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 POLICY & GROWTH BREAKOUT

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Health Plan

BEND  
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# IMPACT CONFERENCE

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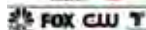
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 **POLICY & GROWTH BREAKOUT**

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**JOSH  
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Senior Economist,  
State of Oregon



**SARA  
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Director of  
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Bend Chamber

# Scenic Areas, Wealth, and Industrial Structure



**DAS**  
DEPARTMENT OF  
ADMINISTRATIVE  
SERVICES

October 31<sup>st</sup>, 2023

# The Wealth Economy

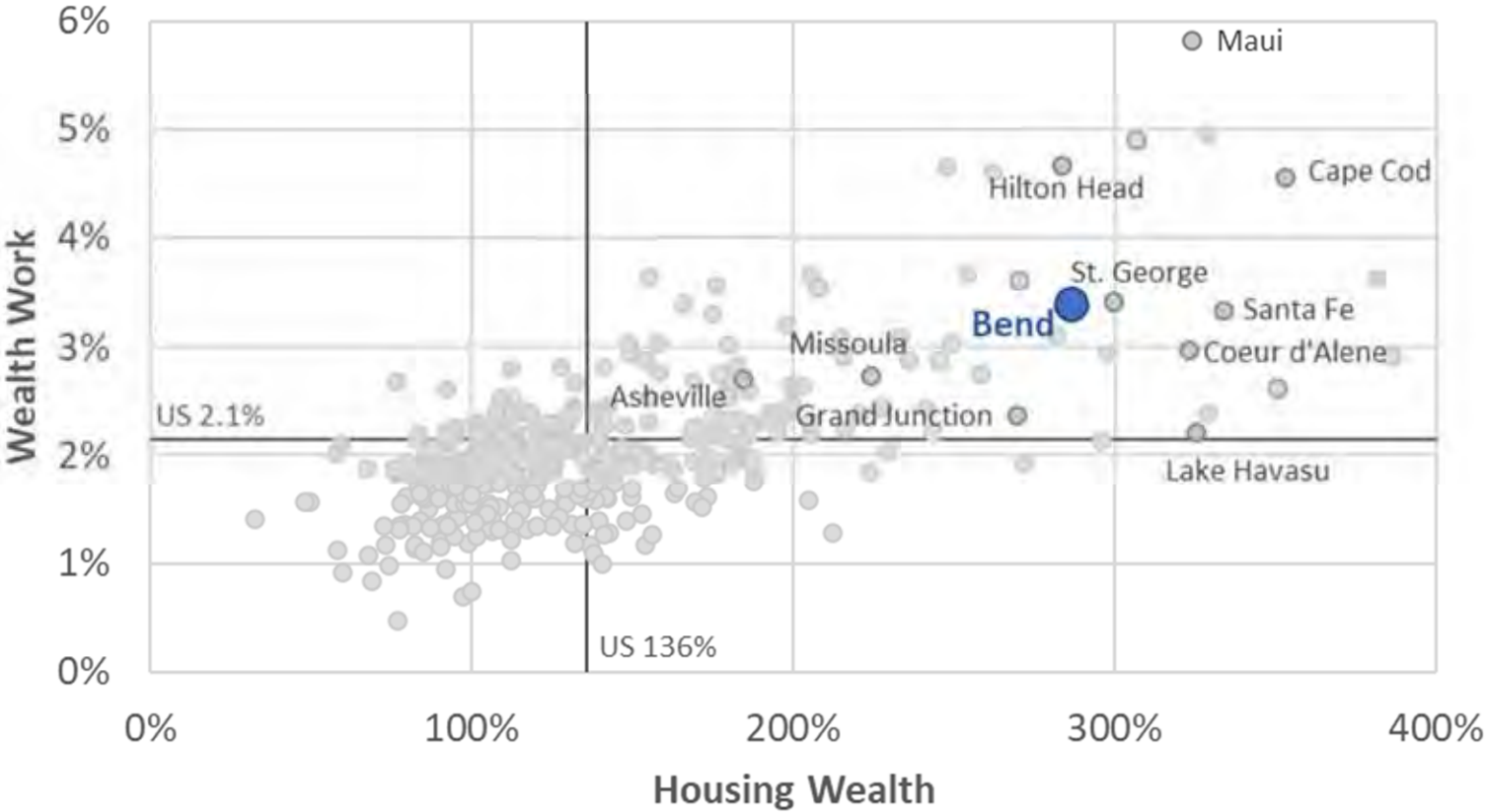
*Comparing U.S. metro areas by owner-occupied housing values as a share of local GDP and wealth work jobs as a share of all jobs*



Data: Housing Wealth 2021, Wealth Work 2022 | Source: BEA, BLS, Brookings, Census, Oregon Office of Economic Analysis

# Scenic areas and the wealth economy

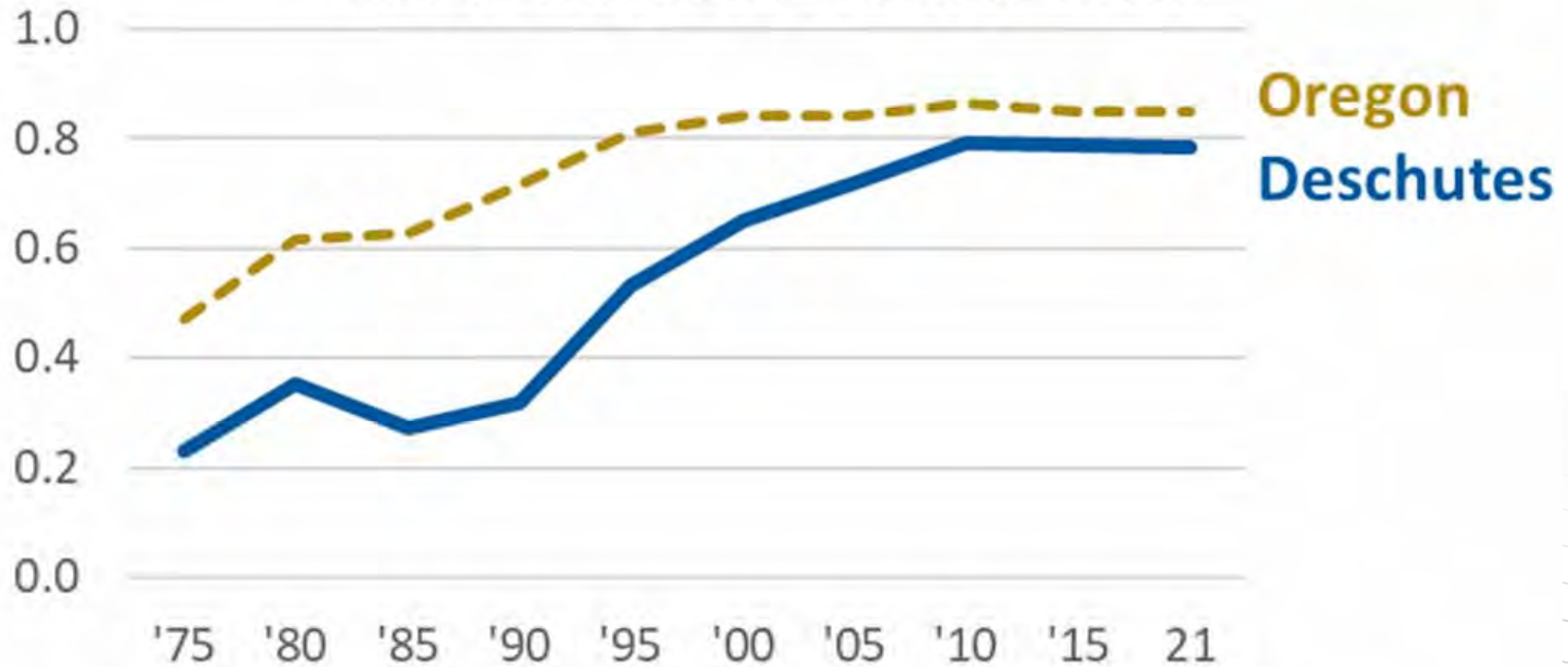
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# Central Oregon is Diversifying

Industrial Structure Relative to U.S.



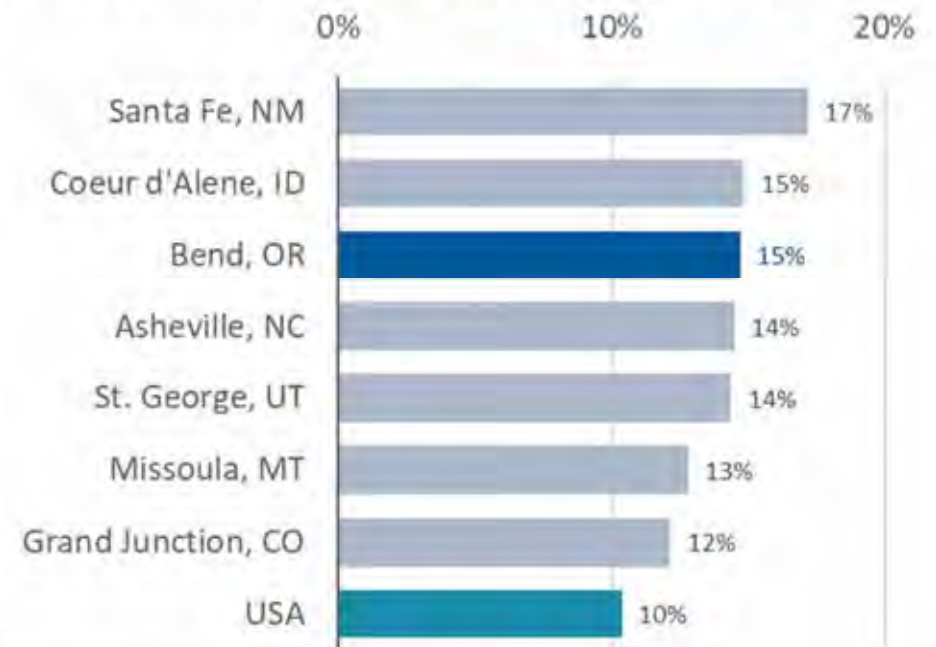
Data: QCEW 1975-85 SIC, 1990-2021 NAICS | Source: BLS, Oregon Office of Economic Analysis





