



Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians

Comprehensive Economic Development Strategy

May 2022





Acknowledgments

CTCLUSI Tribal Council

Strategy Committee

Assistant Planner

Blue Stone Strategy Partners





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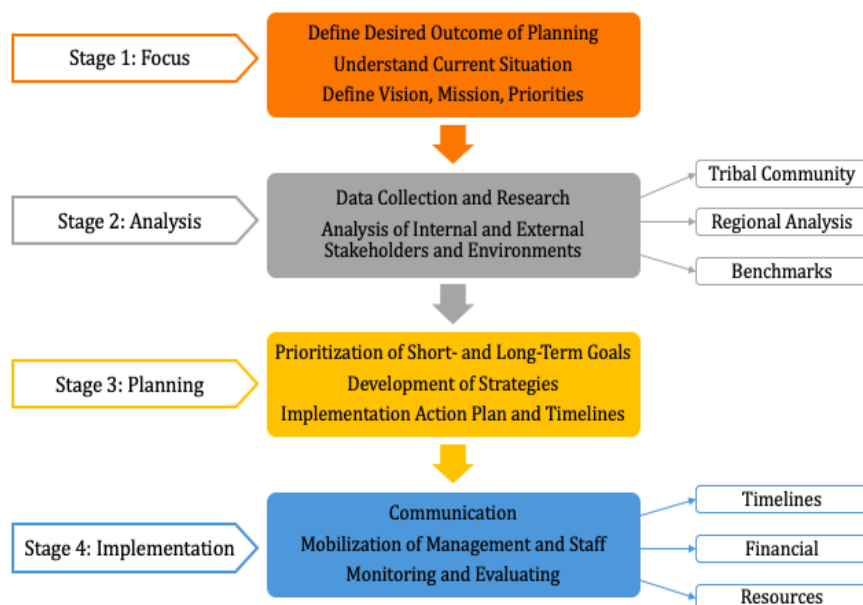
Executive Summary

CEDS Expectations

The Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians (CTCLUSI), with the support of Blue Stone Strategy Partners (Blue Stone), has developed this Tribal Comprehensive Economic Development Strategy (CEDS) report to create an implementable and manageable plan that allows CTCLUSI to focus on building a strong economic development foundation for seven generations forward. In previous years, plans presented to the Tribes have been perceived as overly complicated, unattainable, and often required resources beyond the realistic means of CTCLUSI. Through the planning process, Tribal economic priorities have been identified, with initial implementation focused on conservative opportunities that are feasible and sustainable to support movement forward.

It is important that the CEDS re-evaluated CTCLUSI economic resiliency and diversification opportunities in stabilizing the community and normalizing movement forward from the impacts of COVID-19/the pandemic to develop a clear economic vision and strategy for strengthening the Tribes' economy.

CEDS Process



To initiate the planning process, Blue Stone visited CTCLUSI to tour the land and conduct in-person interviews with key stakeholders, Tribal Council members, and staff to identify strengths and opportunities for the Tribes, obtain a better understanding of the types of economic



development challenges that the Tribe has encountered in the past, and begin to develop a strategy for CEDS implementation that aligns with the Tribes' expectations.

In addition to the comprehensive site visit, a Market Analysis was conducted and included within this report to gain a greater familiarity with the local and regional economic opportunities. As community engagement is critical to success, an electronic survey was facilitated to gain the communities' input on economic needs and desires.

Priorities/Conclusion

Through the economic planning process, four main priorities have been identified:

Strong Economic Governance Structure

- Revitalize Blue Earth Federal Corporation as the primary economic development entity

Maximize Growth Opportunities

- Grow current opportunities through strategic investment

Economic Diversification

- Capitalize on opportunities for CTCLUSI to diversify its economy and become more resilient against shocks to the current system

Tribal Member Opportunities

- Support Tribal members staying or returning home, provide employment and entrepreneurship opportunities to Tribal members on Tribal lands

These priorities are aimed at increasing economic activity for CTCLUSI, providing greater opportunities for Tribal members, and capitalizing on CTCLUSI's unique assets and competitive advantages. Priorities were developed directly from information gathered through the SWOT process, in-person interviews and discussions, Tribal member survey results, and Market Analysis. Through this process the priorities identified and discussed in this plan are transparent.

Each priority includes a discussion section providing deeper insights into the priority along with goals, objectives, and performance measures. Action items and proposed projects are also directly related to and reference priorities.



Below outlines goals aligned with each priority:

Priority 1: Revitalize Blue Earth Federal Corporation as the Primary Economic Development Entity

Goals:

1. Establish Blue Earth Federal Corporation as the Tribes' primary economic development entity.
2. Maximize Blue Earth Services and Technology 8(a) opportunities.

Priority 2: Grow Current Opportunities

Goals:

1. Begin harvesting and selling timber from the Tribal Forest.
2. Generate additional revenue from healthcare services.
3. Rework golf course to better align recreational and entertainment offerings.
4. Create a real estate investment portfolio of properties and land within and adjacent to Tribal boundaries.
5. Further capitalize on tourism.

Priority 3: Economic Diversification

Goals:

1. C-Store plan and development.
2. Pediatric Dentistry Center.
3. Digital Nomad Resource Centers.

Priority 4: Support Tribal Members Staying or Returning Home

Goals:

1. Grow and expand local businesses.
2. Training for virtual/remote positions.
3. Support entrepreneurship.
4. Provide Tribal members with job-specific training to fill vacancies in identified sectors.



Summary Background

Tribal History

The Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians are made up of three Tribes (four Bands): two bands of Coos Tribes: Hanis Coos (Coos Proper) and Miluk Coos; Lower Umpqua Tribe; and Siuslaw Tribe. Although historically both Coos bands lived in close proximity to one another on the Coos River tributaries, they spoke different dialects of the Coos language and had their own unique history and cultural differences.

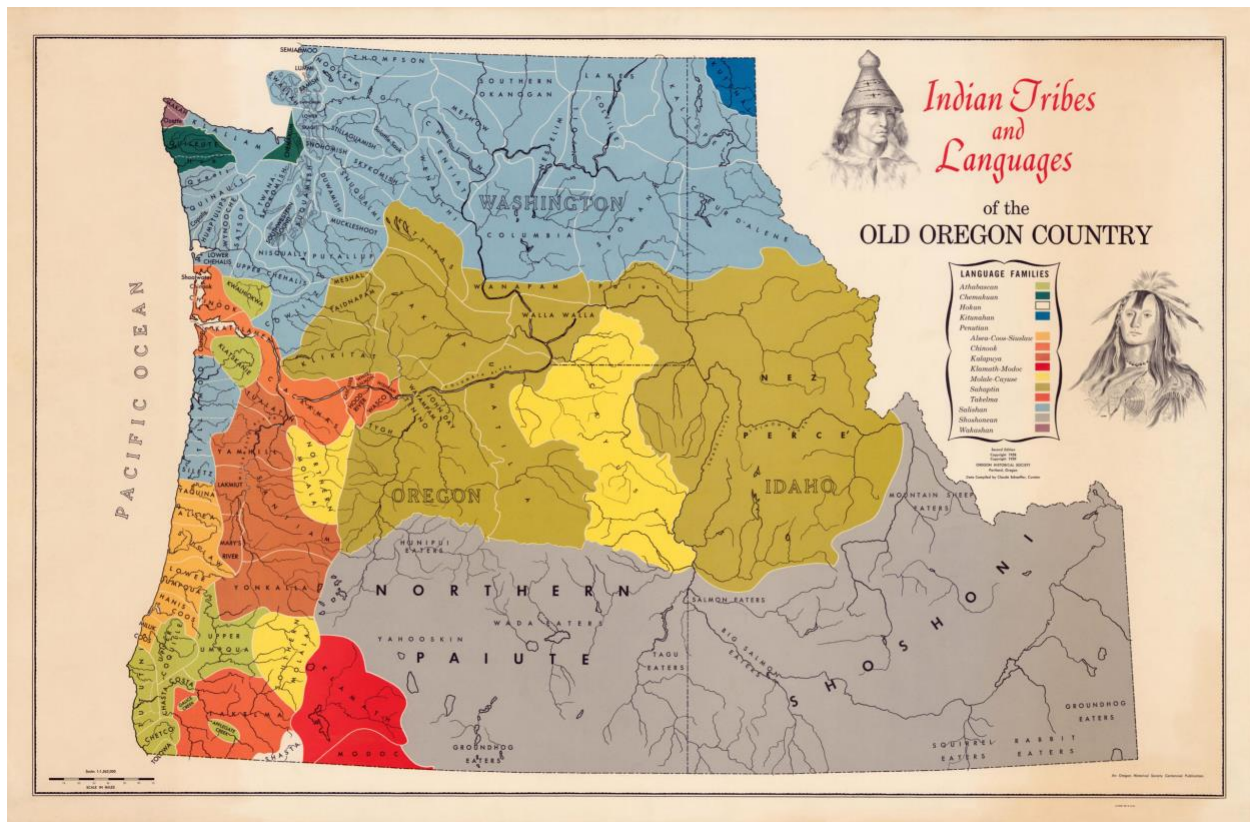


Historic homelands extended from the richly forested slopes of the Coastal Range in the East to the rocky shoreline of the Pacific Ocean in the West, a vast region of some 1.6 million acres. Living peacefully in an area characterized by moderate temperatures and abundant natural resources, including fish, shellfish, wildlife, and a rich variety of edible plants. The Coos cosmology states that:

Two young men from the Sky World looked down below, and saw only water. Blue clay they laid down for land, and tule mats and baskets they laid down to stop the waves from running over the land. Eagle feathers they planted, and they became trees. As they were thinking, it was happening. All kinds of vegetation grew; animals came. The world became beautiful. The world became as it is now.

People of the Confederated Tribes lived in villages of cedar plank houses on the margins of the extensive estuaries of the Siuslaw, Umpqua, and Coos rivers; an area of rugged cliffs and open beaches, bordered by shifting sand dunes and steep, heavily vegetated mountainsides. Their villages tended to be autonomous to each other.

All three Tribes lived in cedar longhouses. Men hunted and fished; while women collected berries, roots and nuts. In addition, their rich diet consisted of seafood, game, sea bird eggs, and other delicacies. Deer and elk skins were fashioned into garments and blankets. Baskets were woven using a variety of materials, from conifers to grasses. Nearly everything was treated as having a spirit, and spirits could exert a positive influence on people's lives.



In 1916, the Tribes established a formal, elected tribal government that they have maintained ever since. Then, in 1941, the Bureau of Indian Affairs (BIA) took a small privately donated parcel (6.12 acres) into trust for the Confederated Tribes in the city of Coos Bay. On this small “reservation” the BIA also erected a Tribal Hall that included an assembly hall, kitchen, offices and medical clinic. It is still in use today and is on the Register of Historic Places

However, without their knowledge or consent, they were included in the Western Oregon Termination Act of 1954. In 1948, the Coos and Lower Umpquas sent forty-eight delegates to the Siletz Reservation to express their disapproval of termination, but were not allowed to make their case, as they had been locked out of the meeting and were told the termination bill “did not affect them”. Even though the U.S. government officially terminated them, the Confederated Tribes never sold their small reservation and Tribal Hall, and, instead, maintained it. During the Termination Years (1954 to 1984), the Confederated Tribes attempted to provide services to its members with the few resources that they had. They also continued to fight for restoration and recognition as a sovereign nation.



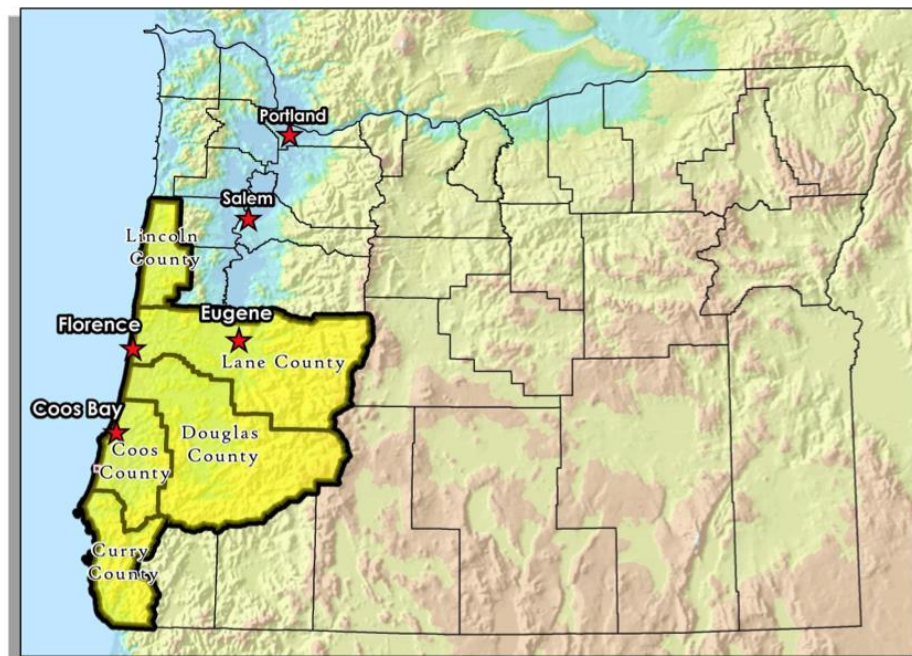
Finally, after thirty years of a moral, legal, and legislative battle, President Ronald Reagan restored the Tribes to federal recognition by signing Public Law 98-481 on October 17, 1984. The Tribes' sovereignty was once again recognized and funding for education, housing and health programs was restored. In 1987, the Tribe approved a constitution and began to lay the groundwork for a self-sufficiency plan.

Since this historic event, there has been a period of rapid growth, along with the expected political and administrative pains new governments typically encounter. This internal turmoil has created impediments to progress in achieving self-sufficiency and cultural restoration. In spite of these obstacles, the Tribes have been continually building on the basic framework established by the Restoration Act.

Today, CTCLUSI strives to perpetuate the Tribes' unique identity as Indians and as members of the Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians, and to promote and protect that identity. It is CTCLUSI's goal to preserve and promote its cultural, religious, and historical beliefs while continuing to learn and grow as a part of the community lived in. The Tribes' also work to promote the social and economic welfare of its members both inside and outside of its five-county service area in Oregon. CTCLUSI is a part of many communities within this region, including Coos Bay, North Bend, Reedsport, Florence, Eugene, and Springfield.

The CEDS focus area covers the southwest coastal region of Oregon, or CTCLUSI five-county service area with a focus on the economic hubs of the Tribes.

