conducted of documents from nine jurisdictions that reported having adopted economic development strategies or policies beyond the minimally required comprehensive plan language and/or development plans for specific purposes such as urban renewal. These include:
 - a. City of Beaverton
 - b. City of Gresham and East Multnomah County
 - c. City of Hillsboro
 - d. City of Portland
 - e. City of Sandy
 - f. City of Tualatin
 - g. City of Vernonia
 - h. Clackamas County
 - i. Clark County
 These plans generally incorporate industry-based

policies including recruitment and retention as well as business climate policies related to taxation, regulation and business cost. References are also made to entrepreneurial development activities. Further, while there are some references to the regional scale of the economy, when targeting occurs it is sometimes industry-focused rather than driven by regional industrial clusters.

Some jurisdictions with adopted plans include people-based policies. These frequently express an interest in living-wage jobs that connect these activities to industry-based policies. References to K-16 education are common. Some jurisdictions utilize public-private consortium for education and workforce development activities (e.g. Gresham, Forest Grove). In some instances multiculturalism is specifically referenced (e.g. Hillsboro).

Our survey of 66 nonprofit organizations engaged in economic development resulted in a 36% rate of return. In summary, groups reported:

1. Few organizations explicitly serve the metropolitan region. Of the respondents to the survey, 13 served single communities or portions of the metropolitan area, 6 worked statewide, 3 viewed the metropolitan area as their territory of interest, and one reported no particular geographic base.
2. When asked to report the top 3 economic development issues of concern to their organization, the most frequent response was business (and hence, employment) retention, expansion, and relocation. Coming in with only slightly more than half as many responses was infrastructure development.

a. Retention, expansion, relocation	14
b. Infrastructure	8
c. Business climate (permitting)	6
d. Land	5
e. Education	5
f. Workforce Development	2
g. Technology Transfer	2
3. When asked what the greatest economic development challenge in the region was today, respondents grouped their answers under three themes: jobs, lack of a pro-business attitude, and leadership. When asked what they thought would be the greatest challenges in five years, both education and attitude were mentioned multiple times, but other responses spanned a wide range of concerns indicating little consensus.
4. Respondents reported that the top economic development assets of their community were quality of life, talented people, and infrastructure. Note, however, that quality of life was by far the most important themes. When asked what they thought were

the top assets regionally, they largely stuck with the same three themes.

5. Almost every organization has a mission statement. Key mission statement themes are promoting economic growth, supporting existing businesses, and advocating for policies and projects that will enhance economic opportunities.
6. Most frequently reported economic development initiatives include advocacy for infrastructure projects (especially transportation), business retention, expansion, and relocation assistance, advocacy for changes in the business climate (largely changes in regulatory provisions and processes), and organizational development (development of strategy and vision statements, and seeking new members).
7. When asked what their most important economic development achievements were, most organizations reported the development of strategy and accompanying research, development of infrastructure and buildings, and organizational development.
8. Primary partners locally included other economic development groups, cities and counties, and industry associations. Regionally, other economic development groups, cities/counties/the state, and regional agencies were identified as key partners.
9. When asked what indicators are used to judge area economic health and vitality, organizations reported the unemployment rate and building activity as key measures. Many organizations reported either no indicators or no specific indicators. When asked how they assess their own economic development success, organizations reported that job growth, calls to them for service, and attendance at organization-sponsored events were important measures.
10. Finally, when organizations were asked what it currently takes to compete with other metropolitan areas for talented, creative people, quality of life and the environment were the primary factors mentioned. When asked what it would take in five years, quality of life was again identified as the primary resource, though employment opportunities in clusters and resolution of Oregon's tax structure were also mentioned.

Taken together, we found that interest and involvement in economic development is widespread throughout the region. All of the region's counties, most of the region's cities, and many of the region's special districts and other quasi-governmental agencies have either economic development plans or ongoing economic development activities. Much of the work in economic development is closely related to local government responsibilities for land-use planning and the provision of infrastructure. Since these activities are in part driven by economic development, and because economic

development is influenced by planning and infrastructure, there is a necessary relationship between the two.

We offer five broad conclusions about the nature of local economic development plans and efforts. First, local economic development planning and activities are primarily concerned with incremental physical development. Economic development is generally equated with real estate development—as identified by the building or expansion of a business on a particular physical site. Other forces that influence economic activity, for example the general level of human capital, the availability of investment capital, the development of new ideas and the like are rarely mentioned in economic development plans.

The IMS survey of jurisdictions and agencies showed that 14 jurisdictions listed “expansion, retention and relocation,” as a top concern, 8 listed infrastructure, and only 2 listed either workforce development or technology transfer. Land supply and infrastructure are the two most commonly cited obstacles to economic development in local economic plans. This isn’t surprising, given that most plans (and the ongoing responsibilities of most economic development agencies) are closely related to physical development.

Second, these local economic development efforts mostly address the various tactics that will be employed in encouraging economic development. A “tactic” can be defined as a specific action, policy or investment. Typical economic development tactics include designating land for commercial or industry growth, undertaking an infrastructure project to serve such land, or recruiting a particular company.

The tactical focus of economic development programs is clearly reflected in their performance measures and program accomplishments. Many jurisdictions do not have performance measures; those that do are as likely to focus on activity levels and caseloads, rather than jurisdictional changes in overall economic indicators.

Accomplishments are typically noted through lists of completed projects rather than through specific economic outcomes. Ongoing economic development programs promote incentives and particular projects to encourage specific businesses to build or expand their facilities.

Third, most economic development plans and activities around the region recognize the connections between the local jurisdiction and the larger region. There are clearly important economic connections between different parts of the region, in terms of a common regional economy, flows of workers to employers around the region, and a shared regional infrastructure.

It is also quite common for jurisdictions to report

that they view other entities around the region as their partners in economic development. These plans and activities generally stop, however, at comparisons and connections to other places in the region. They don’t usually deal with the competitive position of this region in relation to other regions.

Fourth, a striking theme is the extent to which quality of life is viewed as an economic development asset. Not only do jurisdictions within the region perceive that they individually have a strong quality of life, they also perceive that it is a regional strength as well. Many survey respondents also identified quality of life as an important competitive factor.

Fifth, many economic development efforts (as well as recently adopted or revised economic development plans) are embracing the notion of industry clusters as a basis for understanding the economy and organizing economic development efforts, though not all plans use the term “cluster either consistently or accurately. A cluster is a geographically proximate group of inter-related firms connected by common markets, technologies and frequently buyer-supplier relationships. A cluster is not synonymous with an entire industry sector. Portland has identified a series of industry clusters as part of its latest Economic Development Strategy, as has Beaverton.

3. WHAT ARE COMPETITOR REGIONS DOING IN ECONOMIC DEVELOPMENT?

Regions are increasingly becoming the most important units for understanding the geography of economic competition. Our historic perspective, of competing nation states struggling for development, or our more narrow domestic view of states competing against one another for business investment, is increasingly out of date. Today, the real competition seems to be among metropolitan regions that have developed strong specializations or clusters in specific industries.

There is a growing recognition among economists, business strategists and geographers that especially in a knowledge based economy, the crucial competition is between different metropolitan areas and their ability to nurture successful industry clusters. Recognized scholars from such diverse fields as economics, international trade theory and political science, like Harvard’s Michael Porter and Robert Putnam (Putnam, Nanetti et al. 1993) and Paul Krugman (Krugman 1995), are pointing to the critical role that metropolitan regions play in driving economic progress.

This is a common view among business strategists, who recognize the value of regional location to private competitive success. Rosabeth Moss Kanter, also from Harvard, argues that businesses’ local linkages, particularly their relationship-based social capital formed in

cities, is a decisive advantage (Kanter 1995). Japanese scholar Kenichi Ohmae, has gone so far as to write of the “End of the Nation State,” and argues that city-centered regions will be the dominant locus of economic competition from here on out (Ohmae 1995).

The emphasis on region has a very practical implication for economic development strategy. One’s competitors may not be adjacent states or even nearby metropolitan areas, but similarly situated metropolitan areas in other parts of the globe. So, for example, when the Government of Finland commissioned the Paris-based Organization for Economic Cooperation and Development to study the competitiveness of its largest metropolitan area, they chose to compare Helsinki with Dublin, Tel Aviv, and Portland, the three economies judged to be most economically similar (Organization for Economic Cooperation & Development 2002).

As part of our analysis, we examined the structure, history, and work products of a number of regional economic development efforts around the US, and in other advanced economies around the world. (For a complete listing of the relevant plans, see the Inventory Document, page 78).

Particularly in the past decade, many of our competitor regions have moved aggressively to establish their own institutions for regional economic strategy. While there is no single model-organizational arrangements are invariably tailored to the specific contours of the local policy environment-there are broad similarities among these efforts. The key elements of our competitor regions efforts include:

- ◆ A mix of public and private membership, emphasizing strong collaboration, and generally independent of any body with specific implementing authorities.
- ◆ An organization that focuses on establishing a vision of a preferred economic future and positioning the regional economy, as a whole, to compete in the global economy.
- ◆ An emphasis on identifying the industry clusters that drive the regional economy, and developing initiatives that will promote their competitiveness.
- ◆ An organization that provides information and promotes dialog and collaboration on the regional economy, but doesn’t dictate policy to member institutions.

4. WHAT ARE THE GAPS?

Given what we know about the essential elements of strategy, what our region is doing today, and what our competitors are doing, we’re now in a position to ascertain the gaps in our performance. In short, within the Portland metropolitan area, there is a strong and

robust portfolio of economic development programs and activities, and while we have a collection of tactics, some very effective, there is no explicit economic strategy. We may have, in effect, enjoyed the benefits of an implicit strategy that bolstered our quality of life.

Although individual jurisdictions have their own statements of economic goals, there is no over-arching set of regional development goals or objectives. At the regional level, Metro defers to the economic development components of local comprehensive plans in complying with the state’s Goal 9 for economic planning. Regional transportation and land use planning efforts treat economic variables passively, as the output of statistical forecasts, rather than as policy outcomes they are seeking to influence.

Unlike competitor regions, Portland lacks a diverse, recognized public-private forum, independent of any single implementing agency, for discussing the region’s economic future and providing the organizational basis for developing strategy. No single region-wide group takes responsibility for identifying competitor regions, monitoring the region’s performance vis-à-vis these competitors, developing a wide-shared positioning statement defining how metro Portland will compete, and coordinating common actions on economic development. No one is managing an agreed upon regional “brand.”

We can summarize our analysis graphically in a two-by-two matrix, as shown in Table 1. Economic development efforts, broadly defined, can be thought of as either regional in scope or local, and can also be divided into tactics and strategy. Most of the economic development efforts in the region are operated at a sub-regional level (by cities, counties and other special units of government) and deal with the specific tactics needed to support industrial development (the lower left hand quadrant of our chart).

Cities and counties often express their development aspirations-strategy-in their comprehensive plans or in explicit strategies, like the Portland Development Commission’s recent plan (the lower right hand corner). A number of regional activities represent tactics that benefit the economy, for example, infrastructure planning and development, especially the regional transportation system, which has a major impact on economic activity (upper left hand corner).

What’s generally missing, and where regional economic strategy belongs, is in the upper right hand corner of the chart-statements of vision, competitor analysis branding, and benchmarking.

Regional economic strategies differ from tactics in a number of important ways. The key differences are summarized in Table 2. Tactics-local economic development efforts-are usually specific policies or actions,

dealing with particular sites within the region, they tend to be under the control of a single jurisdiction, and address immediate to longer term issues, and represent the prescriptive often legally binding action of the jurisdiction in question.

In contrast, a strategy (as is typically used in our competitor's metropolitan areas) deals primarily with positioning and the overall direction of economic activity, it contrasts one's home region with that of competitors, and deals primarily with long term issues, involves a wide range of partners in a consensual process, where partners retain their autonomy, because the plan is non-binding.

In conclusion, though the Task Force will not deliver its final report until June, it appears that there is a

role for a regional strategy that complements rather than replaces the mix of tactics and strategy in play at the local level. Rather than becoming a substitute for local efforts, a regional economic strategy can enable the metropolitan area to think long-term and strategically about how it will differentiate itself economically from other metropolitan areas across the globe.

The world is changing quickly. What we once believed were unassailable competitive advantages are now being associated with metropolitan regions in both the developed and developing world. Clarifying our inherent strengths and building on our distinctive knowledge competencies at a metropolitan scale is where we need to start to find whatever our economic future will be.

Table 1: Where does regional strategy fit

Geography	Tactics	Strategy
Regional	(Marketing)	Vision Competitor Analysis Brand
Local		Benchmarking Coordination
	Zone land (city/county) Permitting Incentives Projects	Comprehensive Plans

Source: Impresa, Inc.

Table 2: Differences Between Tactics and Strategy

Characteristic	Tactics/Local Plans	Strategy
Content	Specific Actions	Positioning, Direction
Geographic Scope	Site Specific	Region vs. Others Regions
Timing	Immediate to Long Term	Long Term
Involvement	One jurisdiction	Many Partners
Authority	Prescriptive, Often legally binding	Collaborative with Autonomy
Assessment Metrics	Activity Measures	Regional Performance

Source: Impresa, Inc.

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Note: "Inventory Document" is the Metropolitan Economic Policy Task Force Inventory Document prepared by the New Economy Observatory, Institute of Portland Metropolitan Studies, Portland State University, November 2002.

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Population Dynamics in the Portland-Vancouver Metropolitan Area

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The Population Research Center provides a research and teaching focus for the investigation of the causes and consequences of demographic change, with a special focus on Oregon and its counties and cities. The Center houses the Oregon State Data Center, the lead agency in Oregon for contact and collaboration with the U.S. Census Bureau and for dissemination of census data and documents. The Center is also responsible for developing state and local population estimates and projections. Staff at the Population Research Center hold academic appointments in the College of Urban and Public Affairs at Portland State University, where a large portion of their activities are directed toward the production, analysis, and dissemination of population information, such as school enrollment forecasts, survey research on population issues, and social and economic factors affecting demographic change. For more information regarding the Center and the U.S. Census Bureau, please see <http://www.upa.pdx.edu/CPRC/> and <http://www.census.gov/>.