## Scenic Areas Do Rely on Tourism

Share of all local jobs that are in Leisure and Hospitality

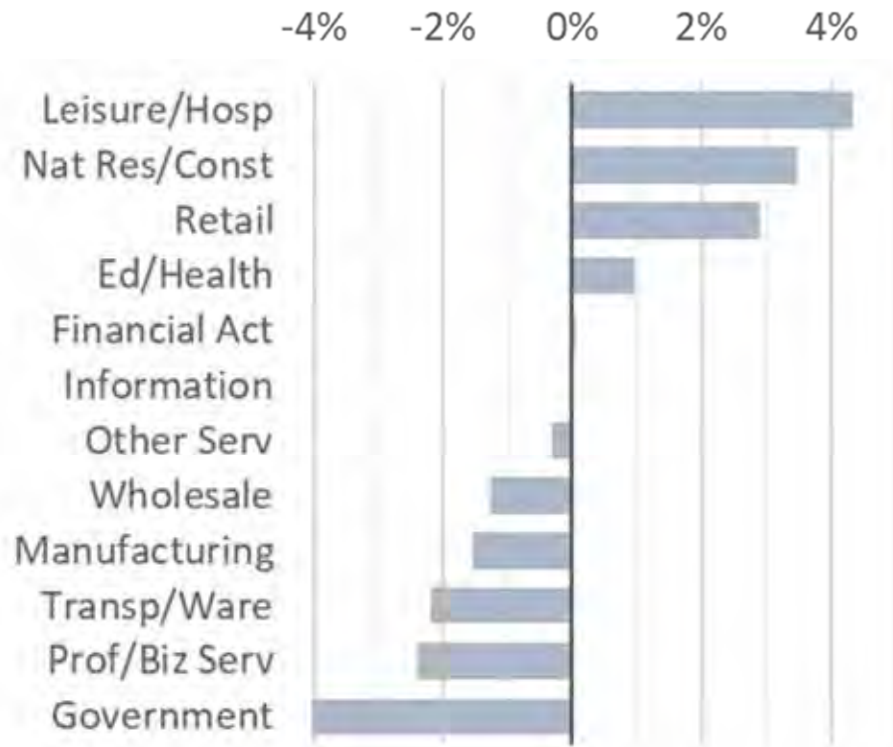


Data: 2022 | Source: BLS, Oregon Office of Economic Analysis

# Bend MSA's Industrial Structure

*Difference in employment shares by industry, 2022*

*Compared to the U.S.*

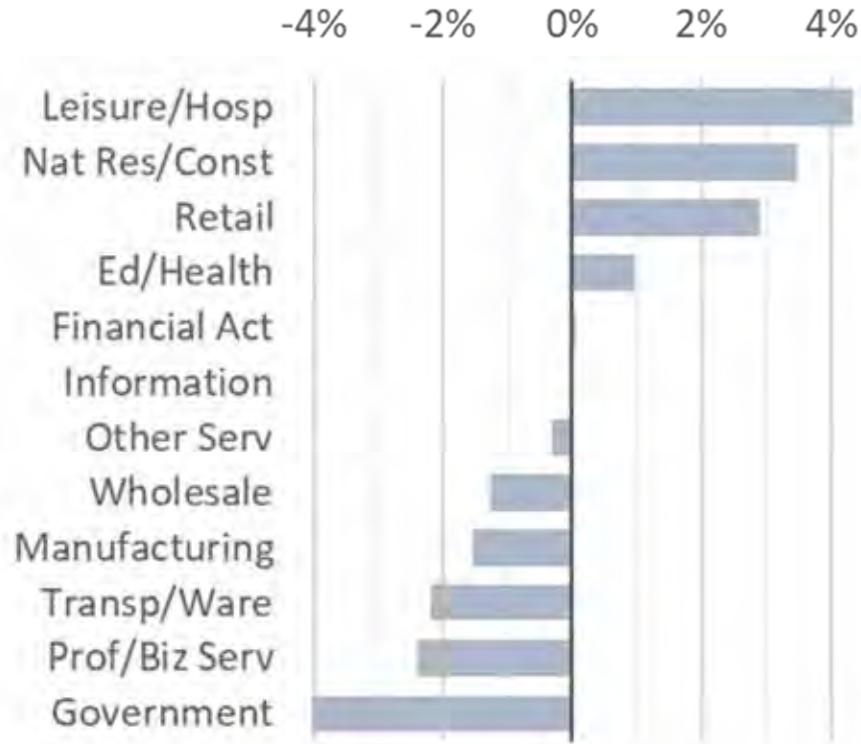


Source: BLS, Oregon Office of Economic Analysis

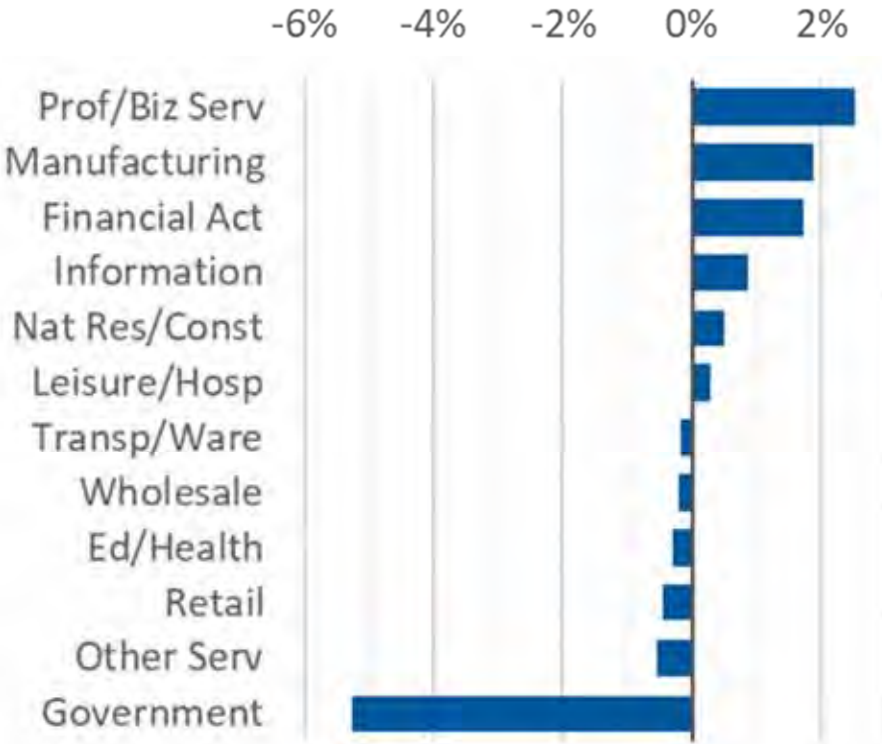
# Bend MSA's Industrial Structure

*Difference in employment shares by industry, 2022*

*Compared to the U.S.*



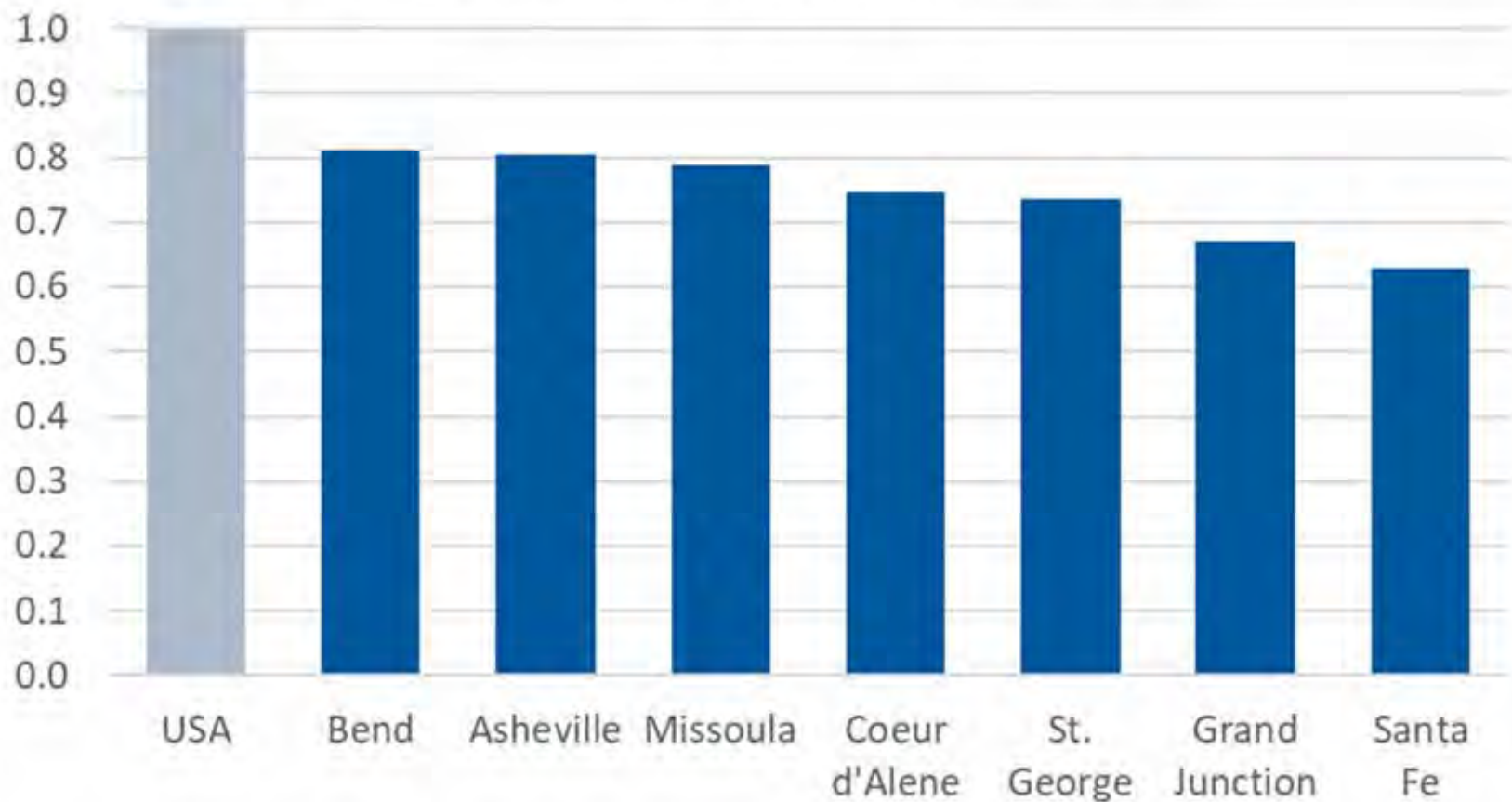
*Compared to other scenic areas*



Source: BLS, Oregon Office of Economic Analysis