Figure 1 – Five County Service Area



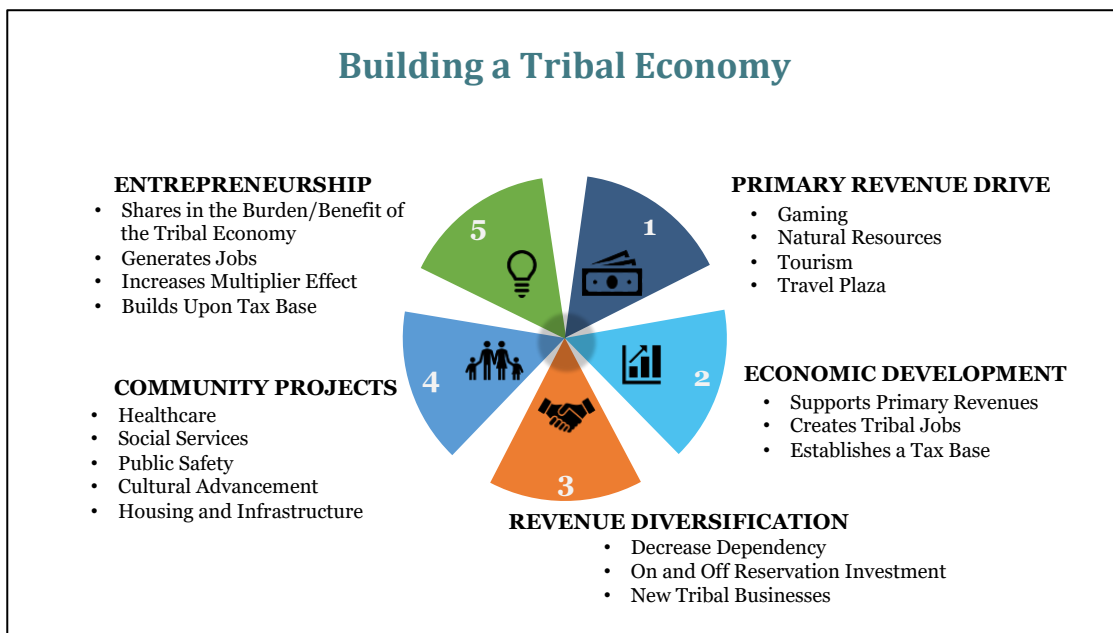


Vision and Mission

The Tribal CEDS is to serve as a foundation of economic well-being and growth going forward. It is critical for CTCLUSI to view its economic system as a holistic, interconnected Tribal economy and to understand that strengthening key sectors can create financial self-sustainability, provide long-term quality career job opportunities, needed services for members, and support in protecting and executing Tribal sovereignty.

A Tribal economy should be envisioned as holistically inclusive of both economic development and community development projects working together to create a stable, self-sustaining economy. Blue Stone has found that all too often, Tribe's confuse economic development and community development as being the same. Community development utilizes financial resources to provide social, cultural, and other types of life services for Tribal membership; usually the expected return is servicing the needs of the community. Economic development projects use financial resources to generate revenues, financial return on investments, and work towards financial self-sustainability in providing Tribal Member jobs, products, and operational services.

Based on Blue Stone's experience, best practices show there are five key pillars in building a Tribal economy, and it is the combination of these pillars that promote the economic success of a Nation. This graphic depicts how economic development diversification – for example, expanding beyond gaming, natural resources, Tourism etc. – allows the Tribal organization to create additional development opportunities that help to stabilize market and consumer fluctuations, thus promoting sustainability for generations to come. Commitment to diversification





of revenue streams will support a balanced economic development agenda and job creation.

Economic Vision Statement Input

CTCLUSI has initiated the economic visioning process; refinement of the Tribes' economic vision statement is a continual process.

Initial input received from Tribal Leadership regarding the economic vision for the Tribe include the desire to expand programs and services to the growing population over the next ten years, which will need to overcome challenges of hiring and retaining qualified staff to support the growth of the Nation. In defining success for the Tribes, Tribal Leadership describes a future in which the Tribes have multiple sources of revenue-generating enterprises capable of providing strong employment/career opportunities for Tribal members, and a diversified, resilient, and growing economy independent from gaming to ensure a strong source for the Tribal governments general fund.

Economic Vision Input:

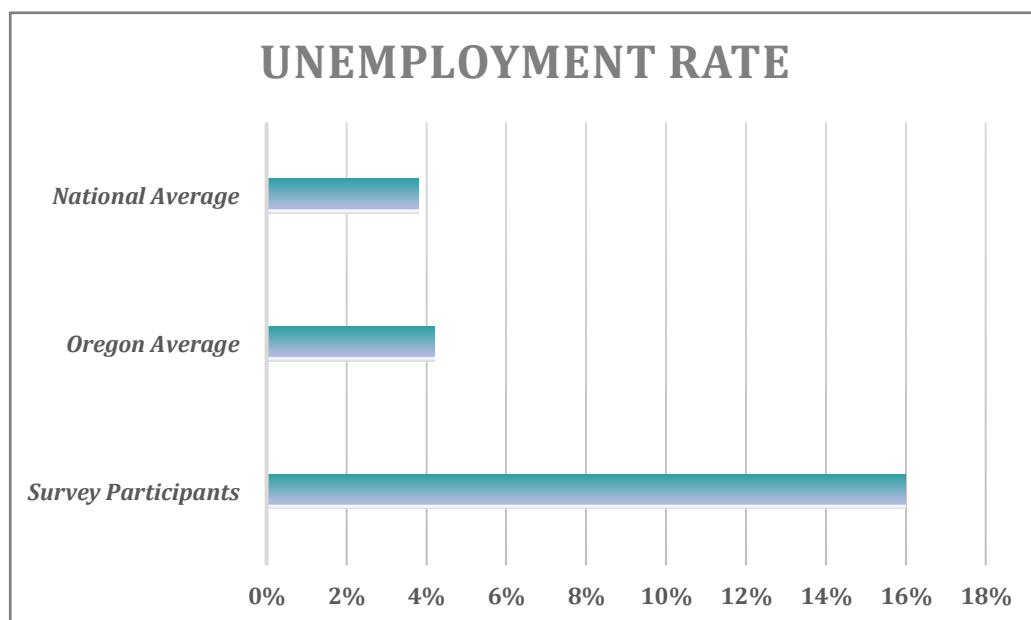
- Expand programs and services
- Meaning of success: "Having multiple sources of revenue generating enterprises that can provide employment opportunities to Tribal members as well."



Community Engagement

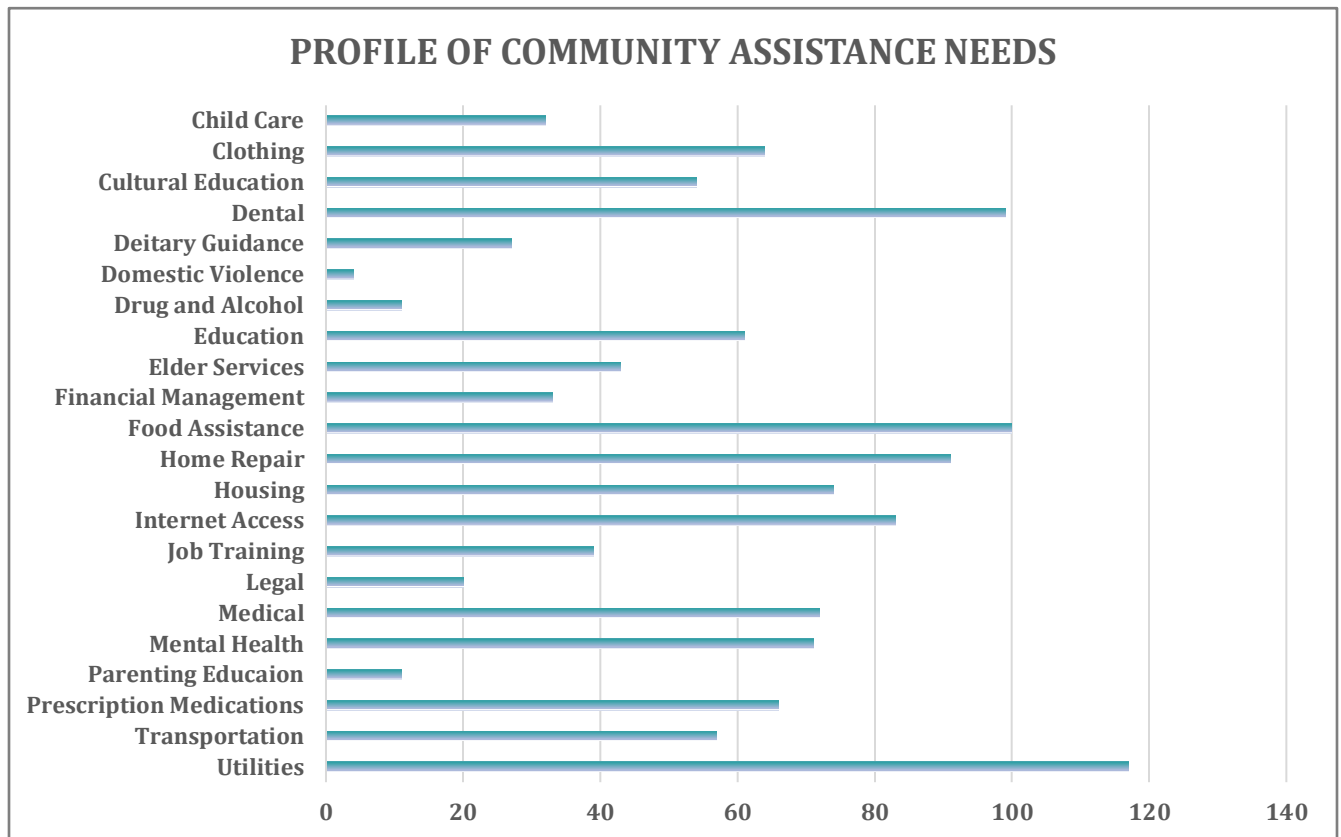
Community engagement is a cornerstone of any successful planning process. Understanding this, the Strategy Committee (*project steering*) participated in the CEDS process to ensure private and public stakeholder input was gathered and adhered to. This input was centrally gathered through a community survey conducted from October to November, 2021. The survey sought to gather the community's perspective on the current economic situation in the region, and their priorities for continued economic development efforts.

Of survey participants, 16% reported they were unemployed compared to 4.2% in the state of Oregon and only 3.8% nationally. An additional 24% reported as either retired or unable to work. 3% of



participants reported being homeless, compared to a homelessness rate of less than 1% nationally. Finally, only 30% of participants reported an average income at or above the estimated national median of \$67,521. These numbers indicate that the CTCLUSI community workforce is both smaller and disproportionately depressed compared to the state and national economy. A deeper analysis of the regional economy is included in the following section, *Economic Assessment*.

In addition to gathering employment and income statistics, the CEDS survey sought to establish a deeper profile of the respondents. Participants were asked to give a profile of their needs across 22 potential areas, such as utility assistance or mental health support. The table below shows the responses in each area.



The top-ten areas of indicated need are in foundational areas of economic and medical stability:

1. Utilities
2. Food Assistance
3. Dental
4. Home Repair
5. Internet Access
6. Medical
7. Mental Health
8. Prescription Medication
9. Clothing
10. Education

These areas of need represent areas of opportunity for the Tribes' future priorities in economic, community, and workforce development, such as housing, healthcare, broadband, and transportation.

As to the community's perspective on an economic development strategy, there are a number of interesting points to consider. From a high-level priority perspective, the survey participants centrally supported economic development through the creation of businesses

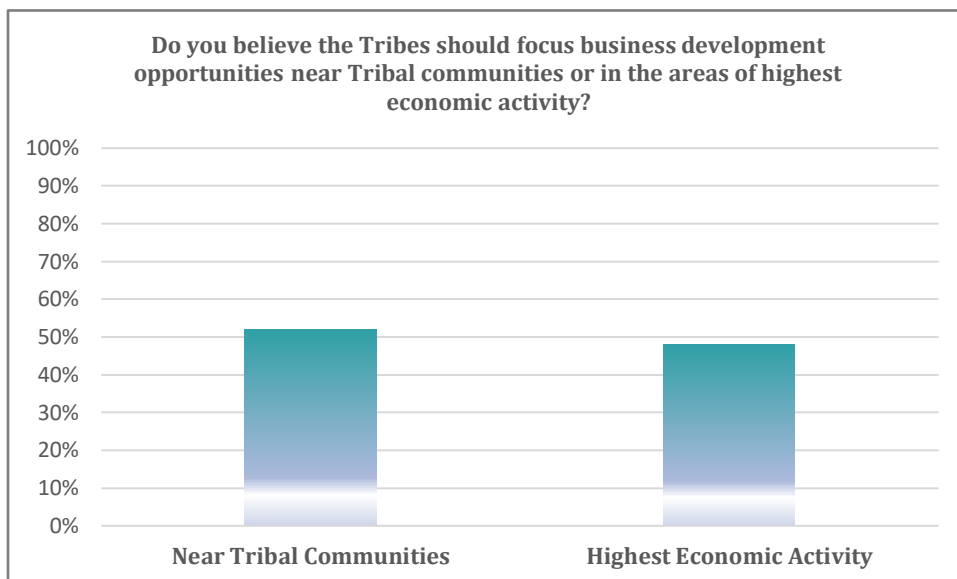


that support the needs of the community in goods, services, and workforce development:

When it comes to economic development for the Confederated Tribes, what should the main considerations be when the Tribal Council selects which businesses to invest in?

- 1. Providing goods and services needed by the community*
- 2. Creating jobs and career development opportunities for Tribal members*
- 3. Generating economic profits to increase income for the Tribes*
- 4. Balancing cultural preservation with economic vitality*
- 5. Creating wholesome entertainment options for youth and family entertainment*

These responses indicate that the community supports a holistic economic development strategy that benefits the development of the Tribal community and its membership. However, when asked whether development efforts should be focused near Tribal communities or in areas of highest economic activity, the responses were evenly divided. Taking both of these data items into consideration, it seems that the community supports a highly balanced approach to economic development, and would likely support the Tribes' priority of creating an economic development corporation for off-reservation investment.



Another set of data points that were collected from the survey were the participants' views on developing and executing an economic diversification strategy. The participants were asked to indicate which industries/businesses they would support the Tribes investing in from a list of 16 initially identified opportunities in the region.



As the Confederated Tribes look to diversify our economy, which industries/businesses would you support us moving into?