December 3, 2002

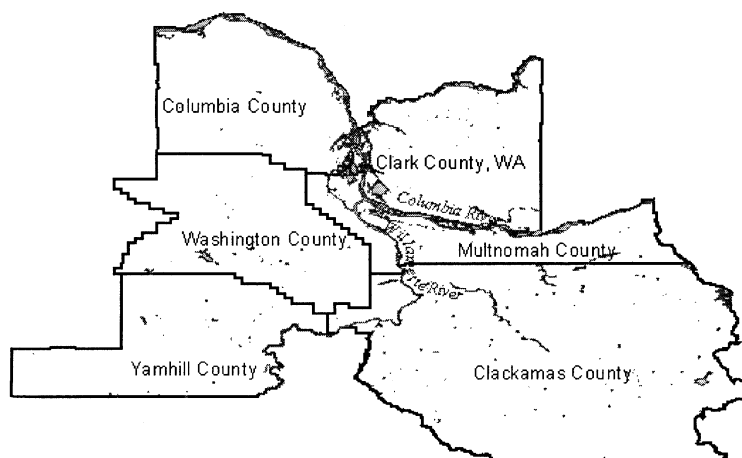
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While many people both inside and outside Oregon retain the image of the state as a place of picturesque coastal bluffs, Mt. Hood and other mountain peaks, and large forests, the state's population is primarily urban and has been for many decades. In 2000, three-quarters of Oregon's 3.4 million residents lived in towns and cities. And almost one-half of Oregon's population lived in the metropolitan Portland area.

This paper offers an overview of population dynamics in the metropolitan Portland-Vancouver area: current trends for population growth in its counties; the effect of births, deaths, and migration on population growth; how the age, sex, and ethnic composition are changing; and where residents live within the metropolitan area. Finally, the paper summarizes likely growth prospects and their implications.

The metropolitan Portland-Vancouver area includes five of Oregon's thirty-six counties—Clackamas, Columbia, Multnomah, Washington, and Yamhill — and Clark County in the state of Washington. Figure 1 shows a map of the metropolitan area, including its six constituent counties. This paper refers to the Portland-Vancouver metropolitan area as the total metropolitan area, including the Oregon and Washington portions. We refer to the metropolitan Portland area when limiting discussion to the five Oregon counties.

Figure 1. Portland-Vancouver Metropolitan Area



Population growth

Population growth in metropolitan Portland-Vancouver historically has exceeded growth for the United States, but the differential in growth rates has declined over time. Between 1990 and 2000, the United States grew by about 13 percent and metropolitan Portland-Vancouver increased by almost 27 percent. The ratio of population growth for metropolitan Portland-Vancouver compared to the United States from 1990 to 2000 exceeded 2.0, meaning that the metropolitan areas grew at more than twice the national average.

RECENT GROWTH

Metropolitan Portland-Vancouver has steadily increased its population since 1990, growing from 1.5 million in 1990 to 1.9 million in 2000, an increase of 400,000 people or 27 percent. About 1.6 million or 82 percent of the total metropolitan Portland-Vancouver population resided in Oregon in 2000.

The metropolitan Portland population—limiting attention to the five metropolitan counties in Oregon—grew from 1.3 million in 1990 to almost 1.6 million in 2000, an increase of 23 percent. Clark County, Washington experienced the most rapid population growth during the 1990 to 2000 period, despite Washington state’s population increase of 13 percent, the national average. The higher rate of growth in Clark County affected the total Portland-Vancouver growth rate. The total metropolitan growth rate of 27 percent reflects the growth rate of 23 percent for the five Oregon counties and the 45 percent for Washington’s Clark County.

During the same 1990-2000 period, Oregon’s state population increased at a slightly lower rate of 20 per-

cent. Because the metropolitan Portland population expanded more rapidly than the Oregon population, an increasing proportion of the Oregon population was in the metropolitan Portland area (see Figure 2). At the beginning of the decade, in 1990, 45 percent of Oregon’s population lived in the five counties of metropolitan Portland; by 2000, this percentage increased to 46 percent.

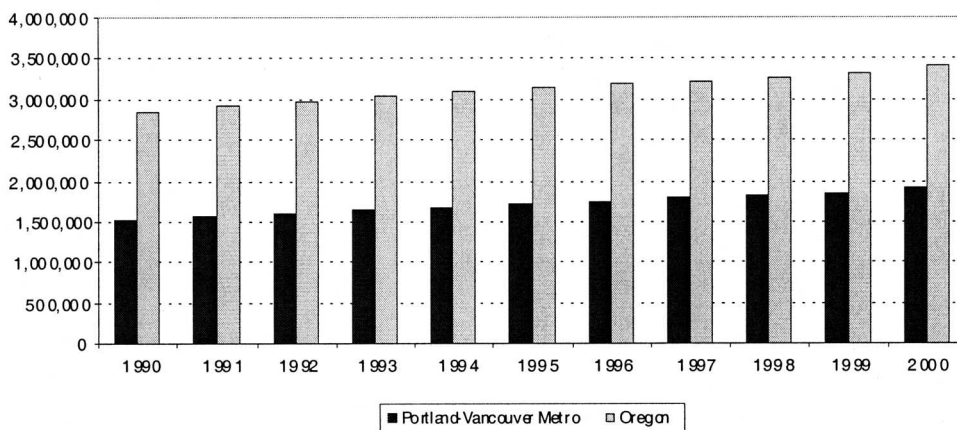
Population growth can be viewed in either absolute or relative terms. Washington County was Oregon’s fastest growing county in metropolitan Portland - in both absolute and relative terms. Washington County added 134,000 new residents to the metropolitan area from 1990 to 2000, an increase of 43 percent. Yamhill County was the second fastest growing county in relative terms, increasing 30 percent and adding 19,000 residents. Multnomah County added 77,000 residents during the same period, although its 13 percent growth was the smallest change in relative terms of metropolitan Portland counties.

NATURAL INCREASE

Population growth depends on changes in three factors: birth, deaths, and migration. The difference between births and deaths is called natural increase. In most populations there are more births than deaths, and the population grows from natural increase. If immigration is insufficient to counter-balance negative natural increase, the population declines. In most cases, however, both natural increase and net in-migration contribute to a growing population.

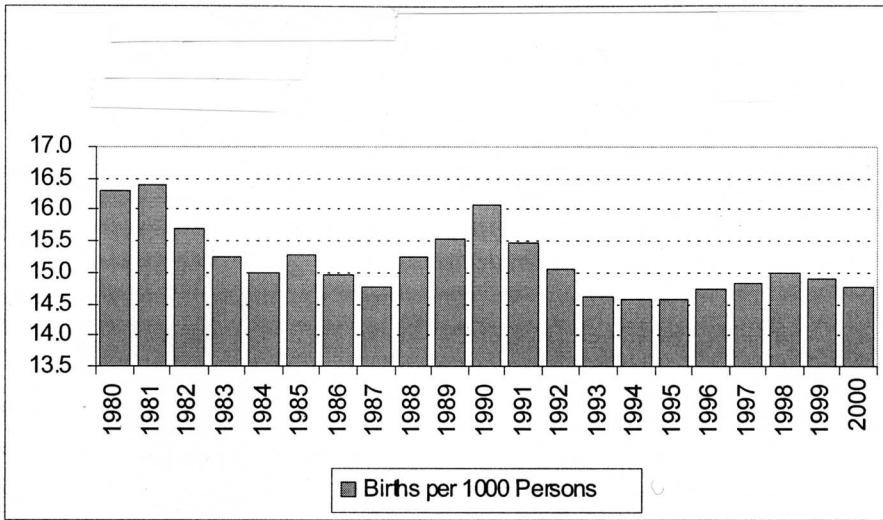
Both mortality and fertility levels have remained fairly steady in the metropolitan Portland-Vancouver area for the past two decades. The crude death rate

Figure 2. During the 1990s half of Oregon’s population growth occurred in the Portland Metro area



Source: U.S. Census Bureau and Oregon Population Reports produced by the Population Research Center

Figure 3. Metropolitan Portland birth rate has fluctuated since 1980



Source: Oregon Department of Human Services, Center for Health Statistics

(the number of deaths per 1,000 population) has remained at about 8 per 1,000 since 1980. In 2000, life expectancy at birth in Oregon was 74.6 years for men and 80.6 years for women in 2000, slightly higher than the U.S. national average for men and women. Life expectancy increased from 68.4 years for men and 76.2 years for women in 1970.

The crude birth rate (the number of births per 1,000 population) has moved within a narrow range of 14 to 17 per 1,000 since 1980. The crude birth rate decreased from 1981 to 1987, fluctuated up and down from 1987 to 1993, and remained slightly over 14.5 since 1993 (see Figure 3).

At present fertility levels, the average couple in the metropolitan Portland-Vancouver area has about two children by the end of their childbearing years. In order to exactly replace the population, couples need to have 2.1 children. Present metropolitan fertility levels are slightly less than the replacement level. In the long run, the metropolitan population would decrease at a very slow rate if there were no net in-migration.

Natural increase contributed about 18 percent of the metropolitan Portland-Vancouver area's growth from 1990 to 2000. The area's overall population growth of 452,000 was comprised of a natural increase of 134,000 and an estimated net in-migration of 318,000.

The metropolitan Portland-Vancouver area population is relatively young, with a sufficient number of people in the childbearing years to produce a sizeable number of births, offsetting fertility levels that are somewhat less than the long-term replacement level. Since 1990, there have been about 26,000 births and 13,000 deaths annually in the metropolitan area,

adding about 13,000 people each year through natural increase.

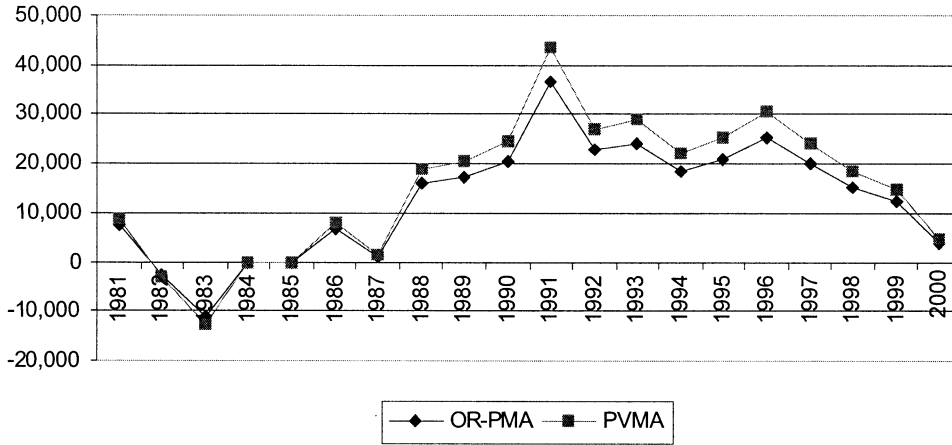
Fertility and mortality levels do not vary greatly among the six Oregon and Washington counties of the metropolitan area. The annual number of births and deaths, however, are affected by modest differences in the age composition of the different counties. Overall, there are only slight differences in the rates of natural increase for the metropolitan counties.

NET MIGRATION

Migration is the main factor affecting population growth in the metropolitan Portland-Vancouver area. Net migration into the metropolitan area has been positive since 1980, except for an estimated out-migration of about 10,000 people during the economic downturn in 1982-3. Economic conditions and employment opportunities were especially strong from 1988 to 1998 as evidenced by net migration levels at 20,000 and above (see Figure 4, which shows net migration for the Oregon portion of the metropolitan area and for the total Portland-Vancouver area). There were particularly high levels of net in-migration to the metropolitan area from 1990 to 1992 with annual net migration exceeding 40,000. However, as of 2000, net in-migration has decreased to a decade low of about 5,000 persons.

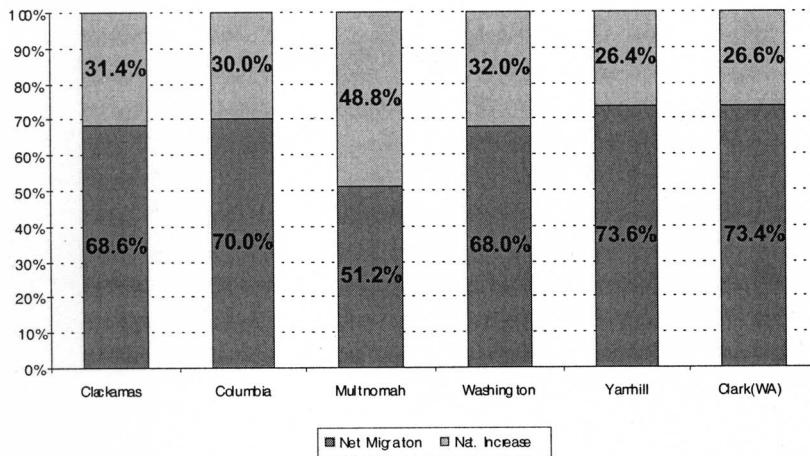
Migration accounted for more than two-thirds of the area's population increase from 1990 to 2000, and provided more than half of the increase for each of the area's counties (see Figure 5). Clark County, Washington experienced a net gain of about 79,000 from migration during 1990 to 2000, with migration accounting for almost three-fourths of its overall

Figure 4. Net migration into the metropolitan area experienced a large increase during the 1990s



Source: U.S. Census Bureau and Oregon Department of Human Services, Center for Health Statistics

Figure 5. Most of the growth during the 1990s was due to migration although there are differences between counties



Source: U.S. Census Bureau and Oregon Department of Human Services, Center for Health Statistics

cent of the total annual immigrants to the United States during the 1990's.