# Scenic Areas' Industrial Structure

*Comparing local industry composition to the U.S., 2022*

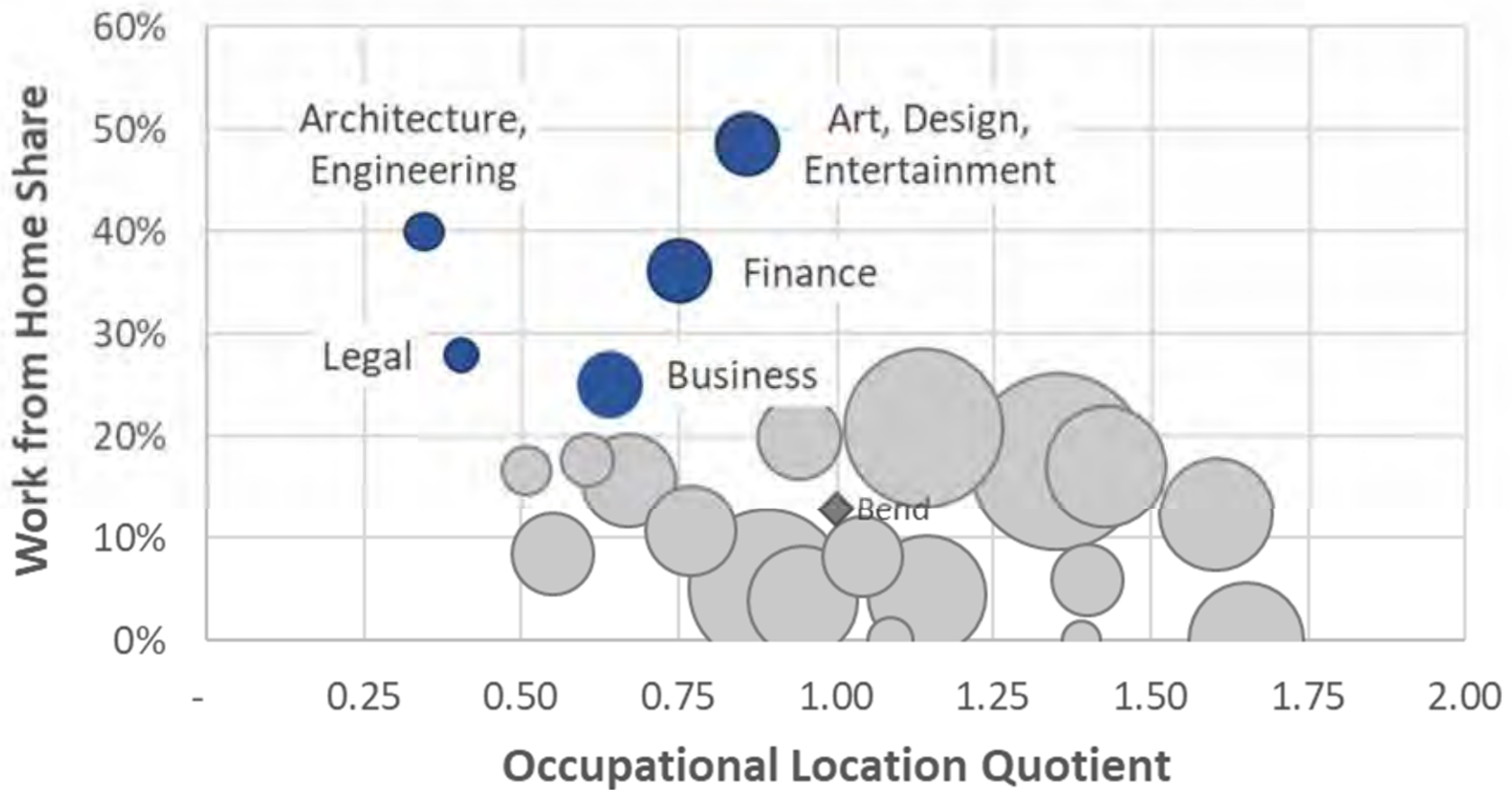


Source: BLS, Oregon Office of Economic Analysis



# Working from Home Diversifies the Bend Economy

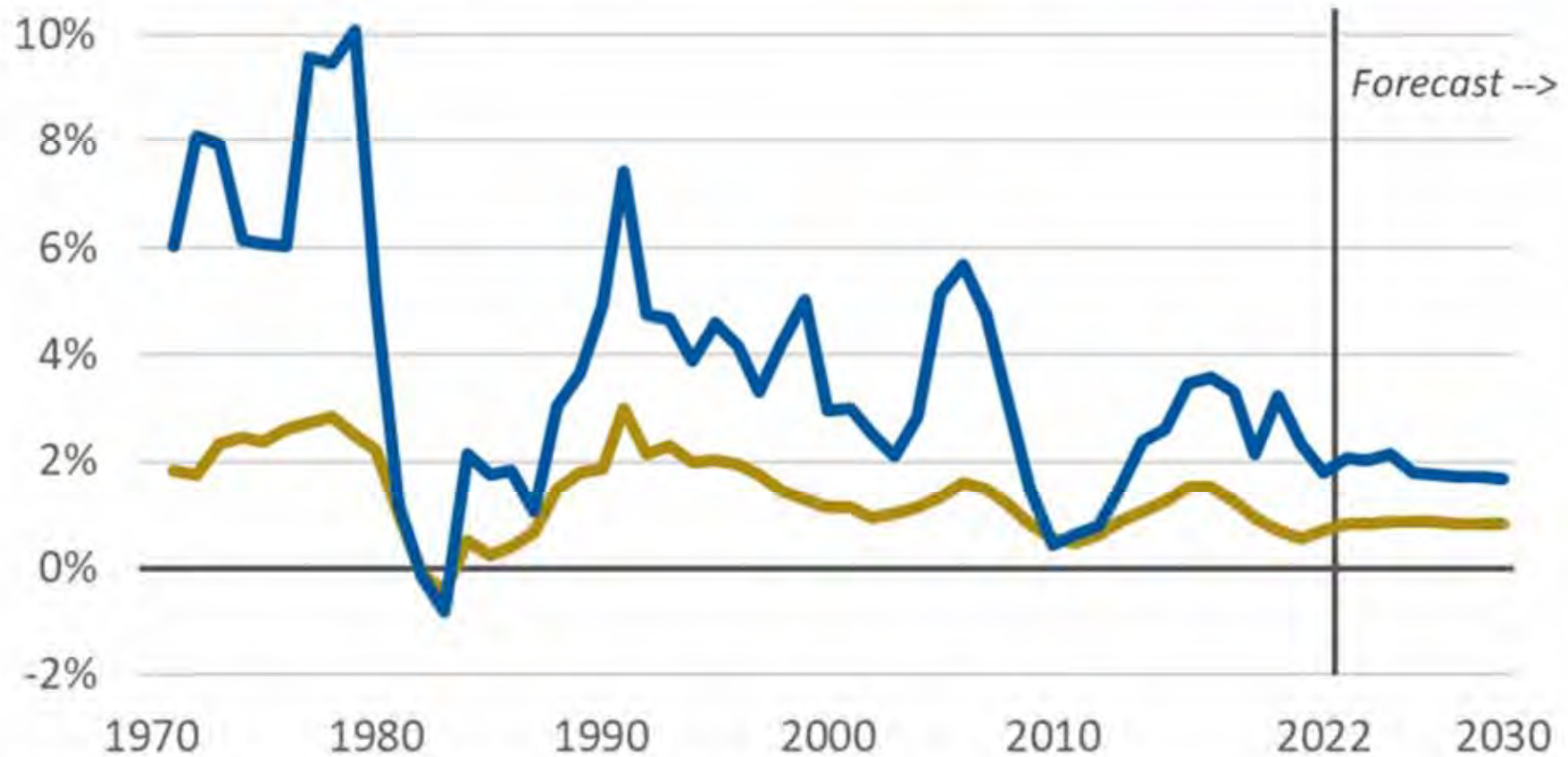
*Largest WFH shares in occupations with low levels of local payroll employment*



Data: 2017 ACS | Source: IPUMS-USA, Oregon Office of Economic Analysis

# Bend MSA's Growth Among Nation's Fastest

Annual percent change in population in **Oregon** and **Deschutes County**

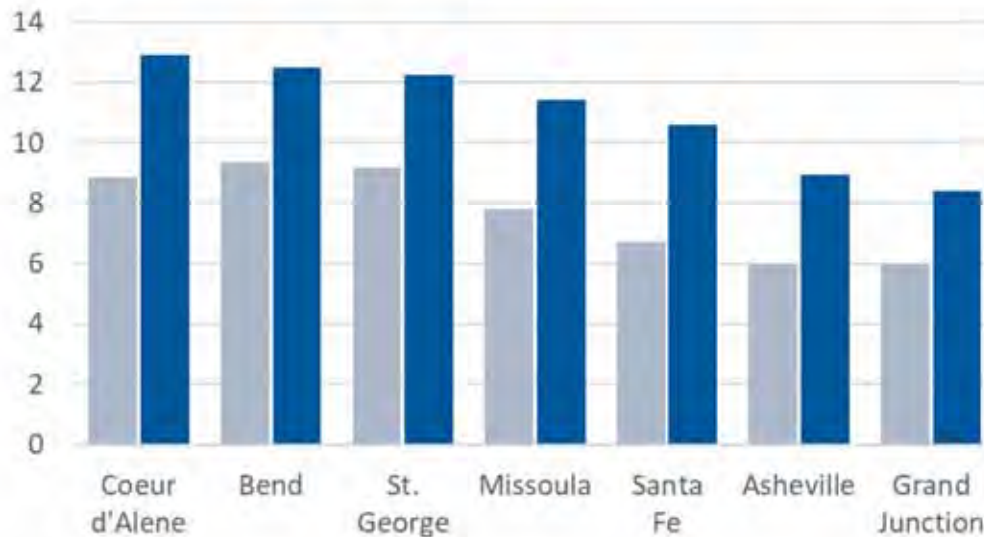


Source: Census, Portland State Population Research Center, Oregon Office of Economic Analysis