- | | |
|--------------------------|----------------------------|
| 1. Rentals | 9. Construction |
| 2. RV Resort | 10. Cannabis |
| 3. C-Store/Gas Station | 11. Restaurant |
| 4. Timber | 12. Manufacturing |
| 5. Agriculture | 13. Hemp |
| 6. Family Entertainment | 14. Warehouse/Distribution |
| 7. Tourism | 15. Retail |
| 8. Healthcare Businesses | 16. Office Space |

In addition to this, 71% of survey participants indicated that they would support the Tribes in entering into partnerships with other entities to allow for increased development capacity. This data will be used as the Tribes and future economic development corporation begin to assess feasibility of different opportunities and choose investments.

The final data point for consideration in this CEDS is for small business development. Of the participants, 96 (38%) indicated that they would be interested in starting their own business. In considering future economic development strategies, this is a strong indication that the Tribes should increase the availability of small business resources, both in funding and technical assistance support.

Below is a summary of percentage responses for each question:

Housing		
Homeless	8	3%
Live with family/friend	5	2%
Own	100	40%
Rent	123	49%
Temporary housing	10	4%



Income		
0 - 12,880	45	18%
12,881 - 16,100	13	5%
16,101 - 19,320	9	4%
19,321 - 22,540	17	7%
22,541 - 25,760	21	8%
25,761 - 35,000	26	10%
35,001 - 45,000	22	9%
45,001 - 60,000	24	10%
60,001 - 75,000	21	8%
75,001 - 90,000	13	5%
90,001 - 105,000	12	5%
105,001 - 120,000	19	8%
Blank	9	4%

Areas of Assistance		
Utilities	117	
Transportation	57	
Prescription Medications	66	
Parenting Education	11	
Mental Health	71	
Medical	72	
Legal	20	
Job Training	39	
Internet Access	83	
Housing	74	
Home Repair	91	
Food Assistance	100	
Financial Management	33	
Elder Services	43	
Education	61	
Drug and Alcohol	11	
Domestic Violence	4	
Dietary Guidance	27	
Dental	99	
Cultural Education	54	
Clothing	64	
Child Care	32	



Employment Status		
Employed outside the Tribes	101	40%
Retired	39	16%
Unemployed/Looking for Work	38	16%
Employed by the Tribes	21	8%
Unable to work	21	8%
Self employed	17	6%
Student	7	3%
Homemaker	6	2%
Military	1	1%

Reason for not working for Tribes		
Not enough positions in my area	76	30%
Other	86	43%
Blank	21	9%
Underqualified	14	6%
Do not want to work for Tribes	14	6%
Retired	13	5%
Overqualified	3	1%

Industry Supported		
Warehouse/Distribution	91	
Tourism	105	
Timber	114	
RV Resort	128	
Retail	86	
Restaurant	98	
Rentals	130	
Office Space	62	
Manufacturing	96	
Hemp	92	
Healthcare Businesses	104	
Family Entertainment	108	
C-Store/Gas Station	114	
Construction	101	
Cannabis	100	
Agriculture	112	



Ranking		
Providing Goods/Services	1	
Creating Wholesome Entertainment	5	
Economic Profits to Increase Income	3	
Jobs/Career Development	2	
Balancing cultural preservation	4	

Focus of Business Development		
Near Tribal Communities	121	52%
Highest Economic Activity	116	48%

Tribe going into partnerships		
Support	177	71%
Against	60	24%
Blank	14	5%

Job Opportunities to start or continue career		
No	136	54%
Yes	78	31%
Blank	37	15%

Would you like to start your own business		
No	138	55%
Yes	96	38%
Blank	17	7%



Economic Assessment

The CTCLUSI Comprehensive Economic Development Strategy includes economic and workforce data for both Coos and Lane Counties. The largest Tribal population centers are in Coos Bay, North Bend, Charleston, and Florence; all ancestral territory. These four cities have microeconomies that are reflective of the larger county economies, and the two counties share common industry characteristics. Largest sectors in both counties in 2020 were Education and Hospitals (Local Government), Restaurants and Other Eating Places, and Local Government, excluding Education and Hospitals.

Section 1 in the Economic Assessment provides an overview of economic and labor trends including important indicators that signal opportunities for growth, such as largest GRP industry sectors and location quotients that reflect a relative density of employment in a specific sector. Real-time labor market information through job postings can signal opportunities for workforce development that make the Tribal workforce more competitive. Section 2 provides comparative economic profiles for twelve retail-based industry sub-sectors. Industry metrics are compared across Coos, Lane, and Douglas Counties reflecting consumer demand for products throughout the microregion. Section 3 provides an overview of regional economic plans and identifies areas of alignment with Tribal economic development priorities. Suggested strategies have been included to enhance the development of regional partnerships.

Section 1: Industry and Employment Trends

Table 1. Comparative Regional Indictors

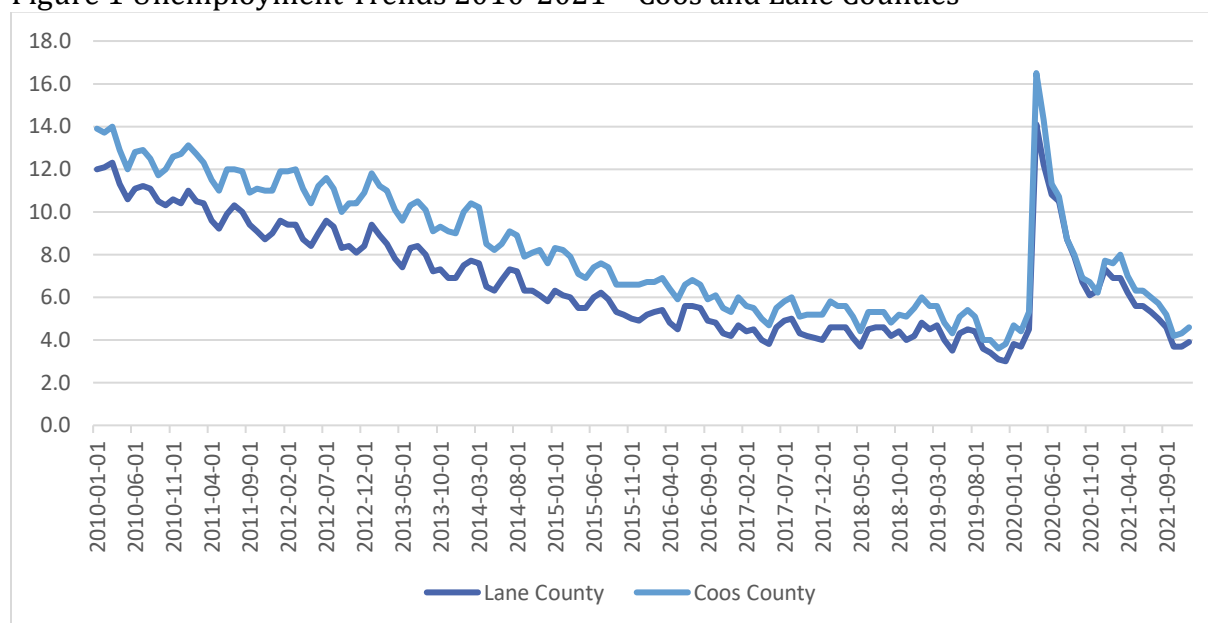
Regional Metrics	Lane County	Douglas County	Coos County
Population (2015)	362,257	107,260	62,696
Population (2020)	382,986	111,364	64,711
Population Change %	6%	4%	3%
Jobs (2015)	166,787	41,064	25,804
Jobs (2020)	167,651	41,905	25,541
Jobs Change %	1%	2%	(1%)
Current Average Earnings	\$59,512	\$55,528	\$54,272
COL Index	116.1	113.7	116.4
GRP	\$16,883,497,316.50	\$3,911,145,607.57	\$2,369,115,773.84
Exports	\$17,565,242,487.00	\$6,686,668,535.18	\$3,067,728,557.92
Imports	\$19,678,259,227.30	\$6,414,320,227.18	\$3,548,446,176.83
Labor Force (Aug 2021)	180,009	48,188	26,840
Unemployment Rate % (Aug 2021)	5.0%	5.6%	5.8%
Median Household Income (2019)	\$52,426	\$47,267	\$45,051

Source: U.S. BLS QCEW; Economic Modeling Inc. Emsi.



Unemployment in Lane and Coos Counties has declined steadily since the 2008 Great Recession with the lowest point occurring in November and December of 2019 during which time there was a 3.0% unemployment rate in Lane County and 3.6% unemployment in Coos County. Pandemic closures significantly impacted the unemployment rate in these counties, with the peak in April of 2020 showing Coos County at an unemployment rate of 16.5% while Lane County had a peak unemployment rate of 14.1%. While there has been some recovery since the easing of pandemic restrictions, unemployment in Lane and Coos Counties remains higher than pre-pandemic levels at 3.9% and 4.6% respectively.

Figure 1 Unemployment Trends 2010-2021 – Coos and Lane Counties

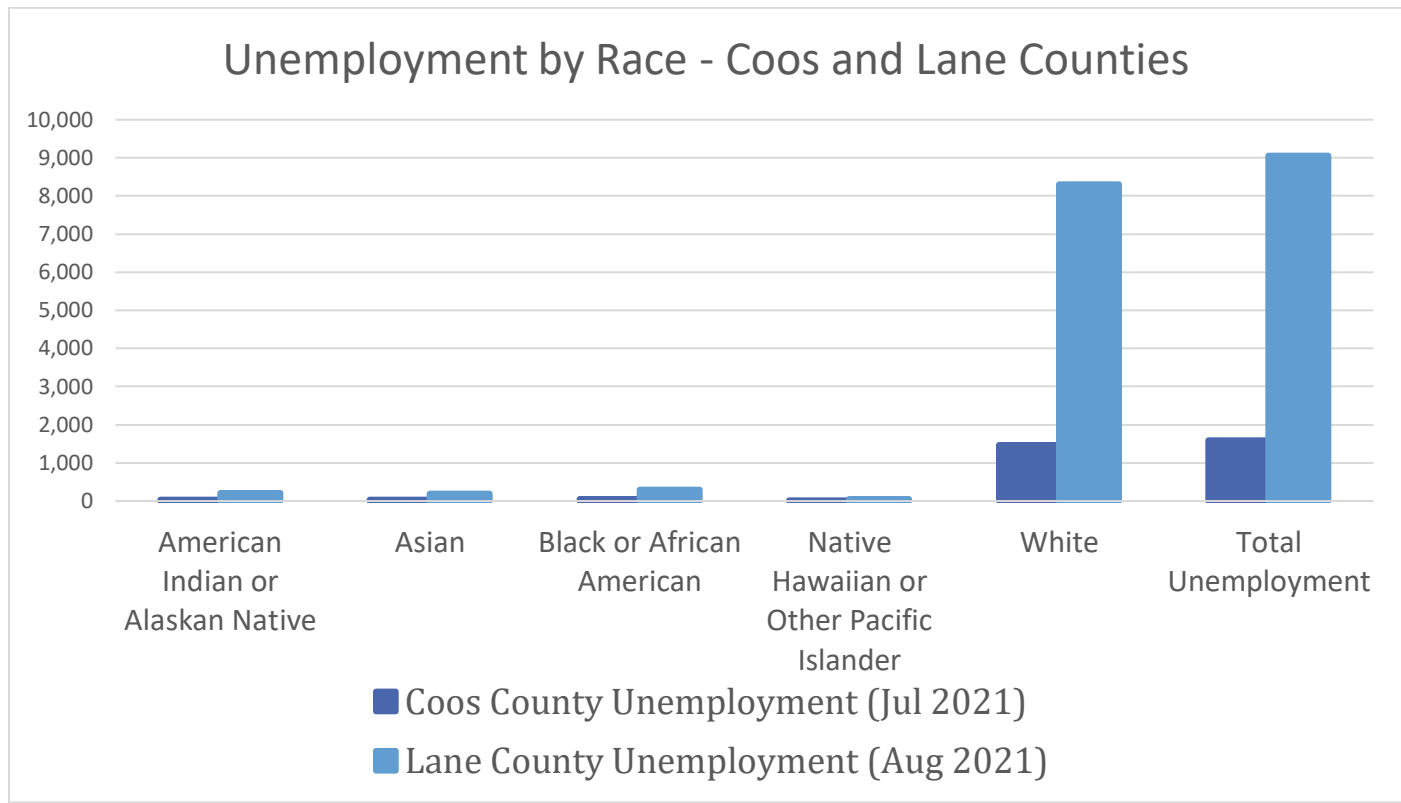


Source: Federal Reserve Bank of St. Louis, Economic Research Division

Figure 2 breaks down unemployment by race for the months of July and August 2021. Lane County displays an unemployment rate for American Indians at 2.6% (212 people).