In the metropolitan Portland area about two-thirds of the immigrants reported by the Immigration and Naturalization Service in 2000 came from only seven areas: Russia and other countries of the former USSR (18 percent of all immigrants), Mexico (17 percent), China (7 percent), Vietnam (8 percent), India (5 percent), Korea (3 percent), and the Philippines (3 percent). The most unique aspect about the metropolitan area's immigration is the relatively high proportion of immigrants from the former USSR — primarily from Russia. The proportion of Russians among Portland's immigrants is more than twice the national average. Since immigrants to the metropolitan area are generally younger than residents, in addition to affecting the ethnic composition, they contribute to a somewhat younger age composition.

But, immigration does more than change the age or ethnic mix of the population. The presence of migrants with different skills affects economic growth, adding new workers to the metropolitan labor force and, in some cases, providing needed skilled employees for local industries with job shortages.

Although foreign-born men are somewhat more likely to be in the high-education, high-paying jobs, they are also far more common in low-education, low-paying jobs. Compared with native-born men, immigrants are found in some occupations requiring high levels of education, such as college teachers and engineers, as well as some occupations requiring little schooling, such as tailors, waiters, and unskilled service occupations. The picture for immigrant women is

similar. Foreign-born women in the metropolitan area are disproportionately employed in a few high-education occupations, such as foreign-language teachers and physicians, but they also make up a large share of employment in many occupations that require little formal schooling: dressmakers, graders and sorters of agricultural products, waitresses, and private household service workers.

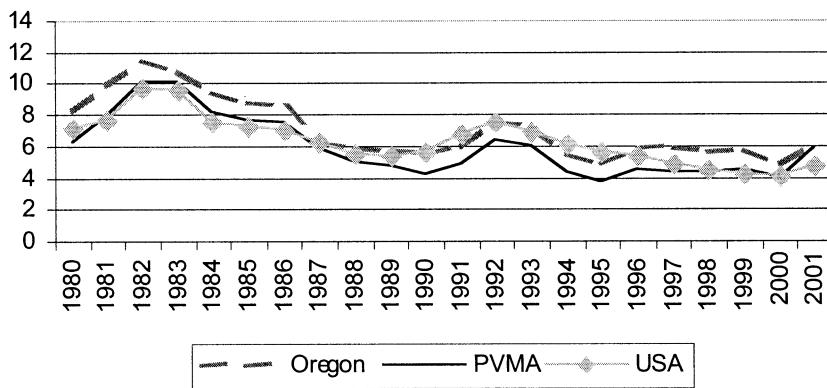
FACTORS AFFECTING METROPOLITAN POPULATION GROWTH

Unemployment rates decreased from their peak of over 10 percent in 1982 and, except for an upswing in 1992-3, remained below 5 percent between 1988 and 2000 (see Figure 6). Improved employment opportunities have attracted in-migrants as well as retarding out-migrants that might have departed the metropolitan areas in search of jobs, if attractive employment had not existed here. (Although not shown in Figure 6, metropolitan unemployment rates have recently increased to 8.4 percent in March 2002.)

There have been shifts in the major economic sectors for employment in the metropolitan area. The most noteworthy changes since 1980 have been (a) increases in the service sector, (b) substantial increases in high-tech, and (c) decreases in lumber-related employment. Overall, more than two-thirds of all current employment in the metropolitan area is in services, trade, and government.

Income in metropolitan Portland area has been increasing since 1982. In 2000 constant dollars, taking inflation into account, average per capita income in the metropolitan Portland area increased from 21,705 dol-

Figure 6. PVMA unemployment rates are below the Oregon rates



Source: State of Oregon, Oregon Employment Department

lars in 1980 to over 24,915 dollars in 1990. Since 1990, per capita increases have been noteworthy: reaching 31,620 dollars in 2000.

FACTORS AFFECTING POPULATION DISTRIBUTION

Population growth has been more rapid in the outlying areas of the metropolitan region than in the central areas. From a demographic perspective, family and individual residential location is influenced by income, age and life cycle status, ethnicity, housing choices, location of employment, and transportation options and preferences. Given the employment decentralization observed in the metropolitan area, population decentralization was certain to occur. The consequences of the other factors are more ambiguous.

Over the 1990 to 2000 period, per capita income increased more rapidly than median household income in the metropolitan area. The difference between the two is attributable to the composition of households. The mix of households in the metropolitan area has changed since 1990 as the number of single-parent, childless-couples, and single-adult households increased. By and large this change amounted to a shift toward household types that traditionally had lower incomes. This shift retarded growth in household median income at the same time that earnings growth, while not as strong as in the 1950s and 1960s, remained robust. As a result, increases in income may have contributed more to decentralization of population than the median income figures would suggest.

Decentralization tendencies created by income change and employment dispersion have been partially offset by an influx of migrants and changing household size. For the metropolitan area as a whole, over three-fourths of the population increase from 1990 to 2000 was attributable to net migration. Most of this migration is made up of people from elsewhere in the United States who are presumably attracted to the metropolitan Portland area by the growing economy and job opportunities, the attractive environment, or both. About one-fourth of metropolitan Portland's migration is attributable to migration from abroad.

Population composition

Fertility and mortality levels and the volume and composition of migration affect the age composition of the metropolitan population. If there were no migration, then the current population would become steadily older because fertility levels are relatively low. In the long run - again, assuming no migration - the median age of the metropolitan population would increase from its current level of about 35 years to about 41 years in 2050. Migration into the metropolitan area has the short-run effect of making the population slightly

younger. In the long run, however, continued immigration will increase the average age of the metropolitan population. This statement may seem counter-intuitive. But migrants eventually become older themselves. A steady stream of in-migrants, even if somewhat younger at the time of migration, will increase the number of people who become older and will, eventually, increase the number and proportion of elderly in the metropolitan area.

AGE COMPOSITION

Figure 7 displays both metropolitan Portland's and Oregon's population pyramid. Compared to Oregon and the United States, metropolitan Portland is slightly younger, reflecting the larger number of young adults who have arrived recently in the area.

The age composition of the metropolitan population is important for a variety of reasons. The number and proportion of people by age affects schools, the labor force, health care, and the demand for recreation, entertainment, and stores. Figures 8 shows current trends in the age structure.

Children under the age of 5, although not yet attending school, determine the future needs of schools. The proportion of the population represented by this age group decreased from 7.6 percent to 7.0 percent despite an increase of 20,000 persons from 1990 to 2000.

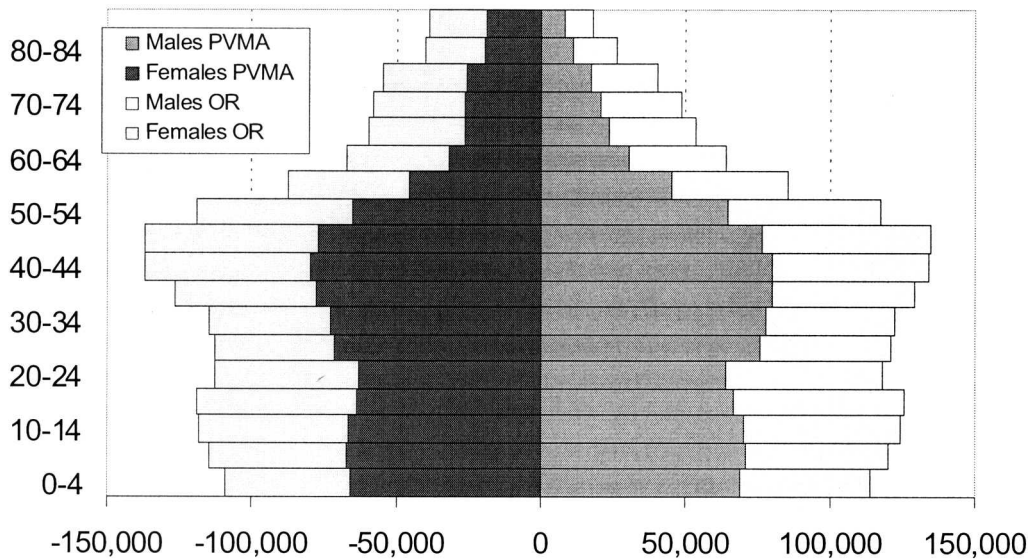
Slightly less than one-fifth of metropolitan residents, or 18 percent, are between the ages of 5 to 17 years. In 2000, there were 354,000 metropolitan residents in these school ages, an increase of 80,000 from 274,000 in 1990. This increase is reflected in the substantial growth of elementary, middle school, and high school students, particularly in school districts with rapid increases in younger couples.

Younger adults in the population, aged 18 to 24 years, are an important population group. They are the primary age group for the college population, for getting married, and for entering the labor force. The young adult population increased from 140,000 in 1990 to 178,000 in 2000, an increase of 38,000.

Despite an increase of 43,000 persons between the ages of 25 and 34, the age group's proportion decreased slightly, almost 2 percent, from 1990 to 2000. This group is very career mobile and is, therefore, affected by employment trends. However, once their young children become school age they are less likely to migrate. The highest rates of net in-migration for the metropolitan area are for ages 20 to 34 years: more than one-half of younger in-migrants to Oregon settled in the metropolitan Portland area in the 1990s.

The working ages of 35 to 64 years are the main age group in the labor force. This age group also includes

Figure 7. The metropolitan area includes a relatively young population, while Oregon's population is just slightly older



Source: U.S. Census Bureau

most parents in the metropolitan area. The population in the working ages grew from 530,000 to 754,000 during 1990 to 2000 and their representative proportion of the total population also grew nearly 4 percent.

The elderly population includes people who have a lower proportion in the labor force and are important users of health services. Although the number of elderly increased by 15,000 from 1990 to 2000, growing from 183,000 to 198,000, their proportion of the total population decreased almost two percent.

Ethnic composition

The metropolitan Portland area population has a less diverse population than other major population areas in the United States or on the West Coast. Metropolitan Portland's minority population constituted 20 percent of the metropolitan population in 2000. For metropolitan areas with population greater than one million, the U.S. average was 36 percent. Moreover, the metropolitan Portland population is considerably less diverse than such other metropolitan areas as Seattle, San Francisco, San Jose, Los Angeles, or San Diego.

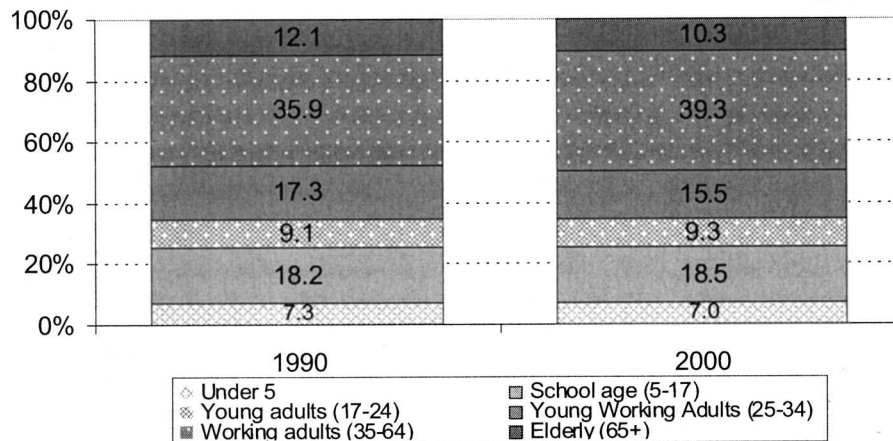
The metropolitan area's ethnic composition, however, has experienced a recent dramatic increase in the minority population. There were gains in the minority population for every county in the metropolitan area

since 1990. The overall minority population - including Asian Americans, Hawaiians and Pacific Islanders, Hispanics, African Americans, American Indians, and persons reporting two or more races - increased from 140,000 in 1990 to 307,000 in 2000, an increase of 119 percent (more than four times the rate of increase for the overall metropolitan increase of 23 percent during the same period).

The sources of the growth of the minority population vary. Almost all the African American and American Indian residents in metropolitan Portland are native-born. Many Asian American and Hispanic residents, however, are foreign-born, although native-born children often accompany them.

Fueled by internal and international migration, as well as fertility levels above the Oregon state average, Hispanics are the fastest growing minority population in the metropolitan area. The Hispanic population increased from 45,000 in 1990 to 115,000 in 2000, an increase of 155 percent during the period. Hispanics are currently the largest of the various minority groups in the Portland metropolitan area.

Asian Americans, including Hawaiians and other Pacific Islanders, have the second fastest rate of growth of minority groups, increasing from 46,000 in 1990 to 81,000 in 2000, an increase of 76 percent. Asian Americans have fertility levels similar to the Oregon

Figure 8. Working adults have slightly increased and the elderly have decreased

Source: U.S. Census Bureau

state average. Metropolitan Portland receives a large number of immigrants from Vietnam, Hong Kong, Taiwan, Korea, Philippines, and Japan as well as Asian Americans who move here from other states. Asian Americans are the second largest minority population in the metropolitan area.

African Americans are the third largest minority population in the metropolitan area, numbering 44,000 in 2000, and increasing 16 percent from 1990. There is a net migration of African Americans into the metropolitan area, but at a considerably lower level than for Hispanics or Asian Americans.

The metropolitan Portland area included 14,000 American Indians and Alaskan Natives in 2000. This is a slight increase from the 1990 population of 12,000. There is modest net migration of American Indians into the metropolitan area, from Oregon and nearby states, but the metropolitan American Indian population remains relatively small.

NEW ETHNIC CATEGORIES

In 1998, the U.S. Office of Management and Budget directed the U.S. Census Bureau and other federal agencies to begin the transition to a revised federal classification scheme for racial and ethnic data. The new scheme affected 2000 census data and will gradually become common for other federal statistical data. There are two major changes in the new scheme. First and foremost, the census, surveys, and federal data collection forms allow respondents to report two or more race or ethnic groups, if they wish. Second, native Hawaiians and other Pacific Islanders report them-

selves separately from Asian Americans.