# Scenic Areas and Housing Affordability

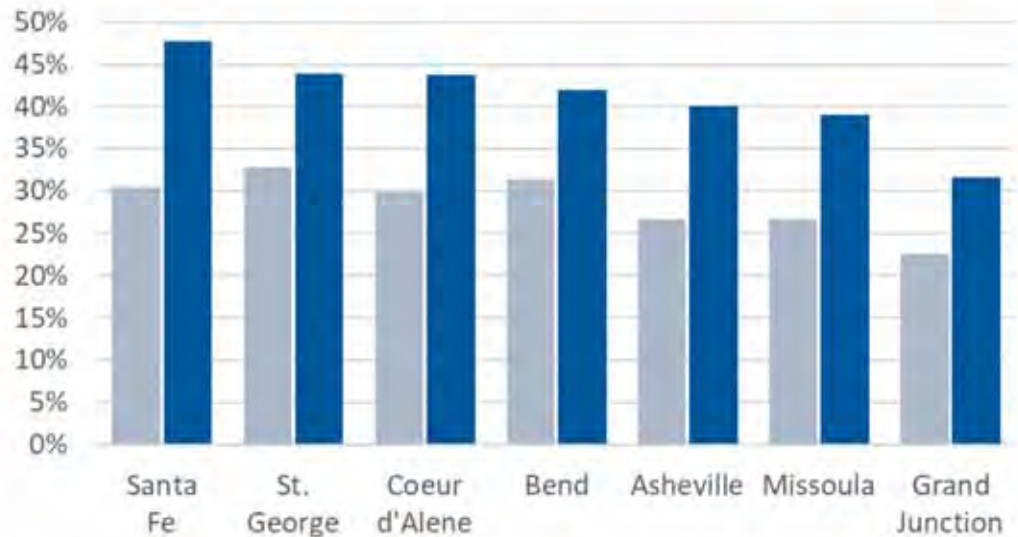
## Homeownership Affordability

Home value to wage ratio for All Occupations and Wealth Work



## Rental Affordability

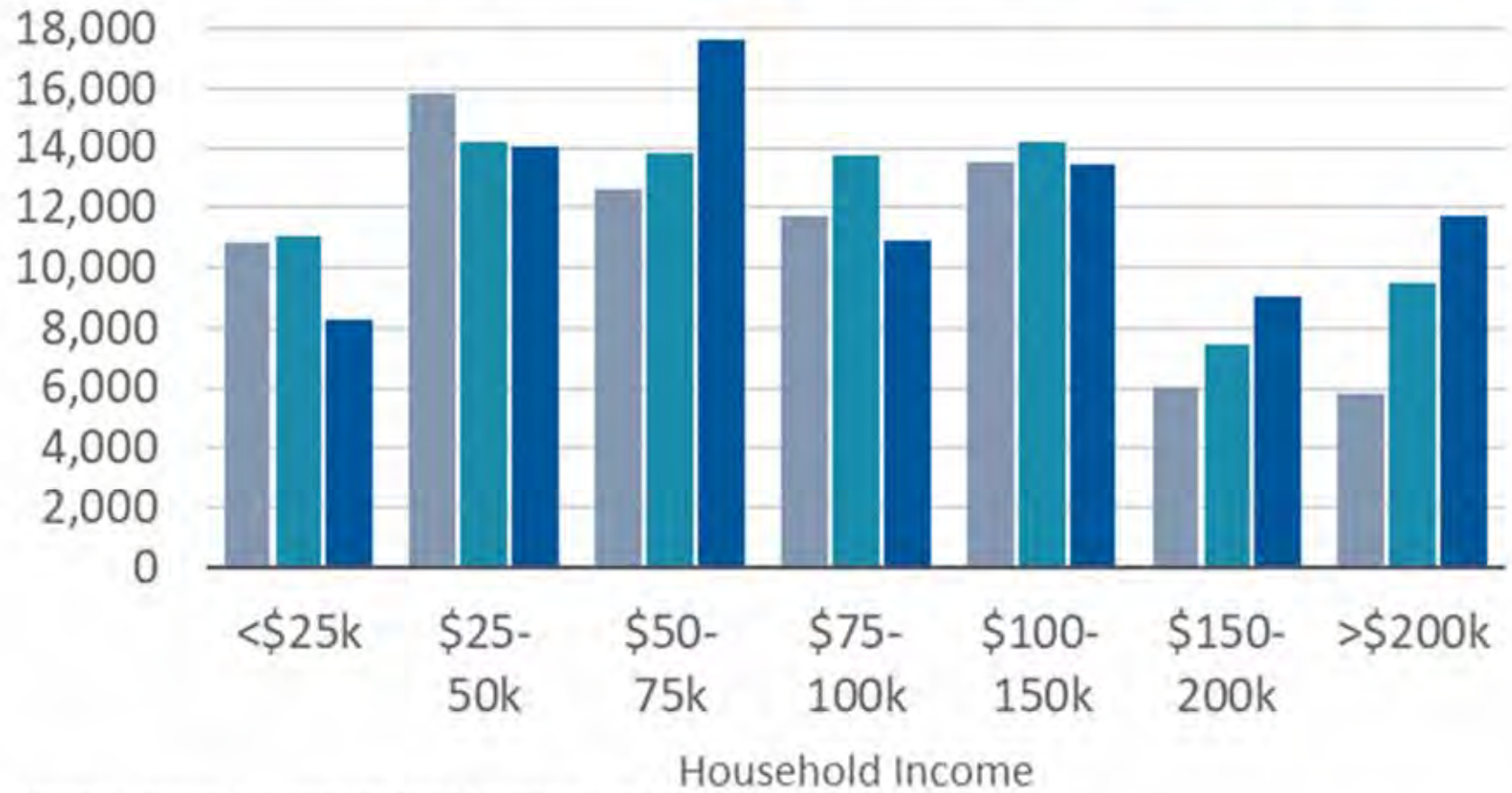
Avg rent as share of wages for All Occupations and Wealth Work



Wealth work average wage excludes personal financial advisors | Data: Wages 2022, Rent 2021 | Source: BLS, Census, Oregon Office of Economic Analysis

# Bend Households by Income

No. of Deschutes County households by income in 2019, 2021, 2022

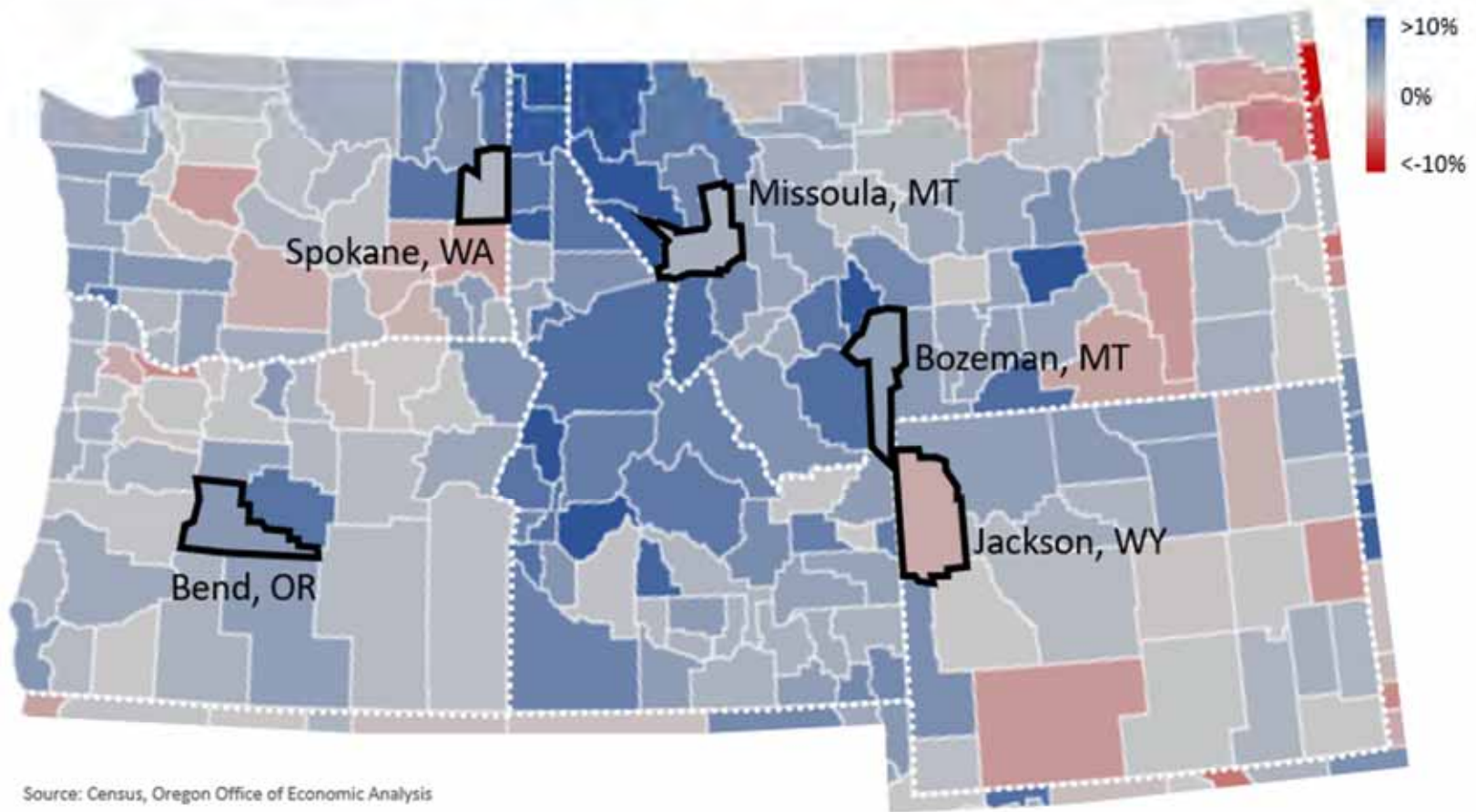


Source: Census, Oregon Office of Economic Analysis



# Zoom Towns' Cascading Migration

*Domestic migration rate, 2020 to 2022*



# Contact Information

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[joshua.lehner@das.oregon.gov](mailto:joshua.lehner@das.oregon.gov)

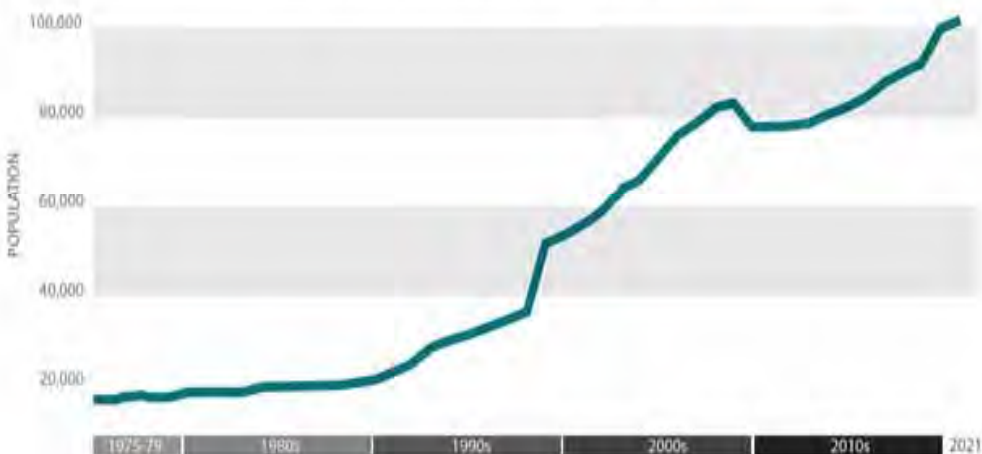
[www.OregonEconomicAnalysis.com](http://www.OregonEconomicAnalysis.com)

[@lehnerjw](#)