Figure 2 Unemployment by Race (July and August 2021)



Source: U.S. BLS Unemployment Survey; Economic Modeling Inc. Emsi

*Minority data comparison:

Race	Coos County Unemployment (Jul 2021)	Lane County Unemployment (Aug 2021)	% of Cohort
American Indian or Alaskan Native	41	212	2.59%
Asian	31	196	1.92%
Black or African American	50	296	3.14%
Native Hawaiian or Other Pacific Islander	7	55	0.42%



Table 2. Largest Occupations – Coos County

Occupation	Oct 2020 - Sep 2021 Average Monthly Postings	2015 Jobs	2020 Jobs	Change in Jobs	% Change in Jobs	2020 LQ	2020 Median Hourly Earnings
Office and Administrative Support	238	3,275	3,183	(92)	(3%)	1.00	\$17.28
Transportation and Material Moving	242	2,205	2,335	130	6%	1.09	\$17.81
Sales and Related	319	2,576	2,316	(261)	(10%)	0.98	\$14.46
Food Preparation and Serving Related	75	2,099	2,080	(19)	(1%)	1.14	\$12.35
Healthcare Practitioners and Technical	784	1,422	1,573	151	11%	1.07	\$43.68
Educational Instruction and Library	81	1,557	1,435	(122)	(8%)	0.95	\$20.30
Management	700	1,177	1,412	234	20%	0.89	\$35.89
Healthcare Support	111	1,429	1,368	(60)	(4%)	1.17	\$14.12
Production	30	1,432	1,280	(152)	(11%)	0.89	\$18.64
Building and Grounds Cleaning and Maintenance	49	1,304	1,220	(84)	(6%)	1.34	\$14.20
Construction and Extraction	33	1,078	1,170	92	8%	0.98	\$22.83
Personal Care and Service	21	1,212	1,142	(69)	(6%)	1.59	\$12.87
Installation, Maintenance, and Repair	70	1,146	1,128	(18)	(2%)	1.13	\$20.52
Farming, Fishing, and Forestry	2	903	832	(71)	(8%)	4.20	\$19.20
Business and Financial Operations	261	569	751	182	32%	0.50	\$28.76
Community and Social Service	95	597	554	(43)	(7%)	1.21	\$22.03
Protective Service	29	533	453	(80)	(15%)	0.81	\$23.06
Arts, Design, Entertainment, Sports, and Media	86	288	296	8	3%	0.65	\$16.94
Life, Physical, and Social Science	47	293	267	(26)	(9%)	1.10	\$27.80
Computer and Mathematical	513	183	218	35	19%	0.28	\$32.92
Military-only	0	195	211	16	8%	1.32	\$17.05
Architecture and Engineering	65	202	190	(12)	(6%)	0.44	\$35.14
Legal	21	127	122	(5)	(4%)	0.55	\$30.10

Source: U.S. BLS QCEW; Economic Modeling Inc. Emsi



Table 3. Largest Occupations – Lane County

Occupation	Oct 2020 - Sep 2021 Average Monthly Job Postings	2015 Jobs	2020 Jobs	Change in Jobs	% Change in Jobs	2020 LQ	2020 Median Hourly Earnings
Office and Administrative Support	1,375	22,127	21,479	(648)	(3%)	1.03	\$18.24
Sales and Related	1,456	18,405	16,241	(2,164)	(12%)	1.05	\$15.06
Food Preparation and Serving Related	784	14,935	13,976	(958)	(6%)	1.16	\$12.65
Transportation and Material Moving	1,735	12,526	13,407	881	7%	0.96	\$16.69
Educational Instruction and Library	474	11,006	10,635	(370)	(3%)	1.07	\$24.55
Management	967	9,422	10,126	704	7%	0.97	\$37.11
Production	472	10,240	10,051	(188)	(2%)	1.07	\$17.55
Healthcare Practitioners and Technical	2,650	8,564	9,820	1,256	15%	1.02	\$41.71
Healthcare Support	613	8,164	9,512	1,349	17%	1.23	\$15.24
Construction and Extraction	208	6,526	7,534	1,008	15%	0.96	\$23.56
Business and Financial Operations	596	5,858	7,360	1,502	26%	0.74	\$28.07
Building and Grounds Cleaning and Maintenance	250	6,480	6,216	(265)	(4%)	1.04	\$13.60
Installation, Maintenance, and Repair	532	6,163	6,134	(29)	(0%)	0.94	\$22.37
Community and Social Service	418	3,978	4,193	215	5%	1.40	\$21.49
Personal Care and Service	285	6,340	4,140	(2,200)	(35%)	0.88	\$13.31
Computer and Mathematical	563	3,278	3,404	126	4%	0.66	\$34.30
Arts, Design, Entertainment, Sports, and Media	239	3,171	3,333	162	5%	1.11	\$19.76
Protective Service	161	2,329	2,612	283	12%	0.71	\$24.45
Life, Physical, and Social Science	225	2,062	2,237	176	9%	1.41	\$30.14
Farming, Fishing, and Forestry	8	1,877	1,902	24	1%	1.46	\$15.52
Architecture and Engineering	214	1,612	1,640	28	2%	0.58	\$35.38
Legal	58	1,185	1,195	10	1%	0.82	\$30.06
Military-only	5	538	502	(36)	(7%)	0.48	\$15.71

Source: U.S. BLS QCEW; Economic Modeling Inc. Emsi



Table 4. Highest Location Quotient – Coos County

Occupation	2020 LQ
Farming, Fishing, and Forestry	4.20
Personal Care and Service	1.59
Building and Grounds Cleaning and Maintenance	1.34
Military-only	1.32
Community and Social Service	1.21
Healthcare Support	1.17
Food Preparation and Serving Related	1.14
Installation, Maintenance, and Repair	1.13
Life, Physical, and Social Science	1.10
Transportation and Material Moving	1.09
Healthcare Practitioners and Technical	1.07
Office and Administrative Support	1.00
Construction and Extraction	0.98
Sales and Related	0.98
Educational Instruction and Library	0.95
Production	0.89
Management	0.89
Protective Service	0.81
Arts, Design, Entertainment, Sports, and Media	0.65
Legal	0.55
Business and Financial Operations	0.50
Architecture and Engineering	0.44
Computer and Mathematical	0.28

Source: U.S. BLS QCEW; Economic Modeling Inc. Emsi



Table 5. Highest Location Quotient – Lane County

Occupation	2020 LQ
Farming, Fishing, and Forestry	1.46
Life, Physical, and Social Science	1.41
Community and Social Service	1.40
Healthcare Support	1.23
Food Preparation and Serving Related	1.16
Arts, Design, Entertainment, Sports, and Media	1.11
Educational Instruction and Library	1.07
Production	1.07
Sales and Related	1.05
Building and Grounds Cleaning and Maintenance	1.04
Office and Administrative Support	1.03
Healthcare Practitioners and Technical	1.02
Management	0.97
Construction and Extraction	0.96
Transportation and Material Moving	0.96
Installation, Maintenance, and Repair	0.94
Personal Care and Service	0.88
Legal	0.82
Business and Financial Operations	0.74
Protective Service	0.71
Computer and Mathematical	0.66
Architecture and Engineering	0.58
Military-only	0.48

Source: U.S. BLS QCEW; Economic Modeling Inc. Emsi

A **location quotient** is a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal what makes a particular region “unique” in comparison to the national average if it is greater than 1.



Table 6. Location Quotient – State or County

The following table displays location quotients by 3-digit SOC code for the year 2020. Location quotients compare the density of employment in a sector for a region as compared to the national average. The LQs listed below exhibit the density of employment for the area listed (by state or county) against the density of employment in that occupation nationwide.

Occupation Description	Coos County, OR	Lane County, OR	Douglas County, OR	Oregon State
Fishing and Hunting Workers	35.31	1.66	6.08	3.66
Forest, Conservation, and Logging Workers	34.86	8.21	44.07	6.17
Supervisors of Farming, Fishing, and Forestry Workers	7.32	2.13	7.73	3.24
Woodworkers	4.07	3.99	8.69	2.65
Other Transportation Workers	2.96	2.18	3.33	1.89
Water Transportation Workers	2.33	0.18	0.48	0.67
Other Personal Care and Service Workers	2.18	0.95	1.89	1.34
Other Healthcare Support Occupations	1.71	1.31	1.68	1.34
Life Scientists	1.68	1.07	2.14	1.48
Tour and Travel Guides	1.54	0.72	0.85	1.03
Other Educational Instruction and Library Occupations	1.53	1.34	1.45	1.11
Life, Physical, and Social Science Technicians	1.45	1.65	2.80	1.81
Animal Care and Service Workers	1.44	1.10	1.41	1.15
Building Cleaning and Pest Control Workers	1.41	0.96	1.04	0.90
Food Processing Workers	1.40	1.20	0.91	1.09
Vehicle and Mobile Equipment Mechanics, Installers, and Repairers	1.33	1.12	1.35	0.92
Military-only occupations	1.32	0.48	0.59	0.45
Motor Vehicle Operators	1.31	1.07	1.48	0.96
Supervisors of Sales Workers	1.28	1.16	1.29	1.09
Other Construction and Related Workers	1.26	0.82	1.10	1.04
Religious Workers	1.25	1.04	1.41	1.19
Food and Beverage Serving Workers	1.24	1.34	1.27	1.10
Counselors, Social Workers, and Other Community and Social Service Specialists	1.21	1.47	1.21	1.12
Grounds Maintenance Workers	1.19	1.26	1.37	1.09
Other Installation, Maintenance, and Repair Occupations	1.18	0.91	1.27	0.89
Financial Clerks	1.17	1.08	1.16	0.99
Healthcare Diagnosing or Treating Practitioners	1.17	1.06	1.01	0.99
Retail Sales Workers	1.14	1.14	1.19	0.96
Secretaries and Administrative Assistants	1.12	1.10	1.08	1.14
Other Management Occupations	1.12	1.07	0.95	1.24
Plant and System Operators	1.10	1.03	1.33	0.73
Agricultural Workers	1.08	0.96	1.04	2.29
Other Production Occupations	1.07	1.20	1.41	1.32



Other Food Preparation and Serving Related Workers	1.06	0.70	0.83	0.95
Cooks and Food Preparation Workers	1.05	0.97	0.93	0.99
Construction Trades Workers	1.04	1.04	1.11	1.15
Other Office and Administrative Support Workers	1.02	1.07	0.99	0.93
Home Health and Personal Care Aides; and Nursing Assistants, Orderlies, and Psychiatric Aides	1.01	1.21	0.90	0.76
Supervisors of Building and Grounds Cleaning and Maintenance Workers	1.01	1.03	0.79	0.85
Other Sales and Related Workers	1.00	1.19	0.99	1.25
Information and Record Clerks	0.97	0.99	0.91	0.92
Top Executives	0.95	0.95	1.03	1.03
Firefighting and Prevention Workers	0.94	1.40	0.86	1.07
Supervisors of Personal Care and Service Workers	0.93	0.78	0.87	0.70
Funeral Service Workers	0.92	0.10	0.74	0.44
Preschool, Elementary, Middle, Secondary, and Special Education Teachers	0.92	0.68	0.96	0.76
Material Moving Workers	0.91	0.89	0.95	0.98
Personal Appearance Workers	0.91	0.95	0.79	0.95
Health Technologists and Technicians	0.89	0.94	0.85	0.74
Social Scientists and Related Workers	0.89	2.17	0.96	1.26
Baggage Porters, Bellhops, and Concierges	0.87	0.21	0.27	0.52
Other Healthcare Practitioners and Technical Occupations	0.87	0.95	0.75	1.09
Entertainment Attendants and Related Workers	0.85	0.51	0.70	0.62
Supervisors of Office and Administrative Support Workers	0.84	0.87	0.78	0.77
Supervisors of Protective Service Workers	0.82	0.63	0.93	0.70
Supervisors of Food Preparation and Serving Workers	0.80	1.18	0.75	0.99
Other Protective Service Workers	0.80	0.78	1.09	0.80
Supervisors of Transportation and Material Moving Workers	0.80	0.67	0.86	0.84
Communications Equipment Operators	0.79	0.87	0.62	0.83
Supervisors of Production Workers	0.79	1.02	1.16	0.92
Supervisors of Installation, Maintenance, and Repair Workers	0.77	0.81	0.78	0.71
Librarians, Curators, and Archivists	0.75	1.06	0.76	0.96
Textile, Apparel, and Furnishings Workers	0.75	1.17	0.82	0.78
Law Enforcement Workers	0.74	0.46	0.66	0.64
Material Recording, Scheduling, Dispatching, and Distributing Workers	0.73	0.98	0.76	0.91
Architects, Surveyors, and Cartographers	0.73	1.25	0.54	1.43
Other Teachers and Instructors	0.71	1.11	0.64	0.98
Media and Communication Equipment Workers	0.69	1.00	0.54	1.20
Supervisors of Construction and Extraction Workers	0.69	0.68	0.71	0.84
Media and Communication Workers	0.68	1.01	0.67	1.15



Electrical and Electronic Equipment Mechanics, Installers, and Repairers	0.67	0.65	0.78	0.82
Occupational Therapy and Physical Therapist Assistants and Aides	0.66	1.08	0.62	0.72
Legal Support Workers	0.64	1.04	0.84	1.07
Postsecondary Teachers	0.63	1.65	0.04	1.10
Entertainers and Performers, Sports and Related Workers	0.63	1.30	0.54	1.21
Rail Transportation Workers	0.62	0.75	0.91	0.76
Sales Representatives, Services	0.61	0.63	0.57	0.76
Art and Design Workers	0.59	1.08	0.64	1.30
Drafters, Engineering Technicians, and Mapping Technicians	0.57	0.67	0.63	1.30
Operations Specialties Managers	0.56	0.87	0.61	1.04
Helpers, Construction Trades	0.52	0.83	0.79	0.74
Business Operations Specialists	0.51	0.80	0.55	1.00
Lawyers, Judges, and Related Workers	0.50	0.71	0.49	0.82
Assemblers and Fabricators	0.48	0.68	0.95	0.78
Financial Specialists	0.48	0.63	0.53	0.82
Advertising, Marketing, Promotions, Public Relations, and Sales Managers	0.44	0.83	0.54	1.25
Physical Scientists	0.43	0.84	0.53	0.82
Metal Workers and Plastic Workers	0.43	0.77	0.59	0.89
Occupational Health and Safety Specialists and Technicians	0.42	0.83	0.55	0.95
Sales Representatives, Wholesale and Manufacturing	0.40	0.98	0.51	0.97
Engineers	0.37	0.46	0.48	1.19



Table 6. Largest Annual Job Openings – Coos County

Occupation	Oct 2020 - Sep 2021 Average Monthly Postings	2015 Jobs	2020 Jobs	Change in Jobs	% Change in Jobs	2020 LQ	2020 Median Hourly Earnings
Healthcare Practitioners and Technical	784	1,422	1,573	151	11%	1.07	\$43.68
Management	700	1,177	1,412	234	20%	0.89	\$35.89
Computer and Mathematical	513	183	218	35	19%	0.28	\$32.92
Sales and Related	319	2,576	2,316	(261)	(10%)	0.98	\$14.46
Business and Financial Operations	261	569	751	182	32%	0.50	\$28.76
Transportation and Material Moving	242	2,205	2,335	130	6%	1.09	\$17.81
Office and Administrative Support	238	3,275	3,183	(92)	(3%)	1.00	\$17.28
Healthcare Support	111	1,429	1,368	(60)	(4%)	1.17	\$14.12
Community and Social Service	95	597	554	(43)	(7%)	1.21	\$22.03
Arts, Design, Entertainment, Sports, and Media	86	288	296	8	3%	0.65	\$16.94
Educational Instruction and Library	81	1,557	1,435	(122)	(8%)	0.95	\$20.30
Food Preparation and Serving Related	75	2,099	2,080	(19)	(1%)	1.14	\$12.35
Installation, Maintenance, and Repair	70	1,146	1,128	(18)	(2%)	1.13	\$20.52
Architecture and Engineering	65	202	190	(12)	(6%)	0.44	\$35.14
Building and Grounds Cleaning and Maintenance	49	1,304	1,220	(84)	(6%)	1.34	\$14.20
Life, Physical, and Social Science	47	293	267	(26)	(9%)	1.10	\$27.80
Construction and Extraction	33	1,078	1,170	92	8%	0.98	\$22.83
Production	30	1,432	1,280	(152)	(11%)	0.89	\$18.64
Protective Service	29	533	453	(80)	(15%)	0.81	\$23.06
Personal Care and Service	21	1,212	1,142	(69)	(6%)	1.59	\$12.87
Legal	21	127	122	(5)	(4%)	0.55	\$30.10
Farming, Fishing, and Forestry	2	903	832	(71)	(8%)	4.20	\$19.20