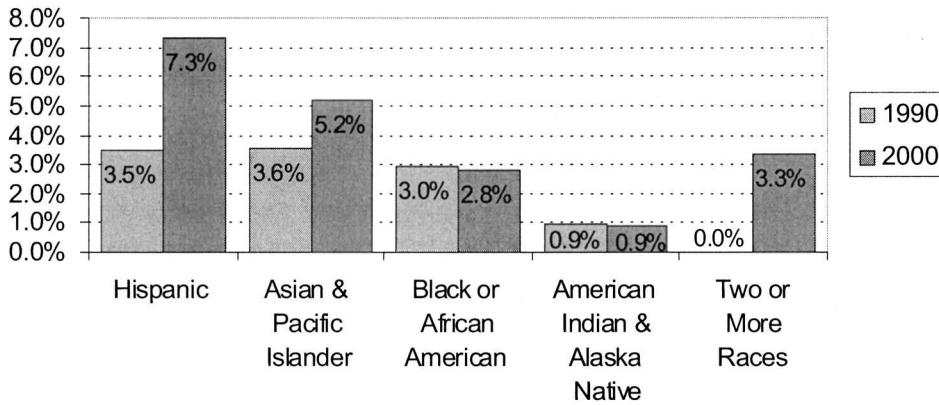
Prior to the 2000 Census, we lacked accurate estimates for the number of Oregonians and metropolitan Oregonians who might report themselves as having multiple racial origins - that is, as identifying with two or more racial/ethnic groups. The majority of residents in Portland and Oregon reported themselves as white (80 percent), in the 2000 census. However, 3.3 percent of the population (53,480 in the metropolitan Portland area) identified themselves as having two or more races in the 2000 census.

Pacific Islanders are a very small population group in Oregon in 2000, numbering only 8,000 of whom 4,500 lived in metropolitan Portland. Although we lack data on net movements from Pacific Island areas, especially Hawaii, American Samoa and Guam, it is likely that migration of Pacific Islanders from Hawaii and other Pacific Island areas added to the metropolitan population in the 1990s. Pacific Islanders are likely to remain, however, the smallest of Oregon's and metropolitan Portland's minority populations for the foreseeable future.

INFLUENCE OF IMMIGRATION

The size of the international migration influx to the United States in the 1990s rivaled the great waves of immigration experienced at the beginning of the century. Taking illegal immigration into account, the best available estimate is that the total inflow amounted to about 1.1 million persons per year, or about 11 million during the 1990's decade. During 2000, California received about 26 percent of these newcomers, and

Figure 9. The proportion of minorities in the Portland Metropolitan Area has been growing



Source: U.S. Census Bureau

another 40 percent went to the other five major immigrant-receiving states of New York, Texas, Florida, New Jersey, and Illinois.

Oregon's share of total U.S. immigration has been relatively modest. Oregon received about 1 percent, or 8,000 to 9,000 persons annually of the total immigrant population arriving during 1990 to 2000. Over 80 percent of immigrants arriving annually in Oregon, or about 6,000 to 7,000, went to the metropolitan Portland area.

While the flow of immigrants into Oregon may not be large, other evidence suggests that many immigrants, especially those from Mexico, originally settled elsewhere before moving to Oregon. As a result, the growth of the foreign-born population includes an unknown number of foreign-born persons who moved to the metropolitan area from other states. At the current time, economic conditions in Mexico and nearby Central American countries continue to produce a steady stream of migrants intent on relocating in the United States. A plausible assumption is that some of the new immigrants to the United States from Latin America may eventually settle in Oregon, even if they initially live in some other state. The large and growing Mexican-origin population in California guarantees a source of future migrants who find Oregon attractive if job opportunities exist.

The social, political, and economic consequences of the inflow of migrants, both native and foreign-born, are substantial. The major social consequence is that an area that has been ethnically homogeneous is becoming less so. While active political participation

for some ethnic groups will take time, general minority participation in city, state, and congressional campaigns increased in the past decade. Economically, the influx of new residents has increased younger minority workers in the metropolitan labor force, adding low and semi-skilled workers as well as managerial and professional workers.

Implications for future growth

Population in the metropolitan Portland-Vancouver area grew from 1.5 million in 1990 to 1.9 million in 2000 and, assuming a continuation of current state and local area conditions and policies, will grow to close to 2.1 million in 2005, and near 2.3 million in 2010. The Portland-Vancouver metropolitan area is expected to increase by 9.3 percent between 2000-2005 and 9.0 percent between 2005-2010, or an annual population growth rate of 1.8 percent for the 2000-2010 period (see Figure 10).

The age composition of the metropolitan population will change as a result of low fertility, increasing life expectancy, and continued net in-migration (see Figure 11). Although all population age groups will increase between 2000 and 2010, the percentage distribution of the population by age will change.

- ◆ A slight increase is initially expected in the proportion of the population less than 18 years of age due to the high number of recent in-migrants in child bearing ages. As this in-migration pattern ceases, the proportion of children less than 18 years of age will decrease reflecting a continuation of existing low fertility levels.

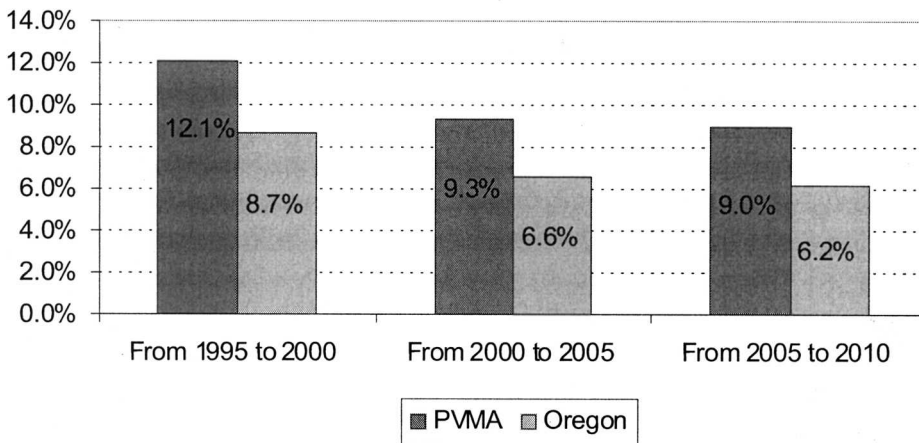
- ◆ The proportion of young adults, aged 18 to 24 years, will decrease slightly.
- ◆ The proportion of the population in the working ages, 25 to 64 years of age, will increase modestly during the next 10 years, reflecting continued immigration of younger persons.
- ◆ The population in Oregon who are currently between 55 and 64 — and who will retire as they reach 65 years of age and older during the next decade — were born from 1935 to 1945, a period of very low fertility during the Great Depression and World War II. Oregon’s population, similar to the U.S. population, will not experience rapid increase in the older population until the larger birth cohorts of the Baby Boomer begin to retire. The first large group of Baby Boom births occurred in 1946 and will become 65 years of age in 2011. After 2010, therefore, there will be sharp increases in Oregon’s older population, steadily increasing the older population in relative and absolute numbers for the following twenty years, from about 2010 to 2030.
- ◆ The proportion of persons 65 years of age and older, had an unexpected increase from 1995 to 2000, but will decrease until about 2005 and then begin to increase as the Baby Boomers reach this age group.

The accuracy of these forecasts depends upon a series of assumptions concerning national, regional, and state trends, especially for the local metropolitan economy. Oregon’s Office of Economic Analysis prepares population forecasts for Oregon and its counties. Metro prepares population and related forecasts for the Portland-Vancouver metropolitan area.

The pace of population growth in the metropolitan Portland area has slackened appreciably in the past several years, following strong economic and population growth throughout most of the 1990s. Although economic recession has resulted in decreased employment opportunities, prospects for future population increases are moderate.

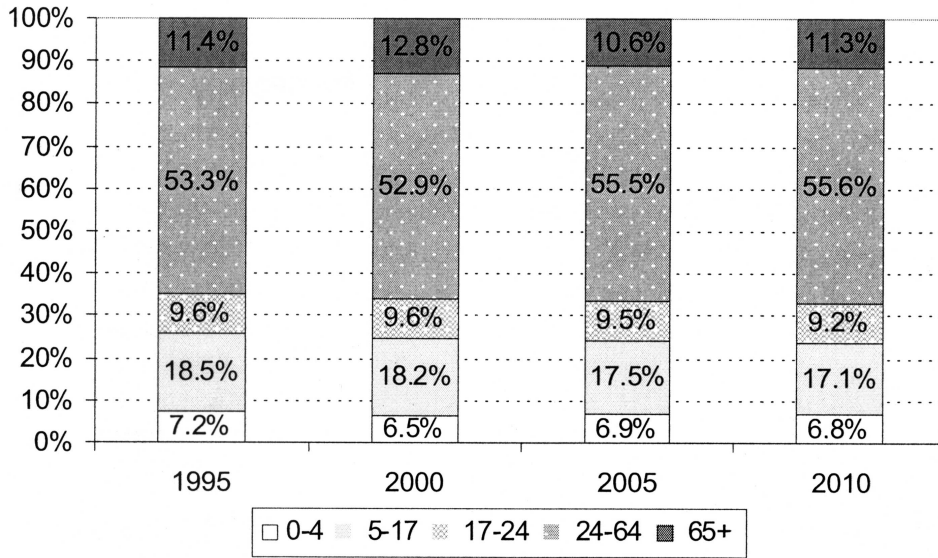
Compared with trends of the previous decade forecasts for population growth in the next ten years, 2000 to 2010, are that moderate growth will occur. In the past, metropolitan Portland-Vancouver has thrived in good times and, except for dramatic shifts in the regional economy in the 1980s, has survived fairly well in bad times. Despite currently high unemployment rates, there is little evidence that the metropolitan area has lost its favored status among West Coast cities for future continued moderate population growth.

Figure 10. The population change is expected to decrease over the next ten years with PVMA growing faster than the rest of the state.



Source: Metro, Portland, Oregon

Figure 11. Oregon's age composition will change slightly by 2010



Source: State of Oregon, Office of Economic Analysis and Metro, Portland, Oregon

Security during a Time of Terrorism

By Gary Perlstein, Professor Emeritus
Administration of Justice, Portland State University

The tragedies of September 11, 2001, changed the way the metropolitan area and the rest of the United States thinks about security. The acts of terrorism caused national policy-makers to call state and local law enforcement agencies to assist in the national defense, and citizens were to be more vigilant and to report all suspicious activities. Unfortunately, the national call came with a confused agenda and no clear directives. There was no standard operating model on September 11, and the role of citizens and law enforcement was unclear. For instance, in New Jersey the state police developed a joint intelligence operation with the federal law enforcement, while in Portland, OR city officials initially ordered local police not to assist the FBI with interviews of Middle Eastern people. One of the main reasons for the confusion is the definition of terrorism itself.

Definitional problems

The main problem in trying to develop a policy about terrorism is that there is no agreement about what terrorism means. Social scientists, government officials, policy makers, and the general public all have engaged in heated debates trying to come to some agreement. Terrorism has a negative connotation. No one wants to be called a terrorist. Terms like insurgent, guerrilla, resister, and freedom fighter are much more acceptable. The main problem revolves around the issue of morality. The term terrorist is often applied to individuals, groups and nations in a way that involves making a moral judgment based on the supposition that some types of violence are justifiable, while others are not.

Even though there is difficulty in getting agreement on a definition of terrorism, there is no shortage of definitions. In his book *Political Terrorism*, Alex Schmidt referred to over one hundred definitions of terrorism that he had collected from surveying various authorities. That book was published in 1983, and I am sure that the number has significantly increased since then. They range from the simple to complex. Brian Jenkins, a noted authority on terrorism has defined terrorism as “the use or threatened use of force designed to bring about political change.” The Federal Bureau of Investigation has developed a more complex one.

Terrorism is the unlawful use of force or violence against persons or property to intimidate or coerce a government, the civilian population, or any segment

thereof, in furtherance of political or social objectives.

But, whether simple or complex, the debates rage on. Almost everyone is against terrorism, but when someone agrees with the cause, then there is a refusal to accept that that a group you support may commit acts of terrorism to advance that cause. It is not terrorism, it is a struggle against an unjust occupation; it is a “war of national liberation.” To many it has become a word game. Fighters in a war of national liberation do not commit terrorist acts. An attack upon civilians, the refusal to accept conventional moral limits, which define military action, is acceptable as long as we agree with the goals of the group that commits the act. A perfect example of the old saying “the ends justify the means.” This may be a fine subject of discussion for a moral philosophy class, but local, national and international strategy requires agreement on what is being dealt with. Unless there is agreement on a definition, extradition of suspected terrorists is difficult, if not impossible and countries that may be supporting terrorist activity cannot be sanctioned by international organizations. The definitional problem may even have been a cause of the 9/11 tragedies. Without a common definition security against terrorist acts may be almost impossible to achieve. In July 2002, a report by the House Permanent Select Committee on Intelligence subcommittee on terrorism and homeland security stated “that the use of different definitions of terrorism by agencies of the U.S. government was a key element in the failure by the United States to stop the September 11 attacks by Al Qaida.”

The nature of terrorism and terrorists: Security concerns

Acts of terrorism are always criminal offenses, but they are not the same as common crimes. Terrorism is a special type of violence. It is a tactic used in peace, conflict, and war. The threat of terrorism is ever present, and an attack is likely to occur when least expected. Combating terrorism requires a continuous state of awareness; it is a necessary practice rather than a type of military operation.

Local law enforcement agencies and most private security firms are organized to apprehend common street criminals. The values and motivations of terrorists and common street criminals differ. Terrorists are well trained, committed to a cause, disciplined and target or attack oriented. Unlike, terrorists who plan their attacks, the common criminals are opportunistic. Terrorists have been known to infiltrate police agencies

in order to thwart law enforcement investigations. The terrorist is a violent “true believer” focused on an objective. Street criminals usually strike the easiest target possible. The terrorist trains, sometimes for years, to achieve their objectives.