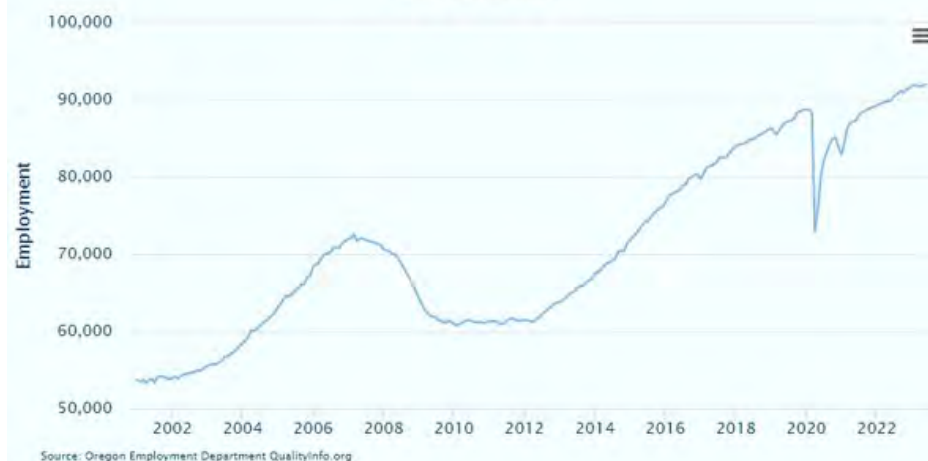


# Bend's residents and employees growing

BEND POPULATION 1975-2021

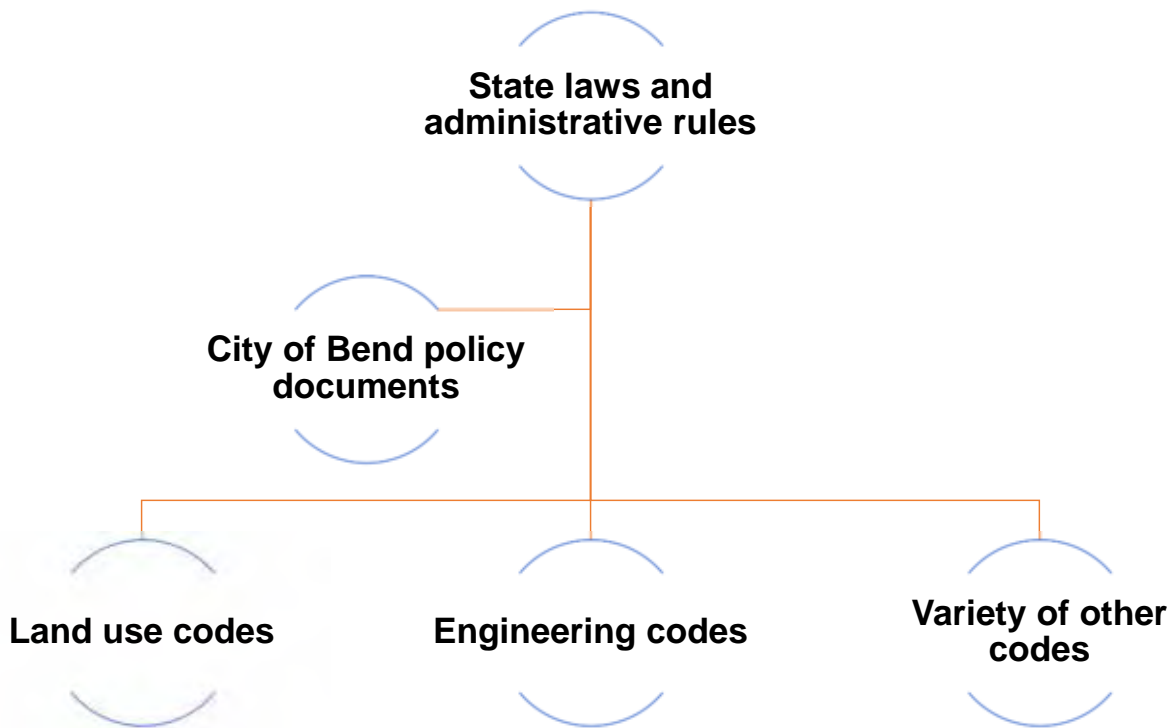


Bend-Redmond, OR MSA  
Total nonfarm employment  
(seasonally adjusted)  
Official Oregon Series



- Bend by 2045:
  - 44,000+ new residents
  - 25,000 additional dwelling units
  - Employees growing at similar rates
- Bend's City "footprint" has grown sixfold since 1975: 3,863 to 22,230 acres

# How is Oregon managing growth?



- Oregon planning in a nutshell:
  - Statewide planning goals, laws, rules for cities
  - Mandates planning for growth
  - Compact communities in Urban Growth Boundaries
  - Transportation options
  - Adequate supplies of housing and employment lands
  - Involve the public in the planning process
  - Preserve unique historical and natural resources
  - Save farm and forest land



# What is changing at the state level?

Climate Friendly Equitable Communities rules:

**Climate Friendly Areas (CFA):** places where community members can live, work, and meet most daily needs without having to drive a vehicle

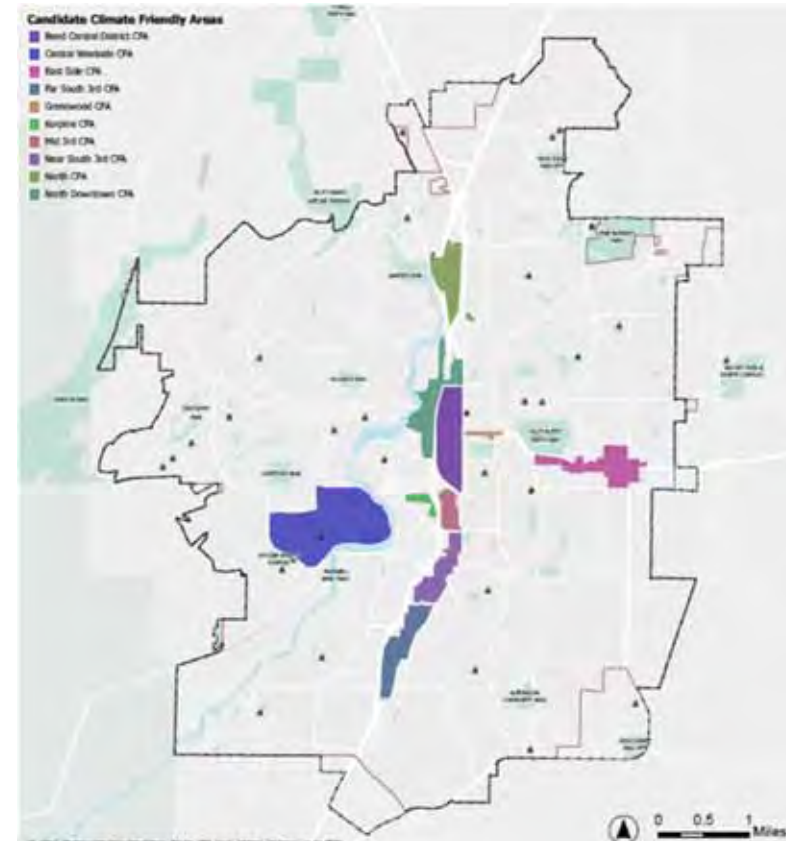
A land use designation of 275-350 acres or more to accommodate 30% of existing and needed housing

Located to avoid gentrification and displacement

Community engagement centers the voices of underserved populations

A tool to decrease per capita vehicle miles traveled

Location impacts future planning and



CITY OF BEND

# What is changing at the state level?

Oregon Housing Needs Analysis (OHNA) from HB 2001:

Dept of Administrative Services will conduct first statewide housing needs analysis by January 1, 2025

What OHNA will produce for cities:

Housing unit projection (20 years)

Current housing underproduction

Units for houseless population

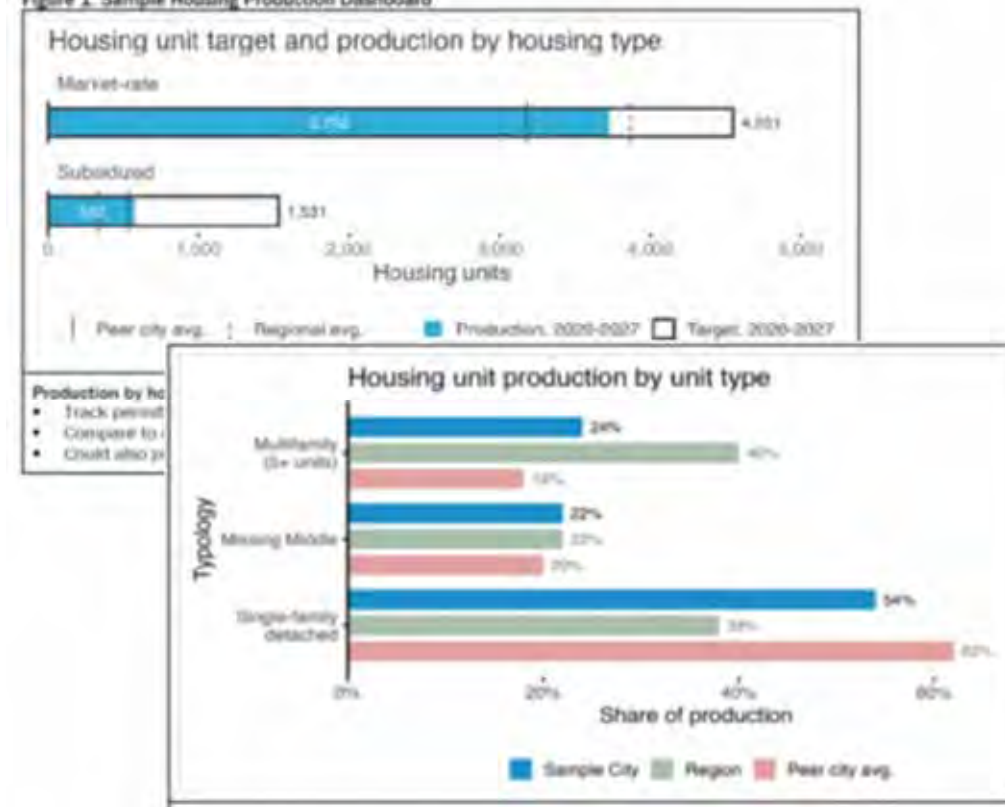
Vacation homes or second homes

Housing by type and income levels

Housing production targets

Other new laws making changes for middle housing, parking regulation, and more with more to come

Figure 1. Sample Housing Production Dashboard



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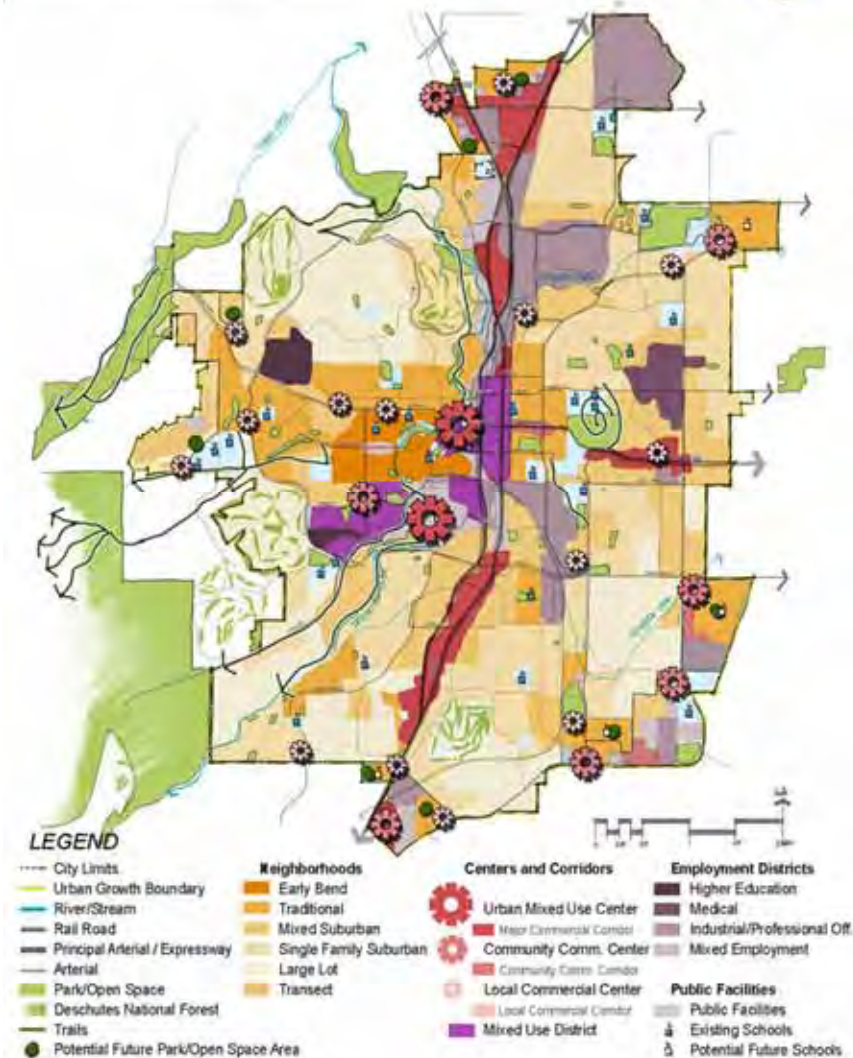
# Bend's Growth Framework

Bend's growth plans in a nutshell:

- Bend's 2016 Comprehensive Plan establishes a clear policy vision to 2028
- "Complete communities", grow up and out
- Investing in all transportation systems, focus on bike and pedestrian
- Wastewater conveyance via gravity systems
- Water supply sufficient for now, conservation is increasingly important
- Increasing infill and redevelopment for housing
- Expanding the Urban Growth Boundary (UGB)
- Focusing on housing production, affordability
- Supporting economic development with land, infrastructure, flexible employment zones
- Updating plans every 5-8 years

## BEND FUTURE URBAN FORM DIAGRAM

This diagram is conceptual, non-regulatory, and subject to change.