Source: U.S. BLS QCEW; Economic Modeling Inc. Emsi



Table 7. Largest Annual Job Openings – Lane County

Occupation	Oct 2020 - Sep 2021 Average Monthly Postings	2015 Jobs	2020 Jobs	Change in Jobs	% Change in Jobs	2020 LQ	2020 Median Hourly Earnings
Healthcare Practitioners and Technical	2,650	8,564	9,820	1,256	15%	1.02	\$41.71
Transportation and Material Moving	1,735	12,526	13,407	881	7%	0.96	\$16.69
Sales and Related	1,456	18,405	16,241	(2,164)	(12%)	1.05	\$15.06
Office and Administrative Support	1,375	22,127	21,479	(648)	(3%)	1.03	\$18.24
Management	967	9,422	10,126	704	7%	0.97	\$37.11
Food Preparation and Serving Related	784	14,935	13,976	(958)	(6%)	1.16	\$12.65
Healthcare Support	613	8,164	9,512	1,349	17%	1.23	\$15.24
Business and Financial Operations	596	5,858	7,360	1,502	26%	0.74	\$28.07
Computer and Mathematical	563	3,278	3,404	126	4%	0.66	\$34.30
Installation, Maintenance, and Repair	532	6,163	6,134	(29)	(0%)	0.94	\$22.37
Educational Instruction and Library	474	11,006	10,635	(370)	(3%)	1.07	\$24.55
Production	472	10,240	10,051	(188)	(2%)	1.07	\$17.55
Community and Social Service	418	3,978	4,193	215	5%	1.40	\$21.49
Personal Care and Service	285	6,340	4,140	(2,200)	(35%)	0.88	\$13.31
Building and Grounds Cleaning and Maintenance	250	6,480	6,216	(265)	(4%)	1.04	\$13.60
Arts, Design, Entertainment, Sports, and Media	239	3,171	3,333	162	5%	1.11	\$19.76
Life, Physical, and Social Science	225	2,062	2,237	176	9%	1.41	\$30.14
Architecture and Engineering	214	1,612	1,640	28	2%	0.58	\$35.38
Construction and Extraction	208	6,526	7,534	1,008	15%	0.96	\$23.56
Protective Service	161	2,329	2,612	283	12%	0.71	\$24.45
Legal	58	1,185	1,195	10	1%	0.82	\$30.06
Farming, Fishing, and Forestry	8	1,877	1,902	24	1%	1.46	\$15.52
Military-only	5	538	502	(36)	(7%)	0.48	\$15.71

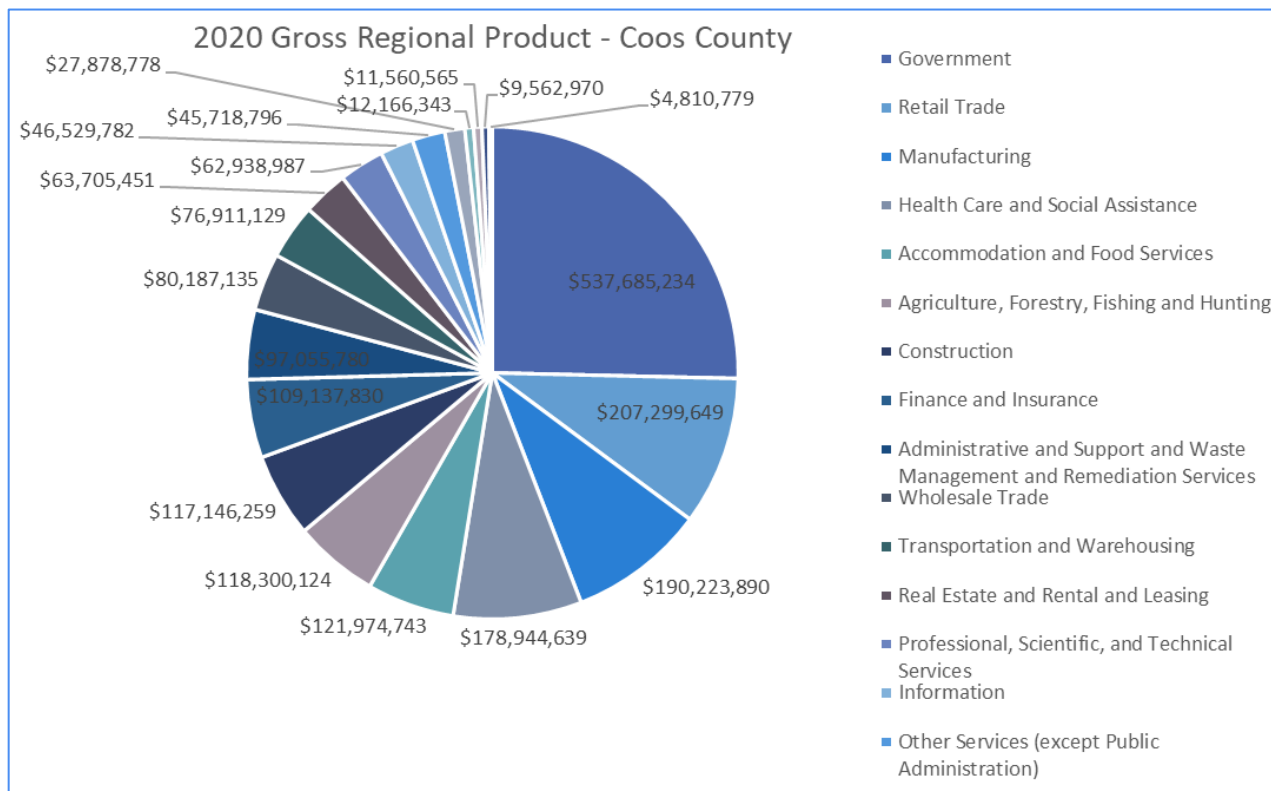
Source: U.S. BLS QCEW; Economic Modeling Inc. Emsi



Economic Output

Gross regional product (GRP) measures the final market value of all goods and services produced in the region of study, it is an indicator of economic output. GRP is comprised of worker and proprietor earnings, sector profits, and taxes paid on production. Any subsidies received by the sector are subtracted from total GRP.

Figure 1. Gross Regional Product – Coos County



Government, Retail Trade, and Manufacturing are the largest contributors to regional economic growth in Coos County.

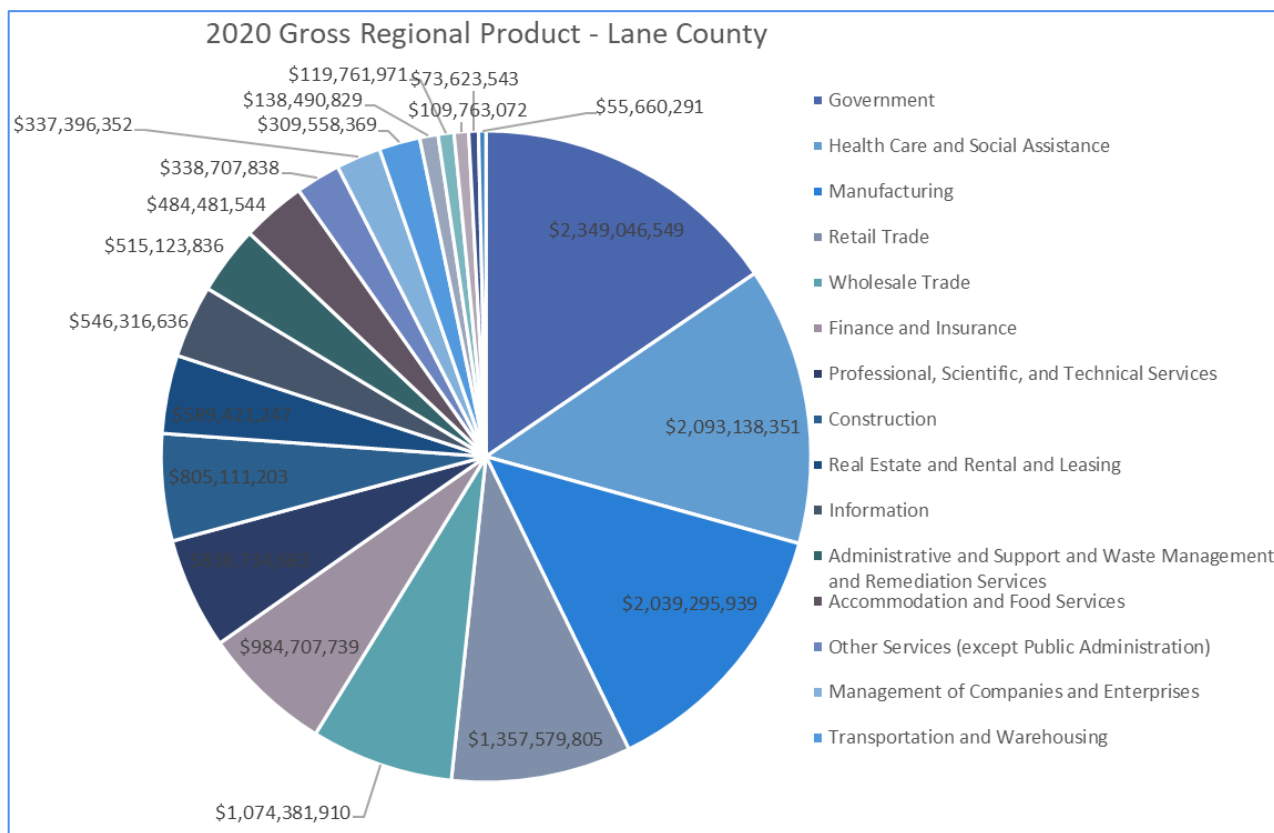


Industry	2020 GRP
Government	\$537,685,234
Retail Trade	\$207,299,649
Manufacturing	\$190,223,890
Health Care and Social Assistance	\$178,944,639
Accommodation and Food Services	\$121,974,743
Agriculture, Forestry, Fishing and Hunting	\$118,300,124
Construction	\$117,146,259
Finance and Insurance	\$109,137,830
Administrative and Support and Waste Management and Remediation Services	\$97,055,780
Wholesale Trade	\$80,187,135
Transportation and Warehousing	\$76,911,129
Real Estate and Rental and Leasing	\$63,705,451
Professional, Scientific, and Technical Services	\$62,938,987
Information	\$46,529,782
Other Services (except Public Administration)	\$45,718,796
Utilities	\$27,878,778
Arts, Entertainment, and Recreation	\$12,166,343
Educational Services	\$11,560,565
Management of Companies and Enterprises	\$9,562,970
Mining, Quarrying, and Oil and Gas Extraction	\$4,810,779

Source: U.S. BLS QCEW; Economic



Figure 2. Gross Regional Product – Lane County



Government, Healthcare and Social Assistance, Manufacturing and Retail are the largest contributors to regional economic growth in Lane County.



Industry	2020 GRP
Government	\$2,349,046,549
Health Care and Social Assistance	\$2,093,138,351
Manufacturing	\$2,039,295,939
Retail Trade	\$1,357,579,805
Wholesale Trade	\$1,074,381,910
Finance and Insurance	\$984,707,739
Professional, Scientific, and Technical Services	\$838,734,683
Construction	\$805,111,203
Real Estate and Rental and Leasing	\$589,421,247
Information	\$546,316,636
Administrative and Support and Waste Management and Remediation Services	\$515,123,836
Accommodation and Food Services	\$484,481,544
Other Services (except Public Administration)	\$338,707,838
Management of Companies and Enterprises	\$337,396,352
Transportation and Warehousing	\$309,558,369
Agriculture, Forestry, Fishing and Hunting	\$138,490,829
Arts, Entertainment, and Recreation	\$119,761,971
Educational Services	\$109,763,072
Utilities	\$73,623,543
Mining, Quarrying, and Oil and Gas Extraction	\$55,660,291

Source: U.S. BLS QCEW; Economic

Both Coos and Lane Counties display characteristics that make them uniquely suited for export-oriented sectors like Hospitality (Retail Trade, Accommodation, and Food Services) and Manufacturing, along with local services such as Government and Healthcare and Social Assistance.



Table 8. Largest Industries – Coos County

Industry	2015 Jobs	2020 Jobs	Change in Jobs	% Change in Jobs	2020 LQ	2020 Earnings Per Worker
Government	6,463	5,712	(751)	(12%)	1.46	\$78,917
Health Care and Social Assistance	3,030	3,323	293	10%	1.00	\$46,652
Retail Trade	3,194	3,152	(42)	(1%)	1.26	\$39,299
Accommodation and Food Services	2,433	2,431	(2)	(0%)	1.32	\$27,388
Administrative and Support and Waste Management and Remediation Services	1,760	1,993	232	13%	1.29	\$35,790
Manufacturing	1,858	1,705	(153)	(8%)	0.85	\$63,978
Construction	1,090	1,399	309	28%	0.94	\$63,406
Agriculture, Forestry, Fishing and Hunting	1,320	1,280	(40)	(3%)	4.06	\$61,926
Other Services (except Public Administration)	1,232	1,025	(207)	(17%)	0.77	\$26,780
Transportation and Warehousing	884	805	(78)	(9%)	0.78	\$60,771
Professional, Scientific, and Technical Services	596	598	2	0%	0.34	\$63,755
Finance and Insurance	472	536	64	13%	0.49	\$75,345
Wholesale Trade	356	413	57	16%	0.44	\$59,132
Real Estate and Rental and Leasing	302	313	10	3%	0.71	\$50,831
Arts, Entertainment, and Recreation	257	250	(7)	(3%)	0.69	\$30,159
Educational Services	133	230	97	72%	0.35	\$46,585
Information	214	173	(41)	(19%)	0.37	\$58,114
Management of Companies and Enterprises	125	113	(12)	(10%)	0.30	\$72,307
Utilities	52	46	(5)	(10%)	0.52	\$145,557
Mining, Quarrying, and Oil and Gas Extraction	29	22	(6)	(22%)	0.25	\$72,515



Table 9. Largest Industries – Lane County

Industry	2015 Jobs	2020 Jobs	Change in Jobs	% Change in Jobs	2020 LQ	2020 Earnings Per Worker
Health Care and Social Assistance	25,343	28,252	2,909	11%	1.29	\$62,915
Government	27,202	26,774	(429)	(2%)	1.05	\$79,979
Retail Trade	20,983	20,316	(667)	(3%)	1.23	\$41,267
Manufacturing	13,880	14,415	535	4%	1.10	\$70,407
Accommodation and Food Services	14,784	12,820	(1,963)	(13%)	1.06	\$23,456
Administrative and Support and Waste Management and Remediation Services	9,549	9,420	(129)	(1%)	0.93	\$41,398
Construction	7,794	9,223	1,429	18%	0.95	\$65,439
Other Services (except Public Administration)	8,926	7,585	(1,342)	(15%)	0.87	\$33,000
Professional, Scientific, and Technical Services	7,173	7,579	405	6%	0.66	\$72,272
Wholesale Trade	6,132	6,094	(38)	(1%)	1.00	\$69,829
Finance and Insurance	4,510	4,395	(115)	(3%)	0.62	\$97,555
Transportation and Warehousing	3,594	3,607	13	0%	0.53	\$59,259
Management of Companies and Enterprises	2,317	3,505	1,189	51%	1.43	\$85,959
Real Estate and Rental and Leasing	3,123	3,268	145	5%	1.14	\$56,427
Agriculture, Forestry, Fishing and Hunting	2,539	2,920	381	15%	1.41	\$55,708
Educational Services	2,324	2,357	33	1%	0.55	\$39,362
Arts, Entertainment, and Recreation	2,749	2,355	(394)	(14%)	0.99	\$27,385
Information	3,488	2,234	(1,254)	(36%)	0.73	\$87,046
Mining, Quarrying, and Oil and Gas Extraction	223	229	6	3%	0.39	\$79,798
Utilities	142	145	3	2%	0.25	\$125,961

Section 2: Retail Comparison

The following twelve regional industry comparisons walk through seven data points to assist in identifying areas of retail gaps and growth opportunity. Job quantity for 2020 is compared across Lane, Douglas, and Coos Counties. Job change percentage from 2015-2020 is given along with average annual earnings per worker. A location quotient is then displayed, which is a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the Nation. It can reveal what makes a particular region “unique” in comparison to the national average if it is greater than 1. The competitive effect as the aggregate number of actual jobs in the industry sub-sector beyond what was expected for industry growth and national economic growth. Finally, the percent of demand



for the product met within the region is shown followed by the demand met for imports in dollars. These last two metrics can point towards opportunities for growth if the percent of demand met in the region is low compared to neighboring counties. A high value of demand met by imports will also signal a gap in current services.