This means that the law enforcement and private security officer must receive a new type of training if they are going to be successful in the fight against terrorism. Books like *On Guerrilla Warfare* by Mao Zedong, *Guerrilla Warfare* by Che Guevara, the *Minimanual of the Urban Guerrilla* by Carlos Marighella, the *Turner Diaries* by Andrew MacDonald, and *The Monkey Wrench Gang* by Edward Abbey must be read along with *Patrol Procedures* and *Introduction to Law Enforcement*. They will help to provide an understanding of this new type of criminal. How the terrorist views the world is different from the view of the common street criminal. We are engaged in what has been called a “shadow war.” The enemy is hidden. The battle lines are not clear. If law enforcement personnel are to be part of the war against terrorism, they must become proactive. They require training in information gathering, how to analyze the information, and to develop networks to share the information. Care must also be taken to protect civil liberties.

Civil liberties and security

How much involvement should local police agencies have in homeland security? This is not an easy question to answer. The USA Patriot Act expanded law enforcement’s authority to conduct wiretaps, allows law enforcement to conduct electronic tracking, and increased information sharing between law enforcement and intelligence agencies. Many constitutional scholars are concerned about the danger of proactive law enforcement counterterrorist measures. They fear that law enforcement officers may cross the line from investigating violent activity to intelligence gathering about political action. At the Portland City Council meeting in September, which was held to decide, if the agreement between the Portland Police Bureau and the Joint Terrorism Task Force should be renewed, The American Civil Liberties Union and others testified against the renewal. Their concern was that the FBI has had a long history of violating the constitutional rights of individuals and organizations. Their concerns are justified. The FBI’s counterintelligence program (COINTELPRO) exceeded the authority of law enforcement. It used illegal wiretaps, they opened private citizens’ mail, they burglarized offices of targeted groups, and they disseminated rumors that were used to discredit people. These covert activities were revealed in the 1970s, but there are indications the abuses continued at least into the 80’s. Abuses such as these cannot

continue if law enforcement agencies want to develop effective intelligence systems. There are safeguards and the public must be assured they are in place.

The attacks by Al Qaeda show that more security is required. The six county area has many potential targets that terrorists of all kinds would be interested in destroying. Yes, all kinds. Members of Al Qaeda are not the only terrorists we have to be concerned about. On the international scene, there are groups such as Al Jihad, Gamaa Islmiya and Abu Sayaf. However, we must not forget the threat from “home-grown” terrorists like the Earth and Animal Liberation Fronts. These two groups have always claimed they were not terrorists. However, the late 2002 press release from the Earth Liberation Front makes their true position clear. “segments of this global revolutionary movement are no longer limiting their revolutionary potential by adhering to a flawed, inconsistent “non-violent” ideology”...“where it is necessary, we will no longer hesitate to pick up the gun to implement justice.” In addition there are various radical right-wing groups, and the radical anti-abortion group known as the Army of God. So, the possible targets of terrorism are large. Water supplies, dams, power stations and bridges are just a few of the possible targets. We also must include University laboratories, animal research facilities, mink farms, all timber related businesses, abortion clinics and even McDonald’s restaurants. The need for better intelligence and increased security has never been greater.

The Ark of Sustainability: The Shape of Portland's Sustainability Infrastructure at the Turn of the Century

By Steve Johnson, Ph.D.

Scope of article

There are at least 350 nonprofit and voluntary organizations working on environmental and sustainability issues in the Portland area. Keeping in mind that this number does not include public agencies, private businesses, or schools, the number of organizations is remarkable. What do all these groups do? How did the phenomenal population of groups come about? What can we learn by examining the organizations and their practices about the state of sustainability in the region?

History

In 1960 there were only a handful of environmental organizations in Portland, only a few that still exist today: Audubon Society, Izaak Walton League, the Federation of Outdoor Clubs, Mazamas, and Oregon Wildlife Federation. Some other civic groups worked on environmental issues including the Campfire Girls who planted trees, and the League of Women Voters and Kiwanis Club, both whom sponsored forums about Columbia River policies. The environmental issue that galvanized the broadest civic interest in the 1950s was the creation of Forest Park, spearheaded by a novel consortium of civic groups under the banner of the Forest Park Committee of Fifty. In the public sector the region was just beginning to recognize air pollution—or SMOG as it was referred to, mostly considered a Los Angeles problem—through the formation of the City of Portland Air Quality Advisory Committee. Also, by the mid-1960s the Willamette River was recognized as an environmental problem and the first attempt to clean it up was initiated.

The evolution of Portland's environmental movement can be viewed in three stages: the Earth Day and Small is Beautiful period between about 1968-1975, the steady state period from about 1975 and 1985, the emergence of place based and civic environmental groups, 1985 to 2000, and the sustainability period from the early 1990s to the present.¹

Earth Day and small is beautiful

The first wave of environmental groups coincided with the National environmental policy act in 1969, that requires citizen involvement in environmental impact

assessments, the first Earth Day celebration also in 1969, and in Oregon with the enactment in 1973 of the state land use laws. During this period, roughly from 1968 to 1975 some of Oregon's older first wave environmental groups were created including the Oregon Environmental Council, 1000 Friends of Oregon, the Environmental Defense Center at Lewis and Clark College, Stop Oregon Litter and Vandalism, and OSPIRG.

It was also during this period that one can find the early pioneers of today's sustainability movement. There were several groups that focused attention on neglected issues, such as renewable energy, sustainable agriculture, and recycling or by focusing attention on the multi-issue nature of the environmental issues. One of Portland's first renewable energy groups, Portland Sun, promoted solar energy and energy conservation, while another group, Rain promoted appropriate technology, decentralized self reliance, simple living, and the equivalent of today's green building design. The foundations of the region's organic and sustainable agricultural movement can be traced to the formation of Tilth in 1974. The bibles for these groups were Limits to Growth, Small is Beautiful, and early works of Amory Lovins. Multi-issue perspectives on environmental issues, a main tenet of today's sustainability movement, was not an easy sell in those days to the environmental movement, let alone the general public. Environmental groups tended to think narrowly in terms of environmental protection. Saving wilderness "out there" and not in the city was the main course. The relationship between energy production, green infrastructure in urban areas, organic farming, and healthy bodies was only acted upon by a small set of activists.

The steady state period, 1975-1985

In terms of total number of environmental organizations, the period between 1975 and 1985, was a steady state. In 1972 there were about 30 environmental organizations. By 1985, 16 of those groups had died, while another 20 were born, so that between 1972 and 1985 there was only a net increase of 4 environmental organizations (37). Also, energy had become a central issue of the environmental movement, mostly in the form of the anti-nuclear power activism.

Civic environmentalism and place based groups, 1985—present

The next stage in the environmental movement in Portland began to take shape in the late 1980s and early 1990s. While the mainstream environmental groups continued their work on air and water pollution and preservation of wilderness, smaller groups began to take shape that focused on specific places, “friends of” and watershed groups. Another unique characteristic of this new wave of environmental groups was their consideration of close to home issues: country was brought into the city. Wilderness preservation out there was not the only green infrastructure that gain environmentalists interest. In the Urban Natural Resource Directory published by Audubon Society of Portland in 1995, over 75 friends of and watershed organizations were identified.

Sustainability

At the same time, in the early to mid 1990s, the sustainability movement began to take shape. While the roots of sustainability can be traced back the Earth Day period, the two singular global events that marked the beginning were the Brundtland Report, “Our Common Future,” published by the United Nations in 1987, which bridged environmental and development communities by emphasizing, that “attempts to maintain social and ecological stability through old approaches to development and environmental protection will increase instability. Security must be sought through change...we are unanimous in our conviction that the security, well being, and very survival of the planet depend on changes, now.” One of the outcomes of the meeting was the United Nations Conference on Environment and Development, with two years of preliminary meetings and a culminating international conference, referred to as the Rio conference in June 1992.

The tremendous growth of environmental groups from the late 1980s through the 1990s then can be traced to this global awareness of the interaction between previously separated fields of interest, along with the explosion of small groups working on micro-management of places and watersheds. This, along with a higher rate of stability among existing environmental groups, left Portland at the beginning of the twenty first century with a rich tapestry of environmental and sustainability groups.

Ebb and flow: Birth and death of organizations

When looked at from an ecological point of view, organizations come and go, filling niches, declining as niches are taken over by government functions, or as experiments in social enterprise are failures or the

goals of the activists are achieved or institutionalized. The current state of the sustainability ark reveals this pattern of constant shifting social enterprise. Almost three quarters of the environmental and sustainability groups existent today are less than ten years old, and almost half of those are less than five years old. While this might seem like a fragile institutional state, keep in mind that only 17% of all civic organizations in Portland in existence in 1960 still exist today.

Mainstream environmental groups

The main stream of the environmental movement in Portland is populated by groups that are mostly more than ten years old, have with well established agenda and practices, including 1000 Friends of Oregon, Audubon Society, Sierra Club, Environmental Federation of Oregon, Northwest Environmental Defense Center, OSPIRG, Oregon Natural Resources Council, Oregon Environmental Council, Northwest Environmental Advocates, and Oregon League of Conservation Voters. In total these groups (those with memberships) have about 50,000 members in the state.

In your face

The mainstream environmental groups for the most part are players in the system. The groups use issue campaigns, lobbying and other forms of advocacy, testifying, research and other policy wonk activities, and education to persuade elected officials, administrators and bureaucrats, and the general public to preserve the environment or reach toward sustainable development goals. Some groups, such as Northwest Environmental Advocates, are more likely to be governmental adversaries as partners with government. But to the street side or tree climbing side of the mainstream there are groups that take practice to the radical edge. Many of the environmental groups active in the civil disobedience realm (or beyond) are relatively new, ten years or less; such as the Cascadia Forest Alliance, Critical Mass (anti-auto and pro-bike), Earth Liberation Front, Oregon Wildlife Federation (an old line environmental group more recently transformed toward more radical practices), and college campus groups such as the Blue Heron Earth First (Reed), Students Engaged in Eco-Defense (Lewis and Clark College), and Students for Unity (PSU). The fringe or subversive edge is always shifting. Today’s radical group can sometimes become tomorrow’s establishment. For example, the earliest bicycle movement groups in Portland were outside the establishment, until in the 1970s and 1980s the groups gained recognition through a City of Portland advisory commission, and eventually staffed program in the Department of Transportation. Today’s outside chal-

lenging group, Critical Mass now views established players such as the Bicycle Transportation Alliance as establishment softies.

Environmental education for the next or seventh generation

As with mainstream environmental organizations, mainstream environmental education organizations used to focus their educational efforts on taking students “out there,” into the wilderness that was far beyond the reaches of the city. While that still is the case, environmental education now takes place within urban watersheds and open spaces. For example, in 2002, the Bureau of Environmental Services Clean Water Program in partnership with Portland parks, involved over 1000 students in watershed restoration projects within the city. The Friends of Zenger Farm provides educational opportunity for students to learn about sustainable agriculture and environmental management at a working farm in southeast Portland. Other groups with innovative environmental education programs, include: Cascade Earth Force, Cascadia Wild, Corps Restoring the Urban Environment (CRUE), Oregon Museum of Science and Industry, Student Watershed Project, Wolfree, Inc., Earth Conservation Corps. The Environmental Middle School bases its entire curriculum on environmental education and experiences. The Oregon Green Schools Association assists schools in setting up, maintaining and recognizing effective, permanent waste reduction and resource efficiency programs. 89 schools in the Portland area have been certified as green schools.

Water groups

By count of organizations, water is the most important environmental issue in the Portland region. Almost one quarter of the groups (87 out of 350) have a focus on water issues. There are groups that conserve wetlands (Wetlands Conservancy), build up the treasury of water resources through trust agreements (Oregon Water Trust), and broad scope organizations such as the Pacific Rivers Council, River Network, and Rivers Foundation of the Americas that work on water issues regionally, nationally and internationally. Other groups focus on the critters that swim in the waterways, our totem the salmon, and other brethren fish, including: For the Sake of Salmon, Native Fish Society, Columbia River Inter-tribal Fish Commission, Northwest Steelheaders, Oregon Trout, and the Wild Salmon Center.

Many of the water groups are defenders of specific waterways. Rivers, and creeks, headwaters and sloughs, marshes, and lakes have their caretakers. All of the large rivers (Willamette, Columbia, Clackamas,

Sandy, Mollala) have defenders, and 25 smaller streams.

Friends of places groups

Waterways are not the only places defended and stewarded by citizens in the region. In total there are 84 friends of groups. In addition to waterways these groups defend: trails, ridges, arboretums, woods, mountains, islands, buttes, and farms. Many of the groups have paid staff, but for the most part the groups are small and voluntary. Their charge is to be stewards for specific places on earth. Their impact is limited to small places, but cumulatively they present a united front of citizens concerned about preserving their place on earth. Almost none of the groups existed before 1990.

Multiple issue sustainability groups

The activists at the center stage of sustainability are generalists or systems thinkers. It is not an issue that fuels their activities, but the relationship between the issues. The group that most exemplifies center stage sustainability thinking is Ecotrust, not afraid to cast a systematic look at all angles of sustainability, and promote a conservation economy with its various types of new capital (natural, social, human and bioregional). Sustainable Northwest hosts the premiere sustainability event in Portland (and draws regionally and nationally), its annual Sustainable Northwest Conference, and solutes pioneers and role models through its Founders award. Other groups that look at sustainability from through a multiple lens perspective include the Northwest Earth Institute, the International Sustainable Development Foundation, Oregon Solutions, the Institute for the Northwest, World Stewards (Columbia Gorge bioregion but with deep roots in the Portland area), and the Pacific Green Party that uses sustainable practices as a key part of its party platform.