# City Council goals direct staff priorities



Advisory committees, boards and commissions all help elected officials make policy decisions.

Community members can apply to be volunteers on these advisory groups and are appointed by City Council.

**City Manager Appointed:**  
Accessibility Advisory Committee

**Police Chief Appointed:**  
Police Chief's Advisory Council

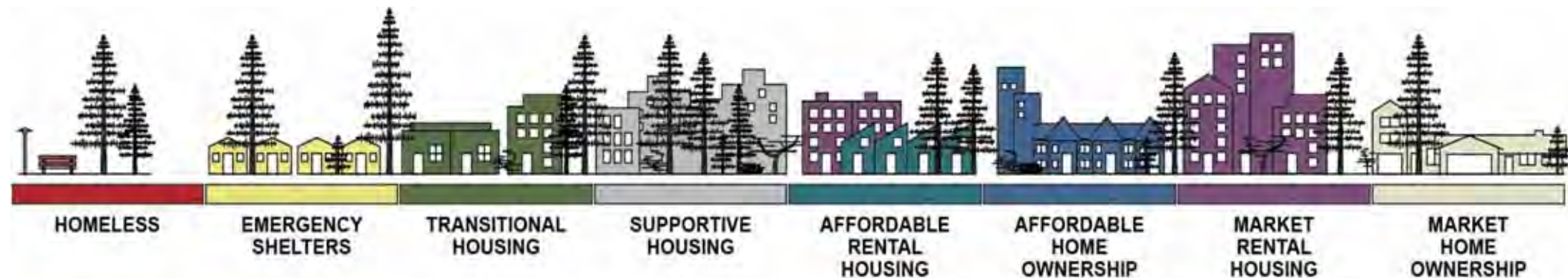




# Resourcing mostly for core services



# Council's focus on the housing continuum



- Bend's median home value is about 250% of Bend's Area Median Income
- City's Housing Department and city focusing on the housing continuum:
  - Reducing regulatory barriers for affordable and middle housing types
  - SDC exemptions, tax exemptions, using Affordable Housing Fee and Commercial and Industrial Construction Tax (1/3 of 1% on development)
  - Use the funds to leverage State and Federal funding for affordable housing
- Approximately 1,000 affordable deed restricted units, 700 in near term pipeline

# Council's focus on transportation system

2020 GO Bond Projects (\$190M):

29 Projects and Programs:

East-West Connections

North-South Connections

Intersection Improvements

12 Key Routes – Bike/Ped

Support for Transit Hubs

Parkway Connections - ODOT

Citywide Safety Improvements

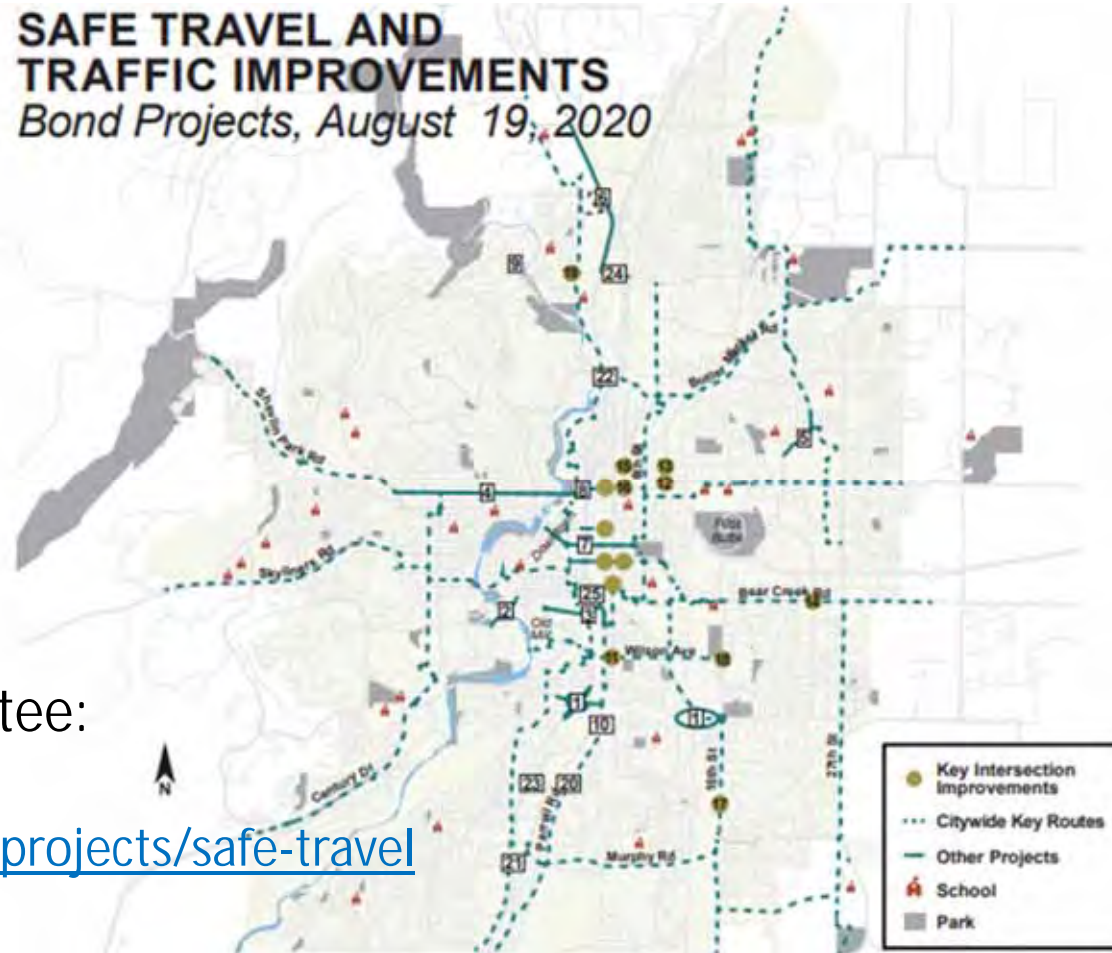
ITS Improvements

Transportation Bond Oversight Committee:

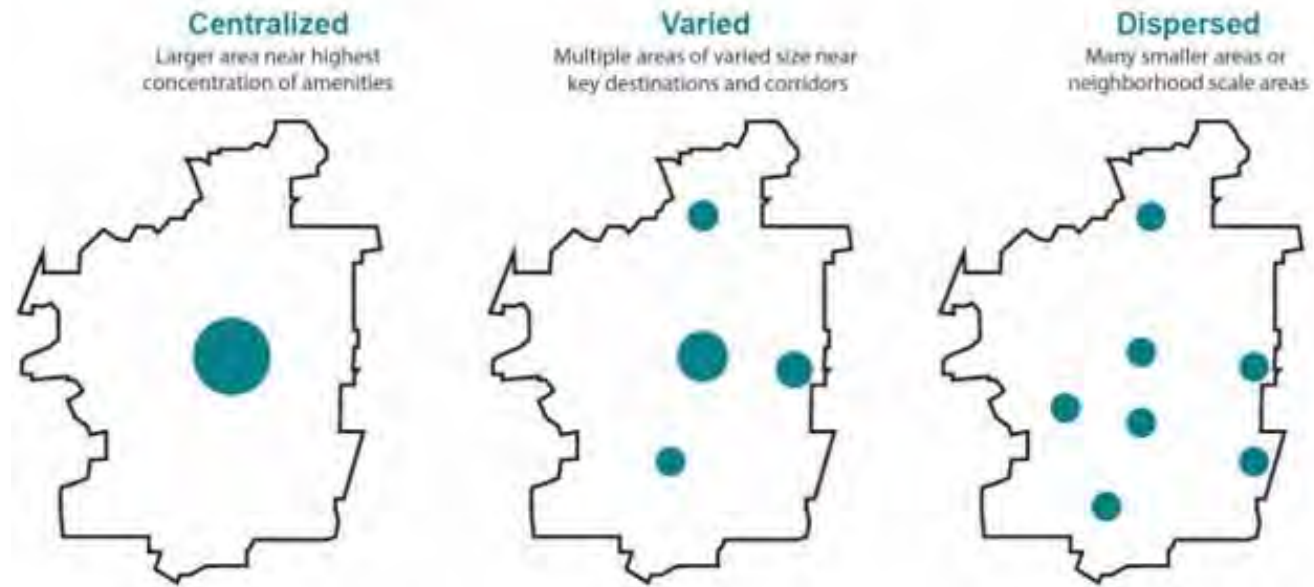
Prioritize Key Route Projects

Project dashboard: [bendoregon.gov/city-projects/safe-travel](https://bendoregon.gov/city-projects/safe-travel)

## SAFE TRAVEL AND TRAFFIC IMPROVEMENTS *Bond Projects, August 19, 2020*



# Strategies for climate and growth (CFAs)



- Study will identify the pros and cons of CFA candidates
- Subjective as opposed to formal ranking based on data and analysis
- Scenarios:
  - A combination of CFA candidate areas and linked corridors
  - A combination of different CFA types, including different heights and densities
  - Could be centralized, varied or dispersed



# Strategies for the core areas of Bend



*Illustrative example of pedestrian bridge, not actual design*

- 2020 - Core Area Plan (CAP) adopted
- 2021 - 637-acre Urban Renewal District (URA) established, \$195M max. indebtedness
- 2023 - \$25M federal grant for pedestrian bridge linking downtown and the Bend Central core area
- Over 2,100 new mixed-use units permitted in the larger core area with office, retail, hospitality



# Strategies for new housing in 2023

Stevens Road Tract 261-acre UGB expansion:

- UGB expansion by end of 2023
- Adopting Planning Amendments
- Approx. 2,400 housing units, 700 affordable to 80% or less of Area Median Income (AMI)

## LAND USE CONCEPT ALTERNATIVE 3

- High Density Residential (RH)
- Medium Density Residential (RM)
- Standard Density Residential (RS)
- Regulated Affordable Housing
- Commercial (C)
- Mixed Employment (ME)
- Parks
- Conceptual Trails

### Notes

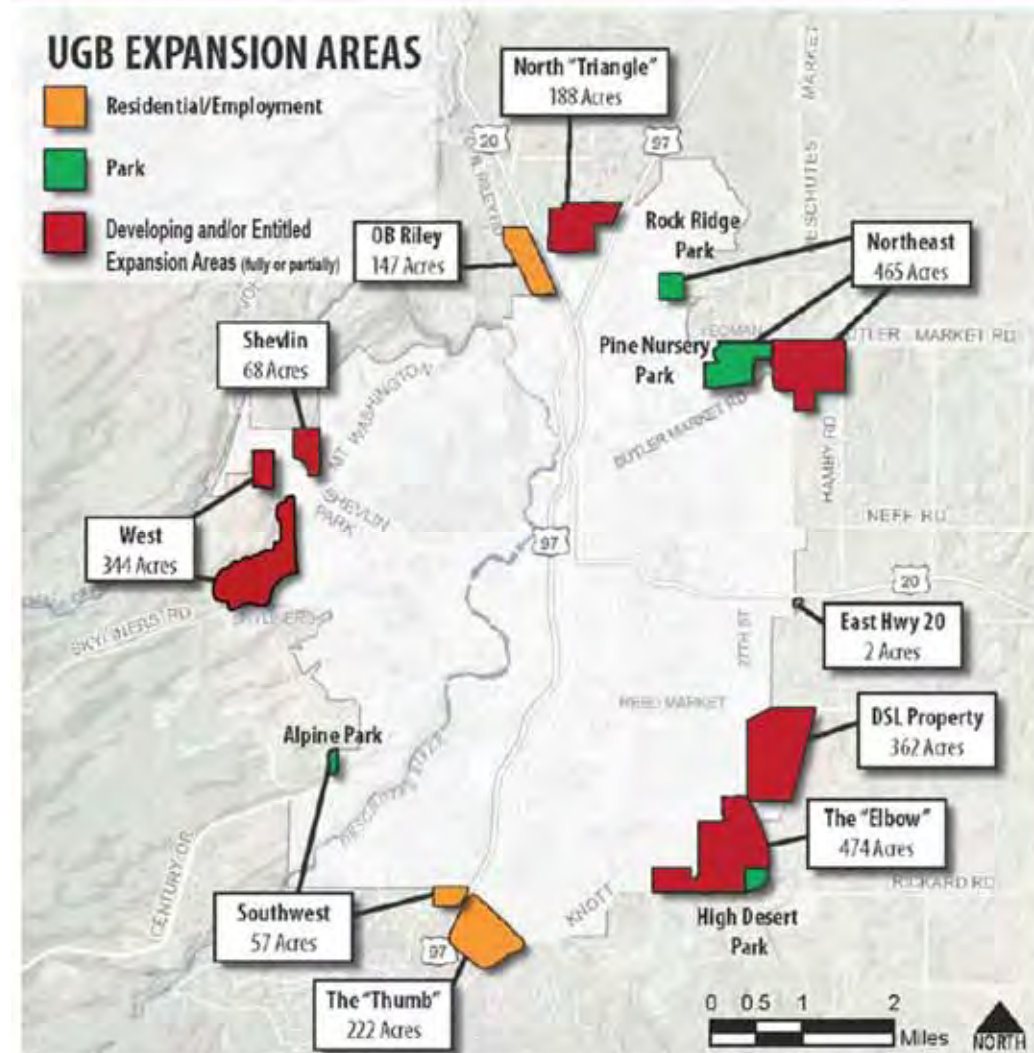
1. All land uses and locations are preliminary and conceptual.
2. Streets are illustrative and represent a framework – not all streets are shown.
3. The concept plan is subject to future Comprehensive Plan policy and master plan implementation.





# Housing strategies in expansion areas

- 7 of the 10 expansion areas, 5,000+ units have been partially or fully entitled since 2016
- Approx. 700 units have been built/building permit issued
- Years of housing in the pipeline:
  - Housing mix shifting, middle housing increasing, complete communities forming
- From UGB expansion to move-in-ready unit, it takes years:
  - But once annexed with planning approvals it provides housing relatively fast and consistently



# Potential UGB expansion for housing 2045



**HOUSING MIX**  
By Unit Type and Share

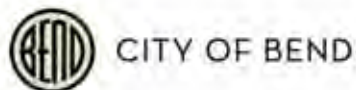
Unit Type	700 ACRES	550 ACRES	240 ACRES
Single Unit Detached	55%	50%	40%
Middle Housing	15%	20%	20%
Multi-Unit Housing	30%	30%	40%



# Shaping growth in the years to come

## Affordable Housing, Sustainable Development Actions:

- Plan for growth aligned with CFEC, sufficient land supply, complete neighborhoods
- Shaping state efforts on housing
- Leveraging Juniper Ridge
- Invest in the Core
- Economic development strategic plan, land needs analysis
- Revenue, code, policy options to increase shelters, transitional, affordable and middle-income housing



## Accessible and Effective Government Actions:

- Innovative engagement
- Information sharing between boards and City Council

## Environment and Climate Actions:

- New policies to support sustainable development

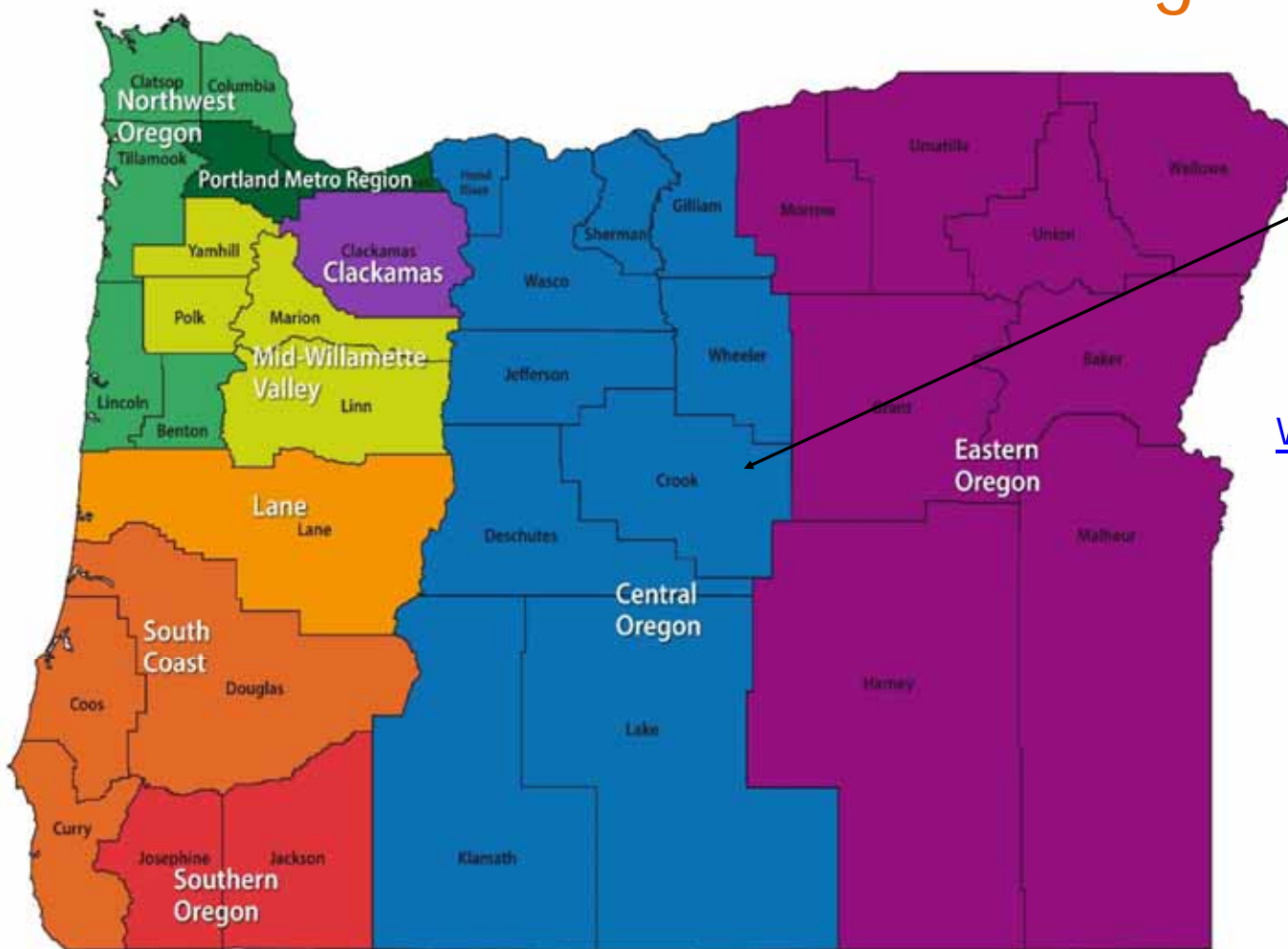
## Transportation and Infrastructure Actions:

- Implement transportation programs and mobility initiatives
- Master planning for sewer collection and stormwater systems



[eastcascadesworks.org](http://eastcascadesworks.org)

# Local Workforce Regions



East Cascades

[www.eastcascadesworks.org](http://www.eastcascadesworks.org)