Full-Service Restaurants	Lane County, OR	Douglas County, OR	Coos County, OR
Jobs (2020)	3,974	882	611
Job Change %	(24%)	(13%)	(14%)
Earnings (2020)	\$24,760	\$22,339	\$23,979
Jobs LQ (2020)	0.92	0.82	0.93
Competitive Effect	(95)	91	62
% Demand Met In-Region	94.0%	73.7%	99.6%
Demand Met by Imports	\$15,234,621.95	\$16,814,253.31	\$155,411.21

Art Dealers	Lane County, OR	Douglas County, OR	Coos County, OR
Jobs (2020)	21	<10	10
Job Change %	(34%)	Insf. Data	(6%)
Earnings (2020)	\$29,307	Insf. Data	\$25,975
Jobs LQ (2020)	0.89	0.96	2.89
Competitive Effect	(7)	1	1
% Demand Met In-Region	32.0%	40.3%	97.8%
Demand Met by Imports	\$3,612,507.99	\$835,903.18	\$18,057.49

Museums	Lane County, OR	Douglas County, OR	Coos County, OR
Jobs (2020)	61	0	17
Job Change %	32%	Insf. Data	(7%)
Earnings (2020)	\$21,282	\$0	\$26,810
Jobs LQ (2020)	0.68	0.00	1.27
Competitive Effect	19	(2)	0
% Demand Met In-Region	24.7%	0.0%	68.0%
Demand Met by Imports	\$8,315,516.33	\$2,924,345.17	\$543,902.98

Convenience Stores	Lane County, OR	Douglas County, OR	Coos County, OR
Jobs (2020)	764	225	120
Job Change %	(4%)	20%	40%
Earnings (2020)	\$25,254	\$24,216	\$26,778
Jobs LQ (2020)	4.42	5.21	4.58
Competitive Effect	(21)	40	36
% Demand Met In-Region	98.7%	96.5%	99.4%
Demand Met by Imports	\$167,753.64	\$115,844.48	\$11,728.12



Gasoline Stations with Convenience Stores	Lane County, OR	Douglas County, OR	Coos County, OR
Jobs (2020)	744	390	89
Job Change %	5%	2%	(16%)
Earnings (2020)	\$26,422	\$25,976	\$21,724
Jobs LQ (2020)	0.83	1.75	0.66
Competitive Effect	10	(7)	(21)
% Demand Met In-Region	61.6%	76.0%	38.7%
Demand Met by Imports	\$40,236,986.95	\$7,243,091.78	\$10,427,193.19

Gambling Industries	Lane County, OR	Douglas County, OR	Coos County, OR
Jobs (2020)	14	0	0
Job Change %	-50%	Insf. Data	Insf. Data
Earnings (2020)	\$29,212	\$0	\$0
Jobs LQ (2020)	0.14	0	0
Competitive Effect	-5	-1	-1
% Demand Met In-Region	11.60%	0.00%	0.00%
Demand Met by Imports	\$21,279,888.62	\$6,389,652.25	\$3,720,757.98

Supermarkets and Other Grocery (except Convenience) Stores	Lane County, OR	Douglas County, OR	Coos County, OR
Jobs (2020)	3,388	786	663
Job Change %	10%	6%	16%
Earnings (2020)	\$38,465	\$35,118	\$37,267
Jobs LQ (2020)	1.22	1.13	1.57
Competitive Effect	259	31	83
% Demand Met In-Region	43.0%	18.3%	32.9%
Demand Met by Imports	\$121,017,413.82	\$45,645,437.31	\$21,821,227.34

Hardware Stores	Lane County, OR	Douglas County, OR	Coos County, OR
Jobs (2020)	128	78	72
Job Change %	(32%)	10%	6%
Earnings (2020)	\$42,126	\$40,324	\$41,059
Jobs LQ (2020)	0.74	1.79	2.73
Competitive Effect	(70)	4	1
% Demand Met In-Region	30.7%	31.4%	55.8%
Demand Met by Imports	\$11,716,228.09	\$2,768,379.30	\$1,090,792.71



Home and Garden Equipment Repair and Maintenance	Lane County, OR	Douglas County, OR	Coos County, OR
Jobs (2020)	15	12	<10
Job Change %	31%	Insf. Data	Insf. Data
Earnings (2020)	\$35,129	\$39,327	Insf. Data
Jobs LQ (2020)	1.59	5.08	0.60
Competitive Effect	3	4	(1)
% Demand Met In-Region	99.9%	100.0%	52.2%
Demand Met by Imports	\$1,219.13	\$27.78	\$56,707.11

Automotive Parts and Accessories Stores	Lane County, OR	Douglas County, OR	Coos County, OR
Jobs (2020)	575	101	75
Job Change %	11%	25%	5%
Earnings (2020)	\$42,002	\$32,265	\$34,341
Jobs LQ (2020)	1.44	1.02	1.24
Competitive Effect	58	21	4
% Demand Met In-Region	71.4%	36.4%	53.3%
Demand Met by Imports	\$11,036,252.77	\$6,255,982.20	\$2,652,098.66

Golf Courses and Country Clubs	Lane County, OR	Douglas County, OR	Coos County, OR
Jobs (2020)	203	70	52
Job Change %	(23%)	(10%)	16%
Earnings (2020)	\$31,585	\$28,115	\$27,011
Jobs LQ (2020)	0.57	0.78	0.95
Competitive Effect	(35)	(0)	11
% Demand Met In-Region	44.6%	50.8%	65.0%
Demand Met by Imports	\$16,663,921.68	\$3,884,901.45	\$1,615,814.31

Fish and Seafood Merchant Wholesalers	Lane County, OR	Douglas County, OR	Coos County, OR
Jobs (2020)	17	0	0
Job Change %	Insf. Data	0%	(100%)
Earnings (2020)	\$63,980	\$0	\$0
Jobs LQ (2020)	0.59	0.00	0.00
Competitive Effect	8	0	(20)
% Demand Met In-Region	58.5%	31.5%	0.0%
Demand Met by Imports	\$2,131,961.19	\$750,625.56	\$606,502.12



Section 3: Regional Alignment - Potential Regional Partnerships

Comprehensive Economic Development Strategy CEDS 2019—2023 - Coos, Curry, and Douglas Counties

The tri-county CEDS identified five priority goals, and the associated vision and action steps for the region. The Natural Resources-Tourism and Environment etc. element highlights tourism as the top strategy for economic development, citing the need for stronger collaboration and alignment across major destination tourism entities in the region. Food production and land leasing are additional strategies that may be of interest for Tribal economic development.



Tri-County CEDS Five Priority Elements

1. Natural Resources—Tourism, Environment, Etc.
2. Transportation
3. Regional Collaboration
4. Public Policy – Housing – Workforce – Community – Health Care
5. Other - broadband, water, sewer, power, alternative energy

**CTCLUSI Canoe Pull Under
North Bend Bridge**

The Natural Resources vision and top synergistic action steps for Tribal partnership are presented below given the close alignment with Tribal economic development priorities.

Natural Resources – Tourism, Environment, Etc.

Vision Statement/Direction—Where do we want to be in several years? While our region is abundant in beauty, natural amenities, ample forests, farmlands, and buildable land, we must balance this as we improve and grow tourism, our timber industry, food/agriculture production, and business. We will continue to seek improvements in the permitting processes, coordinating with our neighboring communities as well as outside of our region. Seek new opportunities in business, as well as new business ideas or improvements. Work towards a balance of quality of life versus timber harvest, economic development, transportation, etc.

Action Steps—How do we get there?

- Work with partners, other communities, and experts (Travel Oregon, Travel Southern Oregon Coast, Oregon South Coast Regional Tourism Network, for example) to improve what we do in our communities as far as promoting tourism.
- In working with partners, coordinate events and calendars that make sense, and encourage visitors and locals to enjoy events and the beauty of our region.



The following strategies are offered within the tri-county area as potential approaches for Tribal economic development to enhance revenue generation for existing and future tourism venues.

Strategies:

1. Outdoor stage venue at Coos Head – With the onset of the pandemic, planning for outdoor entertainment could provide a resilient facet for the Coos Head development or expansion of the Three Rivers Casino. Proximity to urban areas such as Eugene provide the market for a variety of live performance options.
2. Engage with strategic partners in tourism and promotion – Extending marketing and outreach efforts in collaboration with the area destination marketing organizations could enhance Tribal marketing efforts to include additional target populations. Partner Organizations: Travel Oregon, Travel Southern Oregon Coast, Oregon South Coast Regional Tourism Network.



Prosperity for all Oregonians—Business Oregon Strategic Plan—2018-2022

Business Oregon, the state's economic development agency, developed the Strategic Plan for 2018-2022 which identified priority themes and objectives that align with Tribal investments and provide opportunity for future leveraged investment to enhance the existing Casino, Golf Course, and Coos Head Development. Meaningful partnership with Tribal neighbors is highlighted in the top five themes for economic development.

The Business Oregon Strategic Plan presents five strategic priorities including one explicitly aimed and investment in Tribal economic and workforce development, Advance Economic Opportunity for Underrepresented People.

"Explicitly commit to equitable outcomes for communities of color, immigrants, native and tribal populations, and other traditionally underrepresented people. Prioritize investments that counter systemic barriers to economic opportunity."

Strategies:

Through the commitment of this strategic element, the Tribes may benefit from collaboration with Business Oregon on tourism promotion for Tribally-owned venues, small business support services including access to capital through Oregon Growth Fund investments and the agency's early-stage loans and grants, employment opportunities with state government for Tribal members, and expedited permitting reviews for development.



Oregon Business Plan—2018 Policy Playbook

The 2018 Policy Playbook funded by Business Oregon, identifies tourism and hospitality as a priority sector in the plan Vision. The industry is specifically included in the Natural Resources Cluster of Innovative, globally competitive industries. Additional priority industry sectors include Advanced Manufacturing, High Tech, Aviation, Clean Technology, and Footwear, Apparel and Outdoor Gear Creative Industries.

The Oregon Business Plan follows four strategies in order to achieve growth in the priority sectors.

- People: A talented workforce.
- Productivity: Quality infrastructure, resource utilization, competitive regulations, and business costs.
- Place: A high quality of life that attracts and retains talented people.
- Pioneering Innovation: A culture of research, commercialization, and innovation in product and process design.

Strategies:

The Oregon Business Plan further instills priority approaches to economic development for the state. Ensuring Tribal representation on the state workforce board, tourism commissions, and trade organizations will ensure that the Tribes are at the table and aware of the opportunities to leverage state investments for Tribal advantage.





SWOT Analysis

The initial SWOT analysis on the next page was developed based on themes identified in the conducted interviews, initial survey results, and initial background and market research. With the strengths consisting of competent staff, stable leadership, and two proven, sustainable Tribal businesses, the Tribes are capable of accomplishing its vision to create a strong foundation for economic development.

CTCLUSI will need to continue to address weaknesses such as revisiting and/or revitalizing the strategic plan, hiring staff, and finding ways to utilize trust land in the wetlands. Current Tribal Leadership has worked diligently in the structuring of the Tribes' casino-related debt in recent years to the great benefit of the Tribes. Having already addressed this matter in a pragmatic and creative fashion to leverage record low interest rates and the Tribes' good standing with financial institutions, following the agreed upon repayment schedule supports the financial health and lending power of the Tribes.

The below chart provides further detailed around the Tribes' perceived strengths, opportunities, weaknesses, and threats.





SWOT Analysis	
Strengths	Opportunities
<ul style="list-style-type: none"> Existing storage units under the Tribes economic arm (Blue Earth) is perceived to be successful Golf course (Ocean Dunes) is currently self-sustaining, managed solely by the Tribes and comprises over 130 acres of fee land contiguous to the Florence Casino and Reservation land Strong dental services Competent staff Current stability and competency of Tribal Council Regional competitive advantages include forestry, ocean/fisheries, metals, machinery and equipment, tourism, and the airport The majority of community members supports the Tribe going into partnerships Overcoming challenges /stabilization of the Casino related debt 	<ul style="list-style-type: none"> Tourism is a primary economic driver for the region Trust land by the Three Rivers Casino in Coos Bay (smaller casino) Hwy 126 frontage fee land by the Three Rivers Casino in Florence (bigger casino) in Fee to Trust Status Expanding storage units The golf course (maximizing) Infrastructure and property for modern camping is available in desirable locations Partnering with Forestry on Timber initiatives Potential fishing rights Leverage recreational opportunities with the sand dunes Camp Easter Seal; improving quality, tie to cultural heritage, and/or encourage economic opportunity Expanding businesses under Blue Earth Federal Corp Maximize the Tribes' 8(a) Tribal members would like to start a business
Weaknesses	Threats
<ul style="list-style-type: none"> Leadership changes without clear planning for continuity has led to the discontinuation of some Tribal goals Outdated strategic plans The majority of community members do not feel there is a job opportunity to start or continue a career with the Tribes Lack of structure or process to evaluate economic development opportunities quickly and efficiently Lack of diversity in revenue generating Tribal ventures 	<ul style="list-style-type: none"> Changeover in Council due to term limits (three of six Council members are up for re-election in April 2022) Forestry controversy; strains to executing Tribal Sovereignty Scattered parcels of land hinder opportunities for hunting and tourism National shortage in workforce housing and hiring skilled professionals (<i>difficulty in hiring key administrative personnel</i>)



Strategic Priorities

In this section, the four identified priorities are further described, providing a priority description, a source explanation of where information was gathered from to develop this priority, and a discussion section to further explain the opportunity within this priority.