Thou shalt create partnerships

Moving toward sustainability, a multi-disciple and action perspective on the world elicits partnerships and collaborations. Sustainability groups partner with others as normal course of action. To demonstrate the extend of this phenomena I mapped out the partnerships of 24 notable sustainability and environmental groups (list in Appendix). The 24 groups had 885 partners. The partner organizations spanned the globe, but also demonstrated the Kevin Bacon, or six steps removed character of the movement. The 24 organizations were partnered with 30% (107 of 350) of the environmental and sustainability groups in the Portland region.

Thinking global and acting locally

Many of the environmental and sustainability groups think globally while acting locally, a noble sentiment that may at times seem futile given the immensity of global environmental problems. That has not kept groups from coming up with unique ways to act on global issues. The Cool Portland Campaign, Greenhouse Network, and Climate Trust have all embarked on creative efforts to stem global climate change. For example, the Climate Trust was created in 1997 to act upon state of Oregon legislative (HB 3283) that requires new energy facilities build in the state to avoid, sequester, or displace a portion of their previously unregulated carbon dioxide emissions. The Trust provides a way for gas-fired power plants to meet their state requirements by providing funding to the Trust to fund projects that will mitigate the carbon emission of the plant.

It is also of note that the sustainability and environmental movement in Portland is unusually global in reach for an urban area not classified as a global city. Out of the 350 groups, 57 or 16% of the groups are regional, national or international in scope.

Lifestyle politics, creating choices

An important strategy of the sustainability movement is to create choice for consumers who want to live sustainable lifestyles. The power of choice as a political action is evident by the importance placed on certification processes as mentioned, and financial options such as the Resource Conservation Credit Union, Shore bank, Progressive Investments, Earthshare, organizations that allow people to invest in socially responsible companies or donate to environmental and sustainability causes. There are also groups that focus on supporting people to take actions individually and in small groups that support sustainability goals. The Northwest Earth Institute has become a model for the use of study and action circles for helping people learn about and support each other in choosing lifestyles that bring us closer to a conserver economy. Since 1993, the Institute has facilitated 1,210 courses involving over 12,000 people in the Portland metro area. Other groups focused on lifestyle politics include: Global Action network, Earthday Everyday Oregon, EarthSave, and the Sustainable Living Project (OSU Extension Service). Directories providing options likewise have helped citizens make sustainable choices such as: Chinook book, and Re:direct, and the Portland Greenmap: Resources for Community Sustainability.

The relationship between individual actions (lifestyle politics) and community sustainability is a critical one, and the connection between healthy bod-

ies and healthy communities is increasingly the focus of civic organizations, government and local businesses. Food groups such as Food Matters, Growing Gardens, Oregon Food Bank, and the Chef's Collaborative are all working on the relation between healthy bodies and healthy communities. The largest number of entries in the sustainability business directory Re:direct are devoted to health care services. The Oregon Environmental Council launched a partnership in 1997 to work with health practitioners in the schools to draw attention to the relationship between a healthy environment and healthy citizens.

Knowing home

Knowing home or place and living within the carrying capacity of the place is a central theme to many environmental and sustainability groups. Ecotrust bases its work on the premise and has drawn the most eloquent maps defining our region, the temperate rainforest that reaches from Northern British Columbia to south of San Francisco. The Northwest Earth Institute facilitates the creation of study groups to learn about the local bioregion. The Institute for the Northwest organizes forums on the knowing home or place as part of its on-going lecture series.

Certiably sustainable

The sustainability movement is at a point in its history when certification of sustainable practices is critical. There are at least 15 sustainability certification and awards processes. Tilth certifies organic farms, while the Food Alliance expands the certification process to include a broader range of sustainability goals including quality of life for farm workers. The Certified Forest Products Council monitors and supports the variety of sustainable forest products certification processes. The City of Portland recognizes green and sustainable business practices through its LEEDS building program, its BEST practices awards, and by more informal recognition of green business practices, conserver and recycling practices. The Business Recycling Awards Group, a partnership program of government agencies in the region, recognize businesses for recycling and waste management practices. The Natural Step program is a kind of twelve-step program to help businesses establish sound ecological business practices. The State of Oregon's Oregon Solutions Program and Sustainable Northwest both recognize leaders and exemplars in sustainability through awards and models and cases studies.

In trusts we trust

Trusts are a critical strategy of the environmental and sustainability movement. There are at least 12 land trust organizations ranging from national and state-wide organizations such as the Nature Conservancy, Wetlands Conservancy and the Trust for Public Lands, to more specific place-based trusts such as the Clackamas Community Land Trust, or the Three Rivers Land Trust, that focuses on protecting lands within the Columbia, Willamette and Clackamas watersheds. Other trust organizations have adapted strategies of creating trusts of water (The Oregon Water Trust) and establishment of trusts to combat global warming (The Climate Trust). Some trusts are focused on environmental preservation while others such as the Sabin Land Trust and Portland Land Trust are using the legal framework of a trust to create land banks to retain affordable housing in urban areas. The Energy Trust, a relatively new comer on the block, receives approximately \$45 million annually through a 3 percent purpose change established by Oregon's electric energy restructuring legislation (SB 1149) to work on energy efficiency measures and generation of renewable energy resources.

Art and spirit

There are groups that approach the question of environmental stewardship and sustainability from a spiritual point of view such as Commonway, Earth and Spirit Council, Deardance, Northwest Jewish Environmental Project, and Interfaith Network for Earth Concerns. In a complimentary fashion there are groups that approach it from an artistic framework such as ORLO, Keepers of the Water, and the Waterdancing River Project.

Food and agriculture

Sustainable agriculture in the Northwest has deep roots. The pivotal founding event of the organic or sustainable agriculture movement can be traced back to the 1974 Tilth-sponsored conference that drew over 800 grower and food distributor wannabes to Ellensburg, Washington. In 1980 Tilth produced a guide to sustainable agriculture in the Northwest. As of 2002 Oregon Tilth had certified 220 farms (up from 181 in 1998) as organic.

Community supported farms, or CSAs as they are often called, are relatively new whose roots reach back 30 years to Japan where a group of women concerned about the increase in food imports and the corresponding decrease in the farming population initiated a direct growing and purchasing relationship between their group and local farms. This arrangement, called "teikei" in Japanese, translates to "putting the farmers'

face on food." This concept traveled to Europe and was adapted to the U.S. and given the name "Community Supported Agriculture" at Indian Line Farm, Massachusetts, in 1985. As of January 1999, there are over 1000 CSA farms across the US and Canada. In the typical CSA members purchase a share of the farmer's output for the year and either pick up or have fresh produce delivered weekly. Today in the Portland area there are at least 25 such operations, serving between 15-30 families each. Other hybrids of the CSA model have emerged in recent years. Or-organic Direct, Organics to You, and Urban Organics all deliver organic produce to residences or places of employment.

The other outlet for obtaining food direct from local farmer are farmer's markets. Not a new phenomena, after-all Portland had a large farmer's Market in a building whose foundations are still visible at Waterfront park. But, in the 1990s Farmer's markets took hold again. There are at least 19 farmer's markets in the Portland area, and an association, Oregon Farmer's Market Association that advocates for expansion of farmer's markets throughout the state. Another avenue for the sustainability-minded is to grow their own food at one of more than 30 community garden sites in the Portland region.

There has also been the creation of two collaborative groups, one nonprofit and one governmental, the Food Matters Network, and the Food Council of Multnomah County. One of the central organizing tenants of these groups is the notion of food security, defined as "access by all people at all times to enough food for an active, health life including, at a minimum, nutritionally adequate and safe food that is culturally and socially acceptable."

Protecting farmlands form elimination through urban growth and is the work of the Food Policy Group of the Coalition for a Livable Future, and one of the original and still primary goals of 1000 Friends of Oregon.

The connection between what is grown and what is eaten is the domain of groups like the Chef's Collaborative, the Slow Food movement, and the increasingly successful natural food stores such as New Seasons, Natures, and the few food co-ops remaining from the 1970s (People's, Food Front), and one new one, the Alberta Street Cooperative. One of the critical issues with these groups is not just healthy food, but cuisine that draws upon food grown in the region.

Teaching the next generation about healthy food and the joys of growing one's own food has its advocates in the Friends of Zenger Farm, a sustainable farm and environmental education center in outer Southeast Portland, the Student Alliance of Garden Entrepreneurs (SAGE), and other garden education programs in pub-

lic and private schools such as the Environmental Middle School, and Growing Gardens (for adults and children).

Housing and community development

There are over 30 organizations in the Portland area working on affordable housing and community economic development issues. Many of these groups do not have their roots in the environmental movement but in urban revitalization efforts tracing back to the first community development corporations that emerged in the late 1960s. But, utilizing Eco-Trusts well-rounded definition of sustainability or a conservation economy, the presence of groups working to protect or push for home ownership fits the definition of sustainability. Also, many of the housing groups are taking on green building principles. Several CDCs have been certified for green building practices, and in cooperation with the City of Portland's Office of Sustainability, the now defunct NW Sustainable Communities CDC wrote up green buildings guidelines for CDC housing used by Portland Development Commission, Bureau of Housing and Community Development, and CDCs.

Co-housing started in Denmark in the late 1960s, there call "bofaellesskaber" directly translated as living communities. Co-housing is said to have four characteristics: residents organize and participate in planning and decision process for housing development, that the physical design encourages a strong sense of community; the communities have extensive common facilities; and residents manage the development, making decisions of common concern at community meetings. There are two fully operating co-housing communities in Portland: Trillium and Cascadia, and at any time several groups contemplating or developing co-housing projects.

Green building design and development has rapidly advanced in Portland in the last ten years. In addition to the aforementioned movement among CDCs toward green building practices, the City of Portland, through both the Office of Sustainability (Energy office and Green Building Office), and the Bureau of Environmental Services (green roofs), has furthered green building design through certification, training, and support. Portland also has a chapter of the Northwest Ecobuilding Guild which works with individual builders, and the Oregon Ecobuilding Network. The Rebuilding Center and Environmental Building Supplies companies provide alternatives for the sustainable builder and consumer. The City Repair Project and its several subsidiary operations focuses on rebuilding the community block by block through intersection redesign projects, alternative building con-

structions, and cooperative community initiatives such as the building congress held in southeast Portland last year.

Renewable energy

Some groups that work on renewable energy issues have already been mentioned. One of the more recent innovations with the largest impact in renewables in recent years is again consumer choice. Starting in March of this year Customers in Oregon could choose green options for their electrical needs. PGE reports that 12,588 households—1.9 percent of its residential customers—have chosen one of its renewable options. Pacific Power says 8,467 households—1.7 percent of its residential customers — have agreed to pay a premium for renewable power. Renewable energy production has also gained in recent years. In 2001 The American Wind Energy Association had its largest convention in Portland with 1,500 registrants. Since 1998, new Northwest wind projects have added enough power to the grid to serve 100,000 homes. In April, Danish wind turbine manufacturer Vestas Wind Systems announced plans to build in Portland what will be its largest manufacturing plant. The company expects to hire as many as 1,000 people and said proximity to new Northwest wind projects factored into the decision. Energy Northwest, which operates the only nuclear power plant in the Northwest, also has committed itself to the cause. It unveiled the largest public power solar station in the Northwest last week and is building a wind farm southeast of Kennewick that will serve about 12,000 homes. The Northwest Energy Efficiency Alliance supports regional programs to make affordable, energy-efficient products and services available in the marketplace. The Alliance uses market transformation to remove barriers that prevent energy-efficient products or services from being manufactured and sold as high price, low demand or inadequate availability. The Alliance recently open Better Bricks a resource center for information and services to help architects, developers, builders and facilities managers incorporate energy efficiency into their building designs, construction plans and day-to-day maintenance operations. the Bonneville Environmental Foundation (BEF). The Foundation receives money from the sale of environmentally superior power projects and invests it in additional fish and wildlife mitigation efforts and new renewable resources in the region. BEF has already raised \$1.5 million and has funded a solar PV project as a model project for other public utilities. The Renewable Northwest Project was created in 1994 to promote renewable energy development in the region. RNP was instrumental in passage of the Oregon Restructuring Law which among other

things required investor-owned utilities to offer a renewable product to its customers, and full disclosure about fuel source and environmental emissions on customer bills. The Energy Trust the Energy Trust of Oregon receives approximately \$45 million annually through a 3 percent public purpose charge established by Oregon's electric energy restructuring legislation (SB 1149), to invest in programs to help consumers save 300 average megawatts of electricity by 2012; provide 10% of Oregon's electric energy from renewable energy resources by 2012; extend energy efficiency and on-site renewable energy programs and benefits to underserved consumers; and contribute to the creation of a stable environment in which businesses that promote energy efficiency and renewable energy have the opportunity to succeed and thrive.

Conservers and recyclers

Portland's conserver society advocates can be traced back at least to the early 1970s with the creation of independent recycling operations such as the Portland Recycling Team, Cloudbust, and Sunflower. Many aspects of recycling have been institutionalized by local government or privatized. The Zero Waste Alliance works at achieving conserver goals while maintaining a healthy economic condition. The Rebuilding Center and Environmental Building Supplies have brought new choices for consumers interested in using less, wisely, or reusing. Free Geek focuses recycling efforts on used computers, today's equivalent of the spent refrigerator on back porches. The School and Community Reuse Action Project (SCRAP) provides recycling goods for strapped schools. Trillium Artisans has demonstrated that economic development and recycling can go hand in hand with their outlet for women's crafts from recycled materials.

Transportation

Transportation policy and finding alternative forms of transportation is important to many environmental and sustainability groups. Over the years many mainstream environmental groups such as OEC and 1000 Friends of Oregon and more recently CLF have invested organizing energy on re-arranging the Portland area modes of transportation. The origins of many of Portland's neighborhood associations have their roots in transportation issues. Consumer choice in transportation has come into its own with the creation of Flexcar. Flexcar is a member-based mobility club that gives its members the key to new cars, trucks, and minivans located across a metropolitan region. You pay an hourly rate, and Flexcar pays for the car, insurance and gas. There are more than 8,000 Flexcar members. CarpoolMatchNw is a matching service to help people

find others to share a ride with in Oregon and Southwest Washington, sponsored by the City of Portland Office of Transportation in cooperation with Mid-Valley Rideshare, Tri-Met and C-TRAN.