## Central Oregon – Population Growth

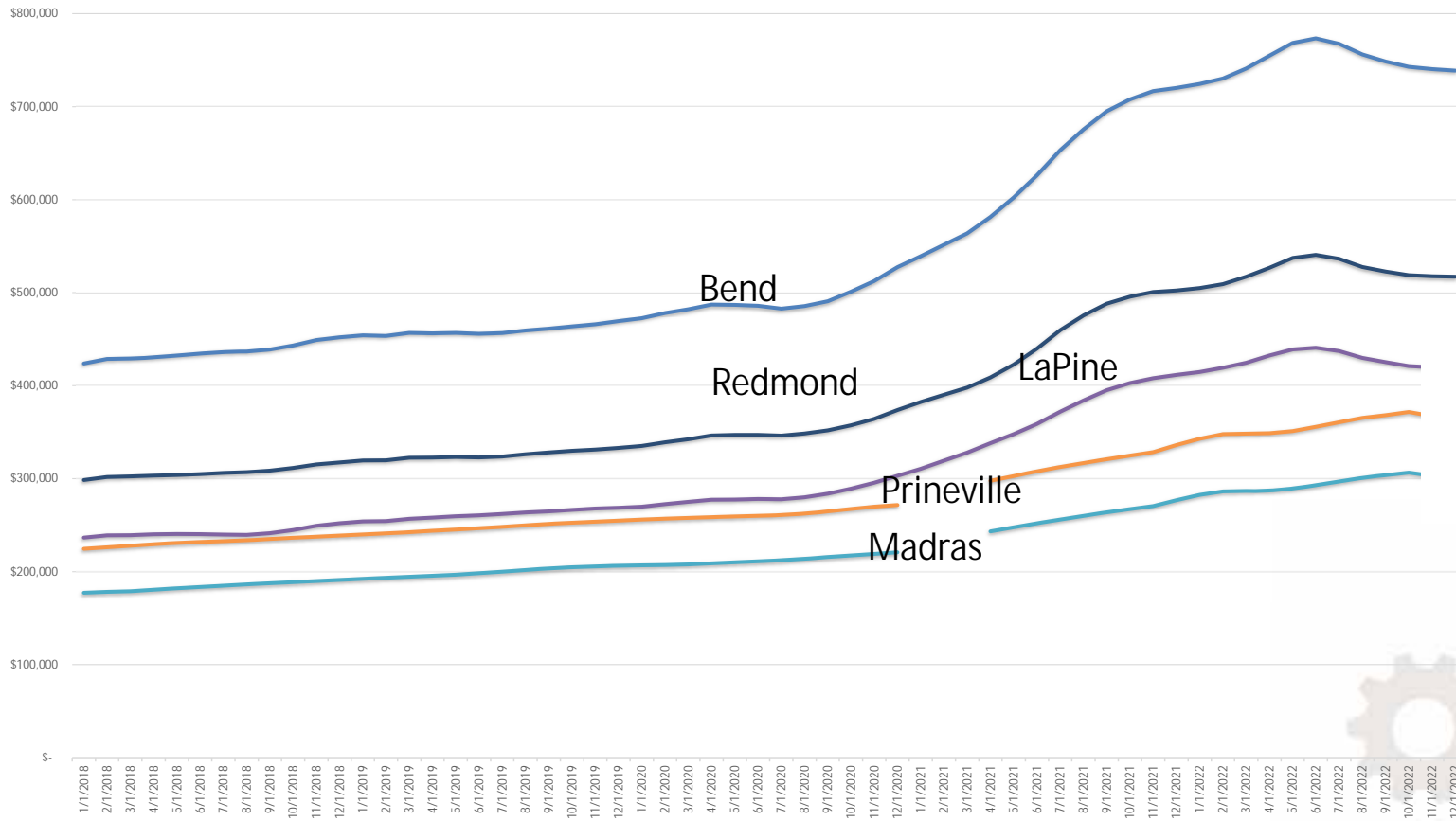
<b>East Cascades Population Growth</b>					
	2010	2020	2022	2010-2020 Annual Growth Rate	2020-2022 Annual Growth Rate
Oregon	3,831,074	4,243,791	4,278,910	1.0%	0.4%
East Cascades	327,342	382,267	394,354	1.6%	1.6%
Central OR	200,431	248,678	259,126	2.2%	2.1%
Deschutes	157,733	199,259	207,561	2.4%	2.1%
Jefferson	21,720	24,553	25,404	1.2%	1.7%
Crook	20,978	24,866	26,162	1.7%	2.6%

*Source: Portland State University, Population Research Center*

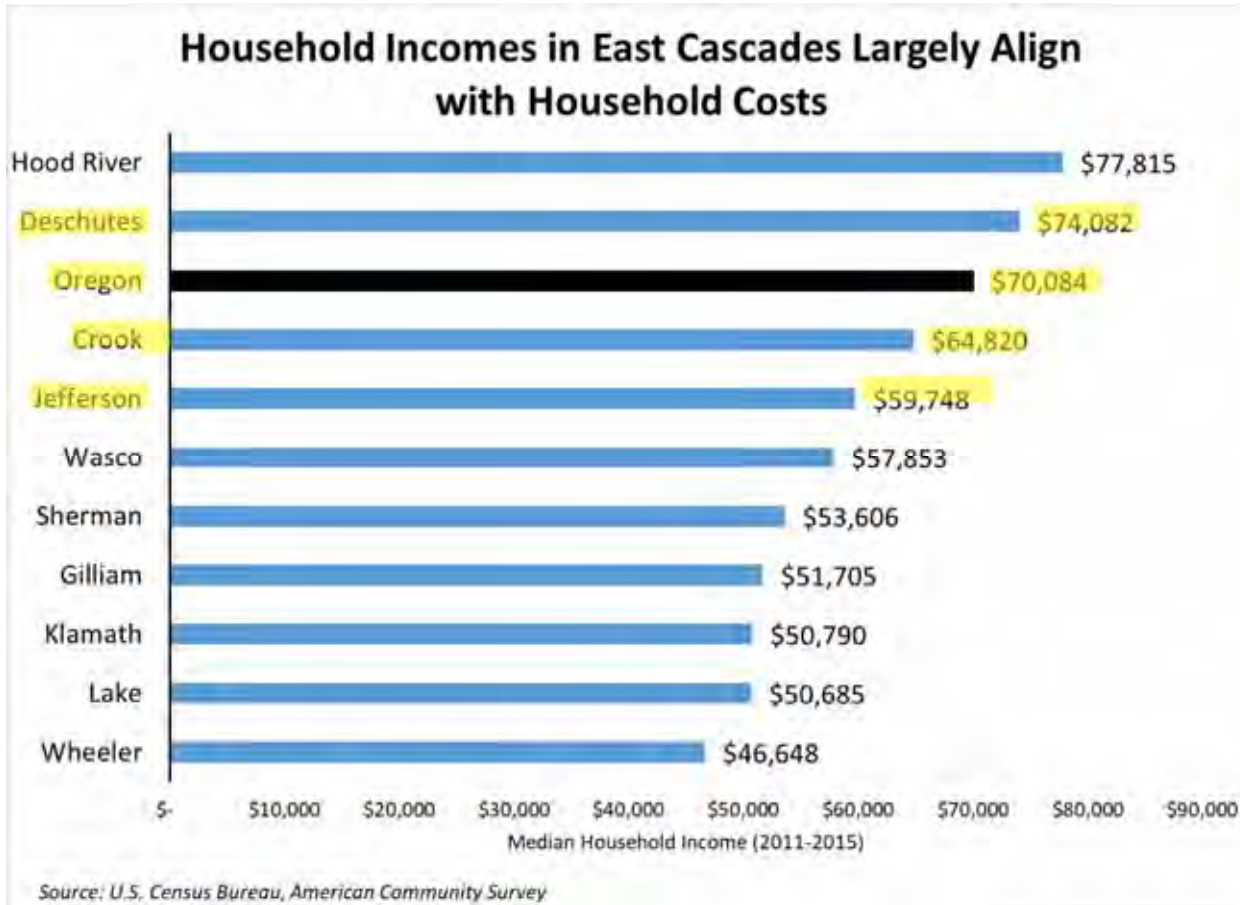


# Housing

Home prices rose dramatically during the pandemic



# Wages and Income



## Workforce

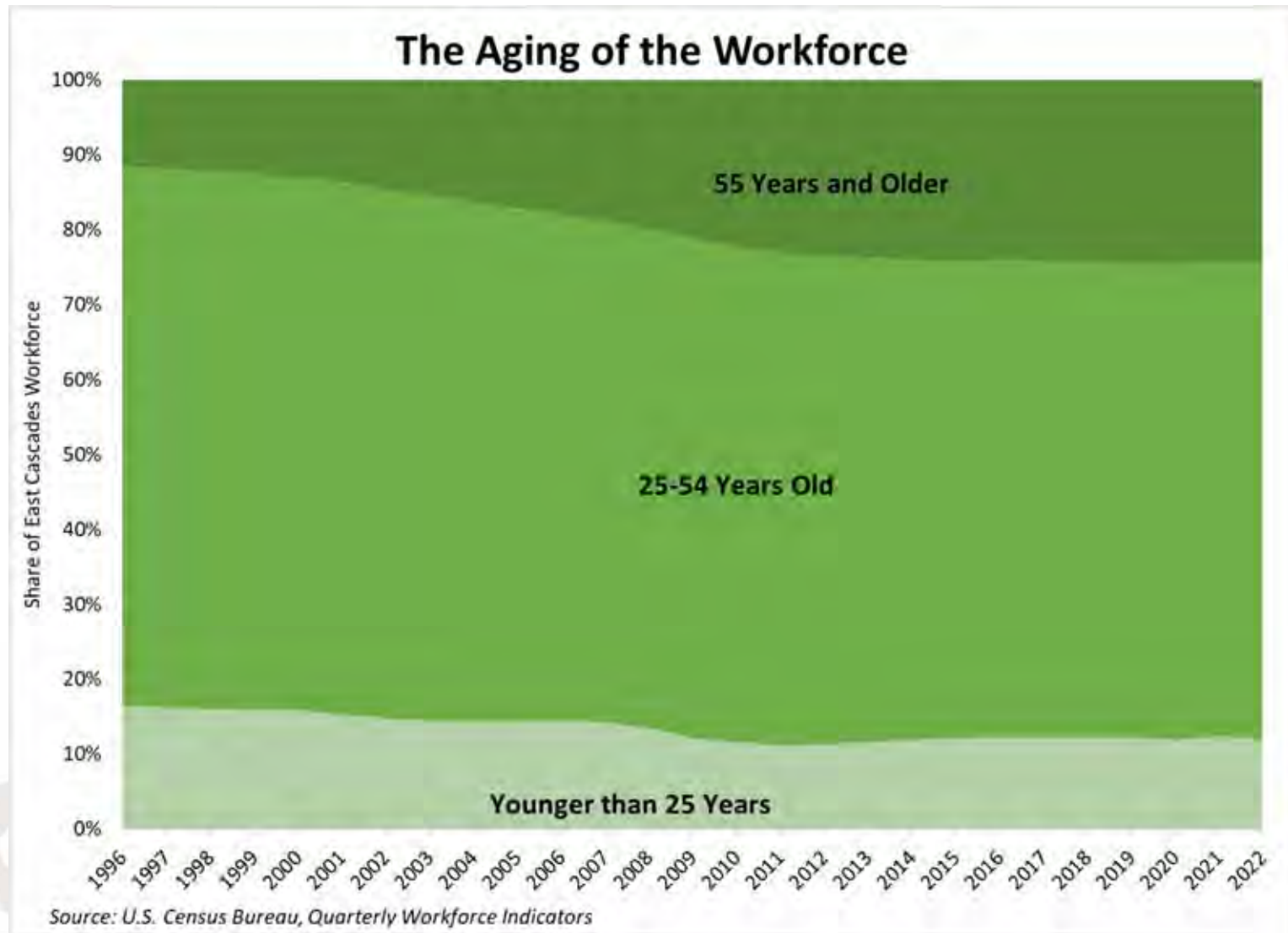


# 65%

Nearly 65% of the local workforce in Crook and Jefferson counties commutes out of their home county, most of those to jobs in Bend or Redmond.



The larger factor is a slower pace of population growth and the long-term trend of fewer births.





# Workforce



Where will our  
workforce  
come from?



Thank you!

**Heather Ficht**

Executive Director

East Cascades Works

Heather@ecworks.org

541-904-5070



[eastcascadesworks.org](http://eastcascadesworks.org)



# Thank You for Joining Us!

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