Priority 1: Revitalize Blue Earth Federal Corporation as the
Primary Economic Development Entity

Priority 2: Grow Current Opportunities

Priority 3: Economic Diversification

Priority 4: Support Tribal Members Staying or Returning Home

Priority 1: Revitalize Blue Earth Federal Corporation as the Primary Economic Development Entity

Description: In building and maintaining a strong Tribal economy, it is essential to have a strong economic development entity charged with maintaining and improving the economic conditions of Tribal members and communities, along with implementing strategic plans, executing objectives, and managing programs.

Source:

SWOT - Weaknesses: Leadership changes without clear planning for continuity has led to the discontinuation of some Tribal goals | Outdated strategic plans | Lack of structure or process to evaluate economic development opportunities quickly and efficiently

SWOT - Opportunities: Expanding businesses under Blue Earth Federal Corp | Maximize the Tribes' 8(a)

Discussion: The SWOT analysis conducted as part of planning process for this CEDS identifies Leadership continuity and frequent turnover in Council/Leadership as causing challenges for CTCLUSI. These concerns regarding turnover in leadership likely stem from the fact that strategic priorities and goals can often change with new Tribal Councils. This is not necessarily a fundamental problem with the governing structure but rather an indication that no single entity is working on implementing the strategies defined by planning processes (like a CEDS). Without this central coordinating entity for economic development strategy implementation and management, it is easy to lose focus, duplicate efforts, or needlessly change direction.

It is recommended to revitalize the established Blue Earth Federal Corporation as a starting point to further define roles in economic



governance and to effectively delegate economic implementation and oversight in building a resilient Tribal economy. For future consideration, in expanding the Tribal economy and executing Tribal sovereignty, CTCLUSI could consider a transition to a section 17 corporation with an economic development arm and a business arm that includes Blue Earth Services and Technology. Further, Blue Earth Services and Technology has an opportunity to expand 8(a) initiatives to better compete for federal contracting dollars; to support the ability to expand, recruitment for the replacement of lost 8(a) knowledge and expertise is key. These entities can both provide consistency for economic development work and strategic goal achievement, and bring money into the Tribal communities.

Priority 2: Grow Current Opportunities

Description: CTCLUSI has many opportunities to improve economic conditions for Tribal members and are working towards capitalizing on them. Providing more strategic investments in these opportunities and prioritizing their movement will go a long way in realizing their potential returns.

Source:

SWOT - Strengths: Ocean Dunes golf course is currently self-sustaining, managed solely by the Tribes and comprises over 130 acres of fee land contiguous to the Florence Casino and Reservation land | Strong dental services | Regional competitive advantages - forestry

SWOT - Opportunities: The golf course (maximizing) | Partnering with Forestry on Timber initiatives | Tourism is a primary economic driver for the region | Infrastructure and property for modern camping is available in desirable locations

Regional Alignment - Comprehensive Economic Development Strategy CEDS 2019—2023 - Coos, Curry, and Douglas Counties: “While our region is abundant in beauty, natural amenities, ample forests, farmlands, and buildable land, we must balance this as we improve and grow tourism, our timber industry, food/ag production, and business”

Community Survey – Over 70% of respondents support going into partnerships

Discussion: There are a number of current opportunities that are far enough along in their development that they represent obtainable economic returns for CTCLUSI. These opportunities do require investments of time, money, and attention; but it is important that the momentum attached to these opportunities is maintained and even expanded where possible.



It is recommended that CTCLUSI focus on developing its Forestry Program, by providing the staff and resources needed to position the Tribes to start harvesting and marketing timber. The holistic management approach to the forest management plan is sound, with strong considerations for conservation, Tribal interests, and economic returns on existing assets. It is estimated that, using the holistic forestry approach, 4.7 million board feet can be harvested per year equating to \$1.4 million in net annual sales. To accomplish this, the Tribes would need to fill the vacant forester position and hire additional GIS and log accounting staff; complete the Forest Management Plan, Indian Trust Asset Management Plan, and Operations Plan; and continue with the creation of a Tribal forestry enterprise to assist with timber sale and log marketing. The Tribes can also plan to allow for minor forestry product permitting (mushrooms, firewood, etc.). Finally, a timber sale set aside should be created for acquisition of new forestlands. [information taken from interview with Forest Lands Manager].

There is also an immediate opportunity for CTCLUSI to generate revenue through its existing medical services. These opportunities range from simple assessments to start billing government programs, to expansions of services like dentistry that represent unique core competencies for the Tribes. These same short-term opportunities exist for the golf course and casino. A reconfiguration of hole placement on the course can start and end play at the Casino, enabling an enhanced customer experience and greater revenue potential for the Casino. Another opportunity is to leverage the famous Bandon Dune golf course by offering concierge services, hotel stays, gaming packages, and practice opportunities can be explored and actions taken in the short-term.

Because of CTCLUSI's geographic position in one of the most beautiful, natural, and ecologically maintained areas of the country, expanding and enhancing tourism opportunities is recommended to be a focus. Creating an RV destination location connected to natural and entertainment attractions on or near Tribal lands can create needed economic activity. The Coos Head land development can be re-imagined as an RV resort with phased development. RV parks have also proven to be fairly resilient during the pandemic and many saw increases in occupancy while other tourist destinations saw steep declines in visits and revenues.

Finally, from interviews with Tribal Leaders and members, there is an appetite and the financial wherewithal to engage in real estate investing. What is missing is a process in place to vet and review potential investment opportunities



Priority 3: Economic Diversification

Description: Capitalize on opportunities for CTCLUSI to diversify its economy and become more resilient against shocks to the current system.

Source:

Community Survey - Top 5 industries supported for diversification: Family Entertainment, C-Store/Gas Station, Construction, Cannabis, Agriculture

SWOT - Threats: Lack of diversity in revenue generating Tribal ventures

SWOT - Opportunities: Expanding businesses under Blue Earth Federal Corp; Strong dental services

Discussion: Economic diversification is extremely important. A well-diversified economy is not only less prone to severe disruptions like the one experienced during the COVID-19 pandemic, but also offers greater and more varied opportunities for Tribal members to find meaningful work or launch their own businesses. There are opportunities for economic diversification available to CTCLUSI. A primary purpose of any economic development strategic plan including a CEDS is to distill market analysis data, community input and sentiment, leadership goals and vision, and observations on the ground into feasible recommendations and set of core strategic initiatives. As CTCLUSI diversifies its economy, it will be important to build out a process to efficiently review and evaluate investment opportunities based on existing criteria. It will also be critical for the Tribes to develop a comprehensive land acquisition plan or strategy with clear policies and codes to support a connected Tribal system and strategic growth through a clear vision of maximizing land use and economic expansion. The below paragraphs describe proposed short and long-term economic initiatives for the Tribes to take advantage of current opportunities in strengthening the Tribes resiliency to protect against any future unexpected disasters (like the pandemic).

While there are various sectors for the Tribes to pursue economic diversification, this Plan recommends initially concentrating on c-store(s) and an upgraded RV park/virtual work center. These two diversification efforts should be analyzed first.

There are other opportunities that can be explored at a later date. Among them, the Camp Easter Seal property could be a long-term strategy. This land possesses the potential to serve as an important historic and cultural site, as well as foster outdoor recreation and



tourism. This asset could be set aside for Tribal member enjoyment and reserved as a place away from tourists. While not a traditional diversification strategy as it provides minimum/no revenue, this could certainly provide outdoor access, increased mental and physical health, and communion with cultural practices.

Due to the current and likely continued emergence of remote work availability, a significant subsector of the population has opted to permanently travel. Quickly scanning the hashtag #vanlife will provide insights into these virtual/digital nomads. Expanding the traditional notion of an RV Park to include amenities and resources for people working while out on the road is a strong opportunity for CTCLUSI. Tribal lands are already well positioned for RV travelers and outdoor enthusiasts. Targeting these workers is an interesting and potentially lucrative strategy.

Strongest short-term opportunities:

1. C-Store(s)
2. RV - Van Life/Remote Work
3. Pediatric Dentistry

Expanding the convenience store network on available/future trust lands and expanding dental services are also key diversification targets. Based on the land tour provided, there are two potential sites for c-stores that may complement casino operations.

It is recommended to conduct an assessment of existing dentistry offerings for expansion opportunity, such as third-party billing and pediatric dentistry that yield higher reimbursement rates.

In recapping, short-term, strongest opportunities have been identified as:

1. C-Store(s)
2. RV - Van Life/Remote Work
3. Pediatric Dentistry

Priority 4: Support Tribal Members Staying or Returning Home

Description: Provide employment and entrepreneurship opportunities to Tribal members on Tribal lands. These efforts aim to produce a resilient workforce engaged in a resilient Tribal economy through providing opportunities for Tribal members to build meaningful careers while remaining or returning home.

Source:

Community Survey: Opportunity: 38% of respondents would like to start their own business

Community Survey: 6% of respondents are self employed

Market Analysis: As referenced in Table 7, Lane county average job posting over 1,000 – Healthcare Practitioners and Technical, Transportation and Material Moving, Sales and Related Office and



Administrative Support; Coos County average job postings over 500
- Healthcare Practitioners and Technical, Management, Computer
and Mathematical

Discussion: There are many ways a community can retain and attract young members to remain or return home to Tribal lands/reservation. The key is ensuring that enough opportunity exists for people to want to stay, move back home, or make the Tribal lands their new home. CTCLUSI can accomplish this by encouraging entrepreneurship and new business starts, supporting the growth and expansion of existing private businesses, providing training and resources for remote workers and workforce training, with incentives to fill current vacant jobs.

The Tribes could create training programs and bootcamps for positions available outside of the Tribal lands that can be done remotely. Areas recommended for exploration include software programming/coding, CAD design, AR/VR, etc. One important consideration is job placement for graduates of training programs and bootcamps once the courses have been completed. While working to create or source training programs, CTCLUSI will need to also reach out to potential employers and build pipelines for their graduates. Less skill intensive remote opportunities are also available. Jobs in customer service, personal assistants, collections, etc. are available for remote workers. The Tribes can develop a remote worker office with high-speed internet, individual workstations, and job placement services for Tribal members. There could also be synergies between the RV remote work space and the job placement/remote work center.

CTCLUSI is inherently innovative and entrepreneurial, as indicated by the high number of members interested in starting a business. Launching introductory programs – like bootcamps or experience directed accelerators – can help guide and support individuals interested in starting a business. Creating programs to assist existing businesses maintain or expand their operations is also important.

A potential fit could be the launching an economic gardening program. The National Center for Economic Gardening defines the methodology as “using sophisticated tools for strategic research combined with ‘New Sciences’ analytical frameworks to help local companies scale up and create jobs and wealth in the community.” Providing targeted and sustained support to Tribal business owners and committing to their success is a powerful approach to growing the economy and creating opportunity for members.



Vision, Goals, and Performance

Priority 1: Revitalize Blue Earth Federal Corporation as the Primary Economic Development Entity

VISION: Position CTCLUSI for success by defining the Tribes' economic vision and clarifying governance roles and responsibilities with regards to implementing economic development initiatives and achieving goals and objectives outlined in strategic plans.

Goal 1: Establish Blue Earth Federal Corporation as the Tribes' primary economic development entity.

Objectives:

Re-establish as the entity specifically charged with overseeing economic development activity, managing economic development programs, and implementing economic development strategies.

Performance Measures:

1. Entity charged by Tribal Council to oversee and manage economic development initiatives, with communication and reporting to Tribal Council and Tribal Communities.

Goal 2: Maximize Blue Earth Services and Technology 8(a) opportunities.

Objectives:

Retain/recruit 8(a) expertise to support strategic implementation of the Tribes' 8(a) certification.

Performance Measures:

1. Stronger Blue Earth Services and Technology operations.
2. Implementation and Expansion of the Tribes' 8(a) initiatives providing additional Tribal revenues.



Priority 2: Grow Current Opportunities

VISION: Grow current initiatives and opportunities to become the economic drivers that they are capable of and realize a return on the existing investments of time, talent, and capital.

Goal 1: Begin harvesting and selling timber from the Tribal Forest.

Objectives: One crucial obstacle of beginning a timber sale program for CTCLUSI is the administrative and regulatory burdens placed on the process by federal agencies. The CTCLUSI Forest Management Division identified a more streamlined path towards the goal of timber sales. They are seeking to participate in the Demonstration Project under the Indian Trust Asset Reform Act (ITARA). From the BIA website:

“The Indian Trust Asset Reform Act, P.L. 114-178, was signed into law on June 22, 2016. Title II of the law authorizes the Secretary of the Interior to establish and carry out an Indian trust management demonstration project for tribal forestry and surface leasing programs. The Department of the Interior will hold tribal consultations prior to establishing the demonstration project.

On October 1, 2018, the Assistant Secretary - Indian Affairs, announced the establishment of the Demonstration Project in a Tribal Leader Letter. In addition, further guidance on the ITARA Demonstration Project is available here. The input received from Tribes during the consultation sessions was critical in helping develop the guidelines necessary to move this project forward. The responses to specific comments received during the consultations is available here.”

Gaining BIA approval of an Indian Trust Asset Management Plan (ITAMP) under ITARA is an important step towards achieving this goal.

Performance Measures:

1. Continue with development of an ITAMP under the ITARA Demonstration Project.
2. Complete Forest Management Plan and Operations Plan.



3. Realize estimates for 4.7 million board feet harvested per year equating to \$1.4 million in revenue by year two of harvesting operations.

Goal 2: Generate additional revenue from healthcare services.

Objectives:

Work to enroll more Tribal members in government benefits, which they are eligible for and entitled to, and increase billing for healthcare services.

Performance Measures:

1. 25% increase in Tribal members receiving government benefits after 2 years.
2. 10% increase in accounts receivable for Tribal healthcare services.

Goal 3: Rework golf course to better align recreational and entertainment offerings.