Professional associations

As the sustainability and environmental movement has matured professional associations have emerged. Some of the associations are regional or state wide such as the Oregon Solar Energy Association, Association of Oregon Recyclers, Association of Oregon Community Development Organizations, Association of Oregon Recyclers, Northwest Ecobuilding Guild, Environmental Education Association of Oregon, and Oregon Ecobuilding Network.

Business practices

There are a number of sustainability groups focused on business practices. The Natural Step entices businesses to follow the Natural Step process established in Sweden to help businesses build economically viable sustainable business practices. Fat Earth provides consulting services for businesses who want to go green. The Oregon Business Alliance holds as one of its central tenants sustainability principles. The Certified Forest Products Council certifies forest product companies as following sustainable practices, allowing builders and consumers the choice to choose environmentally friendly products. The ReDirect Guide to Sustainable Businesses and The Chinook Book both provide directories to sustainability products and services. The Zero Waste Alliance rallies businesses to follow conserver practices.

It is difficult to zoom in on the scope of sustainable practices because of the scope of sustainability definitions. However, a total count of businesses who have been recognized through one certification and award or another provides a loose barometer for the state of things. In total 333 businesses in the Portland area have been recognized, sometimes multiple times, through certification processes (see chart at end of article).

Government's role

The focus of this article has been on the nonprofit and voluntary sector, not government and educational institutions, but a brief summary of their activities is important to rounding out this snapshot of sustainability efforts in the Portland region.

The City of Portland's Office of Sustainability is the benevolent 800 pound guerilla of sustainability, connected through partnerships to many environmental and sustainability groups. Sometimes, as in the case of the City of Portland and Multnomah County, thinking

and acting on sustainability premises means reorganizing administration. The City's Office of Sustainability was at first a commission spearheaded by then Commissioner Mike Lindberg. It has since incorporated several separate functions: energy, recycling, green building design to become its own office, and by way of symbolic statement moved into Portland's best known green building, the Jean Vollum Natural Capital Center.

The Sustainable Development Commission is now a joint City of Portland and Multnomah County commission. One of the key issues the SDC has taken on is to change the procurement policy of city and county to meet sustainability goals. (more). In March the Commission published a joint procurement policy that included several actions, including: supporting and using third-party certifications; supporting and encouraging life cycle assessment and/or analysis, supporting partnerships with other public or private groups, leveraging existing efforts, and assessing procurement in terms of best value for the community in the long term.

Other bureaus within the City of Portland have sustainability goals and actions. The Bureau of Environmental Services (BES). The Ecoroof Program is a cooperative effort of the Bureau of Environmental Services and the Office of Sustainability that promotes ecoroofs by researching technologies and providing technical assistance to the community. The Watershed Revegetation Program is a city wide effort to revegetate streams and wetlands with native vegetation. The program has planted over 1, 500,000 native trees and shrubs, completed 250 restoration projects (about 1000 acres) and developed a native plant seed collection and propagation program. The Clean Rivers Education Program has provided environmental stewardship education to 85% of the K-8 schools in the Portland area. In a partnership with Portland Parks, the program has also involved over 1000 K-12 students in watershed restoration projects. BES also works in partnerships with nonprofit, voluntary, and education programs through its watershed programs to maintain and restore urban streams. BES's work within watersheds is rich in partnerships. As an example, the summits held in the Johnson creek watershed for several years, promoted by Congressman Blumenauer, and facilitated by BES, demonstrated the pluralistic nature of watershed work, developed and attended by 175 civic organizations working in the Johnson Creek Watershed. The Community Watershed Stewardship Program is a partnership between BES, Portland State University, and the Northwest Service Academy. Through a community grants program, the Stewardship Program dispersed a total of \$33,388.69

to groups to carry out stream and wetlands restoration. The total was matched by \$124,048. 1,685 volunteers contributed a total of 7,708 volunteer hours to plant 8,782 native trees and shrubs and to improve 267,180 square feet. A total of \$3,750 was dispersed in the form of \$250 native plant gift certificates from Portland Nursery.

The Portland Development Commission follows the City of Portland's Green building Resolution (no. 35956), that requires all new and major retrofitted City facilities, and all City funded or financed projects, to adhere to certification standards set out in the United States Green Building Council's Leadership in Energy and Environmental Design (LEED) standards. PDC also adheres to an Office of Sustainability documents, "Greening Portland's Affordable Housing" as a standard of incorporating green building techniques into affordable housing projects with PDC involvement.

Metro has several program areas that focus on sustainable development and ecological management. Formed in 2000, the Metro Environmental Action Team (ENACT) meets monthly to coordinate environmental efforts Metro facilities, including resource conservation, recycling and buy recycled products. Representatives from five Metro facilities and seven departments serve on the team. There is an annual budget of \$75,000. ENACT has developed recommendations for an in-house sustainability program for Metro facilities. The proposed guiding vision for the program is that Metro's business practices be sustainable within one generation, by 2025. ENACT has adopted The Natural Step's, ("TNS") four system conditions as a framework for guiding Metro towards sustainability. Metro's Natural Gardening and Composting Program provides training and technical assistance to encourage natural gardening that relies on techniques that build healthy soil, and reduces negative impact on soil and water resources from more intensive chemical processes. Metro's land use planning framework for the region is nationally known as an exemplar of smart growth principles. The Greenspaces Master Plan identifies a cooperative regional system of parts, natural areas, greenways and trails. The Open Spaces Program purchases natural areas, trails and greenways for future use as parts, trails, and fish and wildlife habitat. The Livable Streets Program focuses on developing street systems that are designed to reduce stormwater runoff and impacts of stream crossings. The Regional Transportation Plan -calls for a 350-mile regional trail and greenway system that links natural areas and provides access to nature.

The Port of Portland in 2000 adopted environmental policy that requires the Port to integrate environmental stewardship into all aspects of its strategic plan-

ning and business decision-making; Be a responsible steward of the environment; Strive to prevent pollution of our air, water and landscape; Minimize impacts to and seek opportunities to enhance natural resources; Continually improve our environmental performance and record; Open a dialogue with citizens and leaders of our community; and Comply with all laws and regulations governing our activities. The Port also provides stewardship grants to community organizations to improve the region's quality of life through proactive environmental projects.

Tri-Met follows the tenets of the Natural Step. In 2001, TriMet adopted an Environmental Management System (EMS) for its bus and rail maintenance shops. The EMS is a set of procedures that helps Tri-Met analyze, control and reduce its environmental impact and operate with greater efficiency. TriMet's hybrid diesel-electric buses, currently being tested, are expected to reduce oxide and particulate emissions by 75%.

Many of the cities and towns in the region have also established sustainability goals, at least in part through procurement policies, stormwater management, recycling policies and education programs. Setting the pace for small towns with an eye to the future, in 1995 the Sherwood Sustainability Forum established the Sherwood Sustainable Vision. One of West Linn's city goals speaks to sustainability, "to promote land use policies, both locally and regionally, that are based on the concepts of sustainability, carrying capacity and environmental quality." Similarly, one of Milwaukie's City goals states, "To support community environmental sustainability and livability." The City of Gresham partnered with Metro in adapting a plan for Pleasant Valley that followed many smart growth and green streets principles. The City of Wilsonville, while not having a comprehensive sustainability policy have a number of policies and regulations that would typically be categorized as falling under the umbrella of sustainability, including recycling policies and attempts to incorporate building design standards. A group of interested staff members in Wilsonville have met a few times to identify internal policies and practices that would promote sustainable city operations. Likewise Beaverton is considering adapting a sustainability policy. Hillsboro is building a green city hall, one of the first green buildings in Washington County, and second city halls in the country. The city's initiative started two years ago, when the Hillsboro 2020 Vision Action Plan called upon city government to have three sustainability goals: take the lead with its own new buildings, develop an education program for builders, and consider an incentive program for builders. The City of Vancouver provides education on conservation through its Water Resources Education Center. The Parks

Department is planning to build a LEED-certified community center. The Washington Governor's office has directed the state departments to develop and implement sustainability plans (Executive Order 02-03). (see <http://www.ecy.wa.gov/sustainability/>).

In January, 2001, Like the City of Portland, Multnomah County created a new Department of Community Sustainability (DSCD) by re-organizing separate bureaus and functions. The DSCD's goals include systematic approaches in: Sustainable building and road construction standards; Sustainable building and road maintenance practices; Sustainable fleet vehicles and practices' Regional land use plans and policies, linked to transportation, housing plans and natural resource preservation and enhancement; Regional emergency management plans and policies; Development of tax foreclosed properties in conjunction with regional partners and priorities; Aggressive development of housing opportunities for County clients in need of affordable, supported housing, using the Affordable Housing Preservation trust as one vehicle. Innovative mixed use development projects consistent with neighborhood plans Coordinating strategy on endangered species act issues with regional partners Coordination with the City of Portland in the planning and implementation of urban renewal areas Regional economic development planning, including the regional Investment Board and the Strategic Investment Plan Coordination of animal control services to enhance neighborhood and community livability Developing strategies for compliance with Federal and State environmental laws.

While neither Washington nor Clackamas County have reorganized administrative units to accomplish sustainability goals, the principles of sustainability have factored prominently in recent visioning processes. The Vision West Network in Washington County's environmental issue paper has sustainability and environmental stewardship as one of its guiding principles. In Clackamas County sustainability and environmental stewardship were important elements of the Complete Communities visioning process.²

Conclusion

Since the 1950s the organizational ecology of the environmental sector most parallels the arts sector. From the point of view of the number of organizations in each sector, both sectors were almost nonexistent in the 1950s. There were a few groups, perhaps with noble goals, but nonetheless few in number. They were start-up sectors. Over the period of time if the number of groups that are born, die, or endure are compared, those in the arts and environmental sector are comparable: large numbers of births and deaths, with a stable

but small number of groups that endure throughout the period. This can be compared with the business sector, which reveals a much more stable profile in general: a nearly equal number of births and deaths and large number of enduring organizations.

However, the environmental sector also has an unusual phenomena. In the late 1980s and early 1990s it exploded with the foundation of small place-based “friends” of groups. By pure number of organizations the only comparable analogy is the growth of neighborhood associations in the 1970s and early 1980s. The explosion of small groups does not equate directly to more people turning to environmentalism, so much as it does point to a different way of framing environmental problems. These kind of groups may endure for quite awhile because unlike larger organizations with more complicated resource mobilization quandaries, they can persist in various stages of activity and dormancy.

What is unique about the current stage of emphasis on the sustainability framework is that the issue of sustainability has spawned many new organizations, a much higher proportion with larger resource mobilization needs. Therefore, it is likely that over the next few years the total number will decline as the ecological niche is filled. As with the Community Development Corporation movement in Portland, that likewise filled, and then over-filled the niche, sustainability groups may either perish, or consolidate through collaborations and partnerships.

NOTES

1. Historical data on environmental and sustainability groups derived from the author's Ph.D. dissertation: *The Transformation of Civic Institutions and Practices in Portland, Oregon, 1960-1999* (Portland State University, 2002). Data on current sustainability and environmental groups was compiled through survey, interviews, Internet and newspaper searching, with assistance from Audubon Society of Portland, Office of Sustainable Development, and EcoTrust.

2. Schools and universities have also made substantial gains in sustainability and environment programs both internally in terms of sustainable practices, recycling, procurement and building design, as well as in curriculum reforms. Portland State University hired the first sustainability coordinator in the Oregon University System. The coordinator works on sustainable practice efforts in conjunction with the University's Sustainable Practices Advisory Committee. PSU has also assigned a faculty member to lead a faculty effort to integrate sustainability throughout our curriculum and research. The University also is a Natural Step member and promotes sustainability efforts through lecture series such as the Millennium Series and Civic breakfast forums.

Green Businesses in the Region

The following list of green businesses provides a snapshot, not a comprehensive directory, to green businesses in the region. The list is derived from a variety of certification processes, awards, and directory listings. The list includes businesses, government agencies, schools, and nonprofit organizations.

Certifications, Awards, Directories used to compile the list

BEST—City of Portland’s Businesses for an Environmentally Sustainable Tomorrow award
CC—Chef’s Collaborative members
CFP—Certified Forest Product, Certified Forest Products Council

EA—PGE Earth Advantage program
EBA—ecobiz auto award
Eco-roof—Eco-roof Projects, City of Portland
GLA—Governor’s Livability Award
Greenmap—listed on Greenmap of Portland
ISF—International Sustainable Foundation partners
LEEDS—Leadership in Energy and Environmental Design Green building rating system
NS—Natural Step members
NWEG—Northwest Ecobuilding Guild members
OBA—Oregon Business Association Member
ORED—Oregon Renewable Energy Directory
SNF—Sustainable Northwest Founders award

2000 Market AssociatesBEST

A

Action Automotive Inc.EBA
 Adidas VillageEA
 Albedo Consulting.....NWEG
 Alberta 2161LEEDS
 Alberta Body and Paint.....EBA
 Alberta Cooperative Grocerygreenmap
 Albertson’sBEST
 All Around Automotive, Inc.EBA
 American Honda Motor co.BEST, LEEDS
 American International Forest Products Inc.CFP
 American Lung Association.....EA
 Ankrom Moisan ArchitectsNS
 Architectural Building ServicesCFP
 Arciform LLCBEST
 Ash Grove cementBEST
 Ashforth pacificBEST, NS
 Associated Auto Body & PaintEBA
 Association of Oregon Recyclers.....ISF

B

Bank of America FoundationNS
 Bank of America.....ISF, BEST
 Barry Menashe Inc. RealtorsGLA
 Baugh ConstructionNS
 Bear Creek CorporationOBA
 Beebe Family TrustsCFP
 Bella Vista HomesEA
 Belmont Dairy.....BEST
 Bernard’s GarageEBA
 Bi-O-KleenEA
 Blazer Development Inc.EA
 Blue Cross Shield of OregonBEST
 BluehourCC
 Boden Store Fixtures Inc.CFP

BoeingBEST
 Bonneville Power Administration.....ISF
 BOORA ArchitectsNS, BEST
 Brewery Blocks, Riggs and CompanyLEEDS
 Browning-Shono ArchitectsNWEG
 Buckeye Pacific CorporationCFP
 Buckman HeightsBEST
 Buckman Terrace Green RoofEco roof
 Bugatti’s RistoranteCC
 Builders CenterGreenMap
 Bullivant Houser BaileyOBA

C

Cafe AzulCC
 Cafe Mingo.....CC
 Caffall Bros. Forest ProductsCFP
 Calbag Metals Co.BEST
 Carleton Hart ArchitectureNS
 Carr ChevyEBA
 Carriage House Construction CompanyNWEG
 CarsharingSNF, BEST
 Cascade Empire CorporationCFP
 Cascade General Inc.BEST
 Castlerock Homes Inc.EA
 Cavanaugh and Cavanaugh, Ode to Roses building.....LEEDS
 CBWTP Operations Center.....LEEDS
 Cecil Smith ConstructionNWEG
 Celilo Group, Inc.OBA
 Center for Watershed and Community HealthISF
 Century West EngineeringISF
 Certified Foret Products CouncilSNF
 CH2M Hill, Inc.....OBA, SF
 Chefs CollaborativeSNF
 Chown hardwareBEST
 City of HillsboroISF
 City of Portland Bureau of Environmental

QualityISF
 City of Portland Bureau of PlanningISF
 City of Portland Office of International
 Relations.....ISF
 City of Portland Office of Sustainable
 Development.....IS, NWEG
 City of PortlandNS
 City of Portland, City HallEA
 City of Portland, Columbia Blvd. Wastewater
 Treatment PlantLEEDS
 City of Portland, Communications CenterLEEDS
 Clackamas Community Land TrustEA
 Clackamas High SchoolGB
 CMC PropertiesEA
 CNF Information Technology CenterEA, BEST
 Cogan Owens CoganISF
 Coho Construction Services, Inc.NWEG, EA
 College Housing NorthwestNS
 Columbia Computer Maintenance IncORED
 Columbia Forest ProductsCFP
 Columbia Steel Casting Co.BEST
 Connie S. JohnsonNWEG
 Consolidaed Metco.....BEST
 Construction Ed. 101NWEG
 Conteinental BrassnCrown Cork and SealBEST
 Covenant Homes LLC.....EA
 Cynthia L. Bankey Architect, Inc.NWEG

D

Davenport Graphic Design Remodel
 and additionGB
 David Douglas High School.....REG
 Davis Wright Tremaine.....BEST
 Deja ShoeOS
 Dennis Myers Design BuildEA
 Di Benedetto/Thomson ArchitectsNWEG
 Dorothy A. Payton/AtelierNWEG
 Double D Development, Inc.....EA
 Dupont Flooring SystemsNS

E

Eagle Energy Systems, LLCEA
 Ecosystems.....ORED
 EcoTours of Oregongreenmap
 EcotrustISF, LEEDS, CC, BEST
 Ecumenical Ministries of OregonREG
 Edge Lofts.....LEEDS
 Efficiency AllianceNS
 Elf Atochem North AmericaBEST
 EMS Manufacturing, Inc.....CFP
 Endura Wood ProductsEA, CFP, NWEG
 Environmental Building SuppliesEA
 Epson Portland Inc.BEST, ZW
 Esquire Motors Inc.EBA

F

FatEarth, Inc.NWEG
 Fernhill Wetlands CenterLEEDS
 Fish Construction NW Inc.EA
 Fletcher Farr AyotteNS
 Food Front Co-opgreenmap
 Franz BakeryBEST
 Fred Meyer Stores.....OBA, BEST

G

GBD Architects, Inc.NS
 Gen-Con, Inc.....ORED
 Genoa ResturantCC
 Gerding/Edlen Development Co.NS
 GLC Properties, Inc.EA
 Grand Central Bakery and CafeCC
 Graphic Sciences Inc.BEST
 Greensleeves, Inc.NWEG
 GreenWorks, P.C.NWEG
 Gregory Acker, Architect.....NWEG

H

Habitat for HumanityGB
 Hampton Affiliates, Inc.CFP
 Hanna Andersson CorporationOBA
 Hannam Homes LLC.....EA
 Hardwood Industries Inc.....CFP
 Harold Long, ArchitectNWEG
 Hawthorne Auto Clinic Inc.....EBA
 Hayco LLCCFP
 Healthy Home BuilderEA
 Henningsen Cold StorageBEST
 Hercules IncorporatedBEST
 Hewlett Packard.....NS
 Higgins Resturant.....CC
 Hillsboro City HallLEEDS
 Hippo Hareware and TradingGreenMap
 Holt & Haugh, IncGLA
 HOST DevelopmentEA
 Hot Lips PizzaSNF, CC, BEST
 Housing Authority—Hamilton WestEco-roof
 Housing Development CenterNWEG

I

Icyene Inc.....EA
 Individual Tree Selection Management Inc.CFP
 Indowood Forest Products, Inc.CFP
 Infocus CorpBEST
 Innerspace Office Solutions.....NS
 INNOvative Industrial SystemsORED
 Integrated Urban Habitats.....GreenMap
 Intell oregonBEST

J

Jacobs Heating and Air ConditioningEA
 Johnson Creek CommonsGreenmap
 JoineryCFP

K

Kadel’s Velvet HammerEBA
 Katharine Kremer DesignNWEG
 King Solar ServicesORED
 KLC InternationalCFP
 KPFF Consulting EngineersNS

L

Lamb’s ThirftwayBEST
 Land Rover PortlandEBA
 Lando and Associates, Landscape ArchitectureNWEG
 Landscape and Ecological Design Consulting NWEG
 Larry Bennett Handyman RemodelingORED
 Legacy HospitalsBEST
 Lents Body ShopEBA
 Les Schwab Tire Centers, Inc.OBA
 Lewis and Clark College Social Sciences Building
LEEDS
 Liberty Northwest CorporationOBA
 Lifetime Energy LLC.....ORED
 Loaves and FishesLEEDS
 Louisiana PacificOBA
 LSW Architects, PCNS
 Lukas Auto Painting & RepairEBA
 Lumber Products.....CFP
 LWO corporation/Arboria and Woodway.....CFP

M

Mahlum Architects.....NS
 Marco’s Cafe and Espresso BarBEST
 Marquam Hill Transportation partnershipBEST
 Masterpiece Wood FloorsNWEG
 Melvin Mark CompaniesNS
 Mentor Graphics CorporationBEST
 Merix CorporationBEST
 Metro R.E.M. Solid WasteNWEG
 MetroNS, ISF
 Mickey Finn’s Brew PubBEST
 Micro Power ElectronicsORED
 Mill End StoreBEST
 Mitch G. Gilbert/Architect.....NWEG
 MithunNS
 Mother’s Bistro and Bar.....CC
 Moving Boxes Inc.BEST
 Mt. Hood MeadowsNS
 Mt. Richmond ForestCFP
 Mt. Scott Family DentalBEST
 Multnomah CountyNS

N

Nature’s Wild Oatsgreenmap
 Neighborhood RecyclingSNF
 Neil Kelly Co.....NS, OBA, CFP, BEST
 New Seasonsgreenmap
 NIKE Inc.NS, OBA, EA, BEST
 Norm ThompsonNS, OBA, EA, BEST
 North American Wood Products, Inc.CFP
 North Pacific Group, Industrial Lumber Division CFP
 Northwest Earth InstituteNS
 Northwest EnergyNS
 Northwest Natural GasOBA, ISF
 Northwest Pine Sales, Inc.CFP
 Northwest Wood Specialities, Inc.....CFP

O

OKI Semiconductor.....BEST
 OMSI Parking Lot Bioswales.....greenmap
 One Waterfront Place, 1021 Building LLCLEEDS
 Oregon Arena CorporationBEST
 Oregon Business AssociationISF
 Oregon Department of AgricultureISF
 Oregon Department of Environmental QualityISFNS
 Oregon Department of Land Conservation and
 DevelopmentISF
 Oregon Economic and Community Development
 DepartmentISF
 Oregon NS Network.....SNF
 Oregon Office of Energy.....ISF
 Oregon Office of the GovernorISF
 Oregon Soil CorporationBEST
 Oregon Steel MillsBEST
 Oregon Water TrustSNF
 Oregon-Canadian Forest ProductsCFP
 OrePac Building Products, Inc.....CFP

P

Pac TrustGLA
 PacificCorpOBA, NS
 Pacific Development/Port of Portland
 BuildingBEST
 PAE Consulting EngineersNS
 Paley’s PlaceCC
 PDX AutomotiveEBA
 PED Manufacturing, Ltd.BEST
 Pendleton Woolen MillsNS
 Peninsula Community Development Corp.EA
 People’s Food Co-opgreenmap
 Peter’s Auto WorksEBA
 PGE Green Building ServicesNWEG
 Plywood Tropics USA, Inc.CFP
 Portfolio 21SNF
 Portland Art MuseumBEST
 Portland City Life ProjectGLA
 Portland Development CommissionISF

Portland General ElectricOBA, SF, NWEГ, BEST
 Portland State UniversityNS, SF, LEEDS
 Powell’s Books, Inc.OBA
 Precision Lumber Co.CFP
 Progressive Investment ManagementNS, BEST
 ProSteel Builders LLCEA
 Providence St. Vincent Medical CenterBEST
 PTR Homes LLC.....EA

R

R&R Energy ResourcesEA
 Rainbow Valley Design and ConstructionEA
 Re:Source OregonNS
 Rebuilding CenterNWEГ, BEST
 Red Lion Inns/Central LaundryBEST
 Red Star Tavern and Roast House.....CC
 Rejuvenation Inc.NS, OBA
 Renewable Electricity Solutions.....ORED
 Rifer Environmental.....ISF
 Riverside Golf and Country Club.....BEST
 Riverside Homes.....EA
 Russell Development Company, Inc.OBA

S

Schwabe, Williamson and WyattISF
 Seabold Consturction CompanyEA
 SERA ArchitectsNS, SF
 Shamrock Building Materials Inc.CFP
 Shiels Obletz JohnsonGLA
 ShoreBank PacificNS, SNF
 Sockeye Development LLCEA
 Soderstrom ArchitectsNS
 Sokol Blosser WineryLEEDS
 Solar Interior Design.....ORED
 solar783 design studio.....ORED, NWEГ
 Solardyne CorporationORED
 Solarwaterpump.comORED
 South Park Seafood Grill and Wine BarCC
 Springwings Interior DesignNWEГ
 SRG PartnershipNS
 Standard InsuranceOBA
 Stephen D. Wilson Inc.EA
 Stoel Rives LLP.....OBA
 Stonebridge Custom HomesEA
 Stormwaer Management Inc.BEST
 Sustainable NorthwestISF
 Sylvan Development Inc.EA

T

Tapeo Cocina de EspanaCC
 Team Oregon, LLCISF
 Tektronix Inc.BEST
 Terrafima Building Inc.EA, NWEГ
 The Climate Trust.....ISF
 The Collins Companies.....NS, CFP

The Esplanade at RiverPlaceCC
 The Import GarageEBA
 The Oregon Progress BoardISF
 Think ... Erez Russo, ArchitectNWEГ
 Thompson Vaivoda & Associates.....NS
 Tigard LibraryLEEDS
 Timber-Tek UV FinishesGreenMap
 Tonkon Torp LLPOBA
 Tri-MetNS, ISF
 Tualatin Valley Water District OperationsLEEDS
 TVG Inc.EBA
 Twenty Four Seven IncorporatedCFP

U

U.S. Trading CompanyCFP
 University of PortlandNS, BEST
 URS CorporationNS
 US BancorpsBEST

V

Veritable QuandryCC
 Viridian Place, RTJ PartnershipLEEDS
 Vision for Home Projectgreenmap

W

Wacker Siltronic Corp.BEST
 Walsh ConstructionEA
 Washington Park Zoo.....BEST
 Wells FargoOBA
 Western International Forests ProductsCFP
 Westran PowerORED
 Whittaker Ponds Education CenterEco-roof
 Wieden and KenndyBEST
 Wildwood ResturantCC
 Wilken & Wilken Builders, LLCNWEГ
 Willamette Industries, Inc.ISF
 William A. ColbyEA
 Winkler Development Corp.EA
 Woodstock LibraryEA

Y

Yost Grube Hall ArchitectureNS

Z

Zimmer-Gunsul-Frasca PartnershipNS

Institute of Portland Metropolitan Studies Mission Statement

DECEMBER 4, 2002

The mission of the Institute of Portland Metropolitan Studies is to serve the communities of the Portland-Vancouver metropolitan area and to further the urban mission of Portland State University by:

- ◆ Identifying the most pressing issues facing this metropolitan area and its communities, and developing the data and other information needed to fully communicate their scope and significance;
- ◆ Building capacity in the region to address critical metropolitan issues by:
 - ◆ brokering partnerships among faculty, students, and area communities to foster new understanding of and/or new strategies for addressing those issues; and
 - ◆ acting as a catalyst to bring elected officials, civic and business leaders together in a neutral and independent forum to discuss critical metropolitan issues and options for addressing them; and
- ◆ Developing new resources to support research and service activities needed to meet these objectives.

By acting effectively on this mission statement, the Institute will enable the:

- ◆ University to help advance the economic, environmental, and social goals held by the communities of this region; and
- ◆ Communities of this region to act collectively to seek and secure a sustainable future for this metropolitan area.

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Metropolitan Studies
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MARCH 2003

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