Objectives:

Reconfigure the hole placements on the Ocean Dunes golf course so that the first, ninth, and eighteenth holes are integrated into the Casino complex. Design more opportunities for golf players to eat, stay and gamble before and after their time on the course.

Performance Measures

1. Redesigned course with starting and ending play closer to the Casino complex.
2. 10% increase in overall Casino revenue after first full year of the redesign.

Goal 4: Create a real estate investment portfolio of properties and land within and adjacent to Tribal boundaries.

Objectives:

Create investment criteria for a real estate portfolio and then begin acquiring properties and land. Criteria will include ideal property and land types, purpose, and targeted return on investment.

Performance Measures:

1. Established investment criteria.
2. Established fund overseen by qualified manager(s).



3. Portfolio of properties and land.
4. Returns generated from portfolio after 3 years.

Goal 5: Further capitalize on tourism.

Objectives:

There is opportunity present in the RV market for a new and modern RV park for travelers visiting the Oregon Coast and/traveling along highway 101. There are also immediate opportunities in offering gaming, entertainment, recreation, and concierge packages to visitors playing the famed Bandon Dunes golf course.

Building a modern and inviting RV park along highway 101 and marketing it as a Native American owned and operated facility will attract travelers and tourists. Providing shuttles to and from the Casino and the golf course for people staying at the RV park will provide additional sales per stay. Package deals and other excursions can also be offered.

Performance Measures:

1. Launch RV park.
2. Agreement/deal with Bandon Dunes golf course to shuttle players and/or offer them package visits to the Casino and other offerings.
3. 15% increase in year over year revenues at the Casino 2 years after RV park opening.



Priority 3: Economic Diversification

VISION: Identify areas where CTCLUSI can capitalize on competitive advantage and/or unique assets and positioning to create new economic activity and opportunities.

Goal 1: C-Store plan and development.

Objectives:

The CTCLUSI has a great opportunity to develop and operate convenience stores on their land. These stores will help diversify revenue inputs for Tribal operations and can further serve visitors staying in the area at the new RV park or Casino, or those just passing through. Convenience stores with gas stations and other amenities also present a sovereign tax advantage that CTCLUSI can use to further generate operating revenue for Tribal operations.

Performance Measures:

1. Feasibility study on highest and best use location.
2. Operations plan completed.
3. Architectural/engineering plans developed.
4. Construction.
5. C-store opening.

Goal 2: Pediatric Dentistry Center.

Objectives:

The CTCLUSI has existing expertise in offering dental services to its Tribal members and this existing skillset and experience can be translated into a specialized Pediatric Dentistry Center.

Performance Measures:

1. Market needs assessment and capability assessment.
2. Location analysis.
3. Operations plan/needs assessment.
4. Architecture/engineering plans developed.
5. Launch facility.

Goal 3: Digital Nomad Resource Centers.

Objectives:

Digital nomads are typically defined as people who conduct their life in a nomadic manner while engaging in remote work using digital telecommunications technology. Digital nomads



have no permanent place of residence but maintain high paying jobs mostly in the technology sector.

Because of CTCLUSI's geographic location – one of the most beautiful areas in the country – in addition to its outdoor recreation opportunities, and its tourism and entertainment infrastructure, it is uniquely positioned to cater to the digital nomad community. Creating a modern, well appointed, and welcoming space for digital nomads to conduct their business will increase revenue, attract a new customer base, and position CTCLUSI as an innovative and forward thinking destination for remote workers.

Performance Measures:

1. Completed customer discovery process report outlining market viability and facility needs.
2. Completed assessment of location.
3. Construction plans and schedule.
4. Completed facility.



Priority 4: Support Tribal Members Staying or Returning Home

VISION: Create, encourage, and support opportunities that allow any Tribal member who wants to live on CTCLUSI land the economic ability to do so.

Goal 1: Grow and expand local businesses.

Objectives:

Establish complimentary economic development programs aimed at supporting existing private Tribal member owned businesses. These programs will resemble classic business retention and expansion (BR&E) and economic gardening economic development programs. These will provide direct outreach to businesses allowing CTCLUSI to gain information about their operations, challenges, and needs. Economic gardening goes deeper by providing one-on-one consultative support to businesses helping them identify strategies for growth and resources to execute those strategies.

Performance Measures:

1. 10% growth in private business revenues over 3 years.
2. 2 business expansions over 3 years.
3. 15% increase in FTE employees over 3 years.

Goal 2: Training for virtual/remote positions.

Objectives:

Design training programs for remote work opportunities, enroll Tribal members in the training programs, and help place Tribal members in remote positions. This is not only a valuable program for Tribal members to live on Tribal lands but is another opportunity for CTCLUSI to attract outside money into the Tribes.

Performance Measures:

1. Outreach conducted to potential employers.
2. Two training programs designed (anticipate CAD and coding).
3. First cohorts of 10 people each after training launch.
4. 5 job placements after end of first cohort.



Goal 3: Support entrepreneurship.

Objectives:

Support the launch of new business starts and the creation of an ecosystem where Tribal members feel comfortable returning – or staying – home to start a business or transition hobby into a business. Small programs can be created to teach and encourage new ventures. Startup bootcamps can help introduce individuals to the prospect of launching their own business. Accelerator programs can also be created to help launch and grow ideas into viable businesses.

Performance Measures:

1. 10% increase in new business starts after 3 years.
2. Participants in bootcamps and accelerators over 30 years.

Goal 4: Provide Tribal members with job-specific training to fill vacancies in identified sectors.

Objectives:

There are high job vacancy rates in the region. Vacancies are mostly in the healthcare industry. This presents a strong opportunity for CTCLUSI to train and place Tribal members in these positions.

Performance Measures:

1. 20% decrease in job vacancies for the region (especially in healthcare) 2 years after program launch.
2. 80% placement of Tribal members in needed positions after program completion.



Action Plan and Implementation

Priority	Project	Timeline	Implementation
Revitalize Blue Earth Federal Corporation as the Primary Economic Development Entity	Revitalize Blue Earth Federal Corporation	6 months	Consult with Tribal Council to empower an economic development entity to manage projects and implement plans
	Maximize 8(a) certification	6 months	Retain/recruit in-house 8(a) certification expertise within Blue Earth Technology
	Define Tribal economy vision to determine future economic governance structure needs and desires	6-12 months	Refinement of CTCLUSI future governance structure tied to the Tribes' economic vision (<i>such as transitioning to a Section 17 Corporation</i>)
Grow Current Opportunities	Hire Additional Forestry Staff	6 months	Recruit and hire forester, GIS administrator, and administrative assistant/log scale accountant to support the forestry management program
	Patient assessments	6 months	Conduct assessments with patients of the healthcare system to determine what assistance that are eligible to receive
	Golf course design plan	6 months	Conduct planning to determine the best positions of the holes on the course to better align with the casino complex
	Build out plan to reconfigure golf course	1 year	Complete construction on golf course to reconfigure layout/hole placement
	Create real estate fund with investment criteria	1 year	In-house or consultant development of an investment outlook and criteria for a real estate investment fund
	Conduct RV park feasibility study	1 year	Determine best location for RV park based on anticipated visitors, tourist/visitor value, proximity to other attractions, and cost
	Construct RV park	1-2 years	Complete build out of RV Park



Economic Diversification	Digital nomad resource center customer discovery	6 months	Engage people involved in this lifestyle, interview them, and determine market viability or project and what pivots are necessary
	C-store feasibility study	1 year	Conduct a feasibility study on placement, operations, and revenue & expense projections for a c-store
	Dental practice expansion assessment	6 months	Conduct a feasibility snapshot to further determine demand and opportunity
	Pediatric dentistry market assessment	1 year	Review the market potential and opportunity for a pediatric dentistry office
	Construct digital nomad resource center	1 to 2 years	After determining market viability plan for construction of the space
	Program and market digital nomad resource center	1 to 3 years	Based on user feedback develop programs, amenities, and resource offerings
Support Tribal Members Staying or Returning Home	Start entrepreneur bootcamp	6 months	Design curriculum, promote program, hold event, gather feedback and next steps from participants
	Interview remote work employers to judge needs	6 months	Identify companies hiring remote workers to determine needs that can influence training programs
	Launch BR&E program for private tribal member owned businesses	1 year to 5 years	Design survey instrument, identify businesses, conduct interviews, track responses, provide support
	Launch economic gardening program	1 year to 5 years	Identify businesses capable of expansion, provide data and other analysis to assist in that expansion
	Launch accelerator	1 year	Design/purchase curriculum, find advisers, run program
	Launch remote worker training programs	2 to 5 years	In-house or consultant led creation of training programs aimed at placing participants in a remote work opportunity
	Develop training programs for current local vacancies	1 to 5 years	In-house or consultant led creation of training programs aimed at placing participants locally in positions that have high vacancy levels



Resilience

CTCLUSI understands the importance of building capacity for economic resilience so that Tribal members can withstand and recover from economic shocks and other unforeseen disasters. Resilience is not only woven into the priorities and goals of this document, but is a foundational attribute of the Tribal culture and identity.

While developing this CEDS, the Tribes were purposeful in the inclusion of both steady-state and responsive initiatives:

Steady-State: long-term efforts aimed at CTCLUSI's ability to withstand a significant shock or avoid one altogether.

- **Economic Diversification:** CEDS Priority 3 outlines a number of goals and objectives dedicated to diversifying the Tribal economy.
- **Economic Development:** CTCLUSI will implement business retention and expansion initiatives. Both will include post disaster support resources and targeted programming.
- **Workforce:** CEDS Priority 4 concentrates on providing employment and entrepreneurship opportunities to Tribal members on Tribal lands. These efforts aim to produce a resilient workforce engaged in a resilient Tribal economy.

Responsive: strategies to meet Tribal needs following a disaster.

- **Communication & Information Networks:** CEDS Priority 1 deals with developing CTCLUSI's primary economic development entity. A core role for this entity is the creation and maintenance of resource networks that can be activated during a post disaster recovery period.
- Every priority identified in this CEDS contains goals and objectives aimed at increasing communication among Tribal departments, initiatives, and programs, and with outside entities.

CTCLUSI's unique history is testament to its capability to remain resilient in the face of disaster. The Tribes' culture, customs, ties to the land, and bond with Tribal members have seen the Nation through disasters in the past. And, they will continue to sustain the Tribes for many generations to come.



Evaluating Future Economic Opportunities

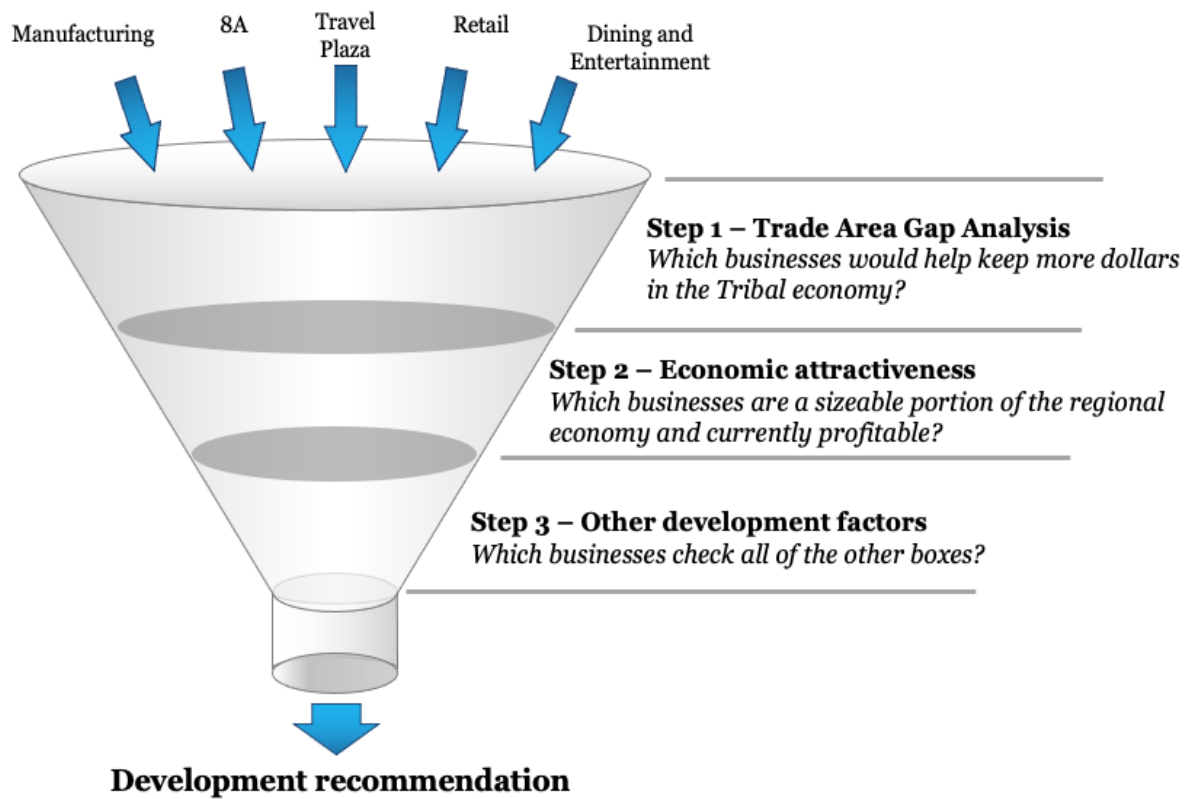
Implementing a structure for decision making and evaluating opportunity to act more expediently when opportunity arises.

Potential Due Diligence Process

For future planning and implementation of economic opportunities, it will be important for CTCLUSI to determine the type of criteria to be utilized in identifying which business opportunities will best meet the Tribes' long-term vision and goals and keep more dollars circulating within the Tribal economy; below is an example of potentially critical areas of consideration to initiate the evaluation process.



In utilizing the pre-determined assessment criteria, the following graphic represents a three-step path to filtering and prioritizing the types of businesses and/or industries that may be the best fit for the Tribes.



It is recommended all new business opportunities flow through this funnel to support successful implementation of economic initiatives.



Conclusion

The Priorities outlined in this plan include performance measures designed to judge the efficacy of the implementation efforts. In addition to these performance measures, CTCLUSI will also review the following metrics to gauge a successful execution of the plan:

- Number of jobs created for and filled by CTCLUSI members,
- Increase in economic base dollars flowing into the Tribes,
- Return on Investment realized by Tribal initiatives targeted by this plan,
- Significant changes in the economic environment and opportunities present for all Tribal members, and
- Increase in Tribal members staying on or returning to Tribal lands.

The Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians is committed to the execution of priorities and implementation of action items contained in this Comprehensive Economic Development Strategy.