To request translation or disability-related accommodations, please contact us at **C4@clackamas.us** | **971-469-1468**.

Si quiere solicitar servicios de traducción o adaptaciones para la discapacidad, contáctenos en/al **C4@clackamas.us** | **971-469-1468**.

Чтобы запросить перевод или приспособления, связанные с инвалидностью, пожалуйста, свяжитесь с нами по: **C4@clackamas.us** | **971-469-1468**.

Щоб попросити переклад або спеціальні послуги для осіб з особливими потребами, зверніться до нас, скориставшись такими контактними даними: **C4@clackamas.us** | **971-469-1468**.

如需翻译服务或残障相关的协助，请与我们联系：**C4@clackamas.us** | **971-469-1468**。

Để yêu cầu dịch vụ dịch thuật hoặc điều chỉnh liên quan đến tình trạng khuyết tật, vui lòng liên hệ với chúng tôi qua **C4@clackamas.us** | **971-469-1468.**

Clackamas County
www.clackamas.us

Clackamas County Coordinating Committee

C4 Meeting Agenda

Meeting Date: Thursday, October 01, 2026
Meeting Time: 6:45 PM – 8:30 PM
Zoom Option:
https://clackamascounty.zoom.us/j/87907881760?pwd=pbGJEyFcS6359SztXcINuEuD1cP123.1

AGENDA

6:45 PM	**Call to Order, Pledge of Allegiance, and Introductions** Presenters: Commissioner Paul Savas and Mayor Brian Hodson, Co-Chairs	**Page 03**
	Housekeeping – **Action Item** • Approve September 03, 2026 Meeting Minutes • Approve PROTECT Grant Letter of Support	**Page 06**
7:00 PM	**Employment Land Supply** Presenters: Laura Edmonds and Jamie Stasny, Clackamas County	**Page 10**
7:25 PM	**Values and Outcomes Discussion Drafts** Presenters: Jaimie Lorenzini, Regional Solutions • Review discussion-draft language • Send additional feedback to C4@clackamas.us by Friday, October 23	**Page 21**
8:20 PM	**Other Business** • R1ACT Updates • JPACT Updates • MPAC Updates	
8:30 PM	**Adjourn**	

2026 Membership Roster

Clackamas County Coordinating Committee

Current Voting Membership

SEAT	MEMBER	C4 EXEC	C4 METRO	C4 RURAL	JPACT	MPAC	R1ACT
CLACKAMAS COUNTY	Commissioner Paul Savas	Yes	Yes	Yes	Yes		Yes
CLACKAMAS COUNTY	Commissioner Diana Helm		Yes	Yes		Yes	
CANBY	Mayor Brian Hodson	Yes		Yes			Yes
CPOS	Pamela Burback (Boring CPO)	Yes	Yes	Yes			
ESTACADA	Mayor Sean Drinkwine			Yes			
FIRE DISTRICTS	Matthew Silva (Estacada FD)	Yes					
GLADSTONE	Mayor Michael Milch	Yes	Yes				
HAMLETS	Mark Hillyard (Beavercreek)		Yes	Yes			
HAPPY VALLEY	Councilor Josh Callahan		Yes				
JOHNSON CITY	Luan Evans						
LAKE OSWEGO	Mayor Joe Buck		Yes		Yes	Yes	
MILWAUKIE	Councilor Will Anderson		Yes			Yes	
MOLALLA	Mayor Scott Keyser			Yes			
OREGON CITY	Commissioner Adam Marl		Yes			Yes	
PORTLAND	Vacant						
RIVERGROVE	Mayor Chris Barhyte		Yes				
SANDY	Councilor Rich Sheldon			Yes			
SANITARY DISTRICTS	Paul Gornick (OLWS)		Yes				
TUALATIN	Councilor Valerie Pratt		Yes				Yes
WATER DISTRICTS	Sherry French (CWD)	Yes	Yes			Yes	
WEST LINN	Mayor Rory Bialostosky		Yes				
WILSONVILLE	Mayor Shawn O'Neil		Yes				

Table 1: Current Voting Membership

Current Ex-Officio Membership

SEAT	MEMBER
MPAC CITIZEN REP	Ed Gronke
METRO COUNCIL	Councilor Christine Lewis
PORT OF PORTLAND	Daniel Eisenbeis
RURAL TRANSIT	Todd Wood (Canby Area Transit)
URBAN TRANSIT	John Serra (TriMet)

Table 2: Current Ex-Officio Members

Frequently Referenced Acronyms and Short-forms:

Related to the Clackamas County Coordinating Committee (C4)

C4MS: C4 Metro Subcommittee
CTAC: Clackamas Transportation Advisory Committee (C4 Transportation TAC)

Related to Metro and Metro Committees

JPACT: Joint Policy Advisory Committee on Transportation (Metro)
TPAC: Transportation Policy Advisory Committee (JPACT TAC)
MPAC: Metro Policy Advisory Committee (Metro)
MTAC: Metro Technical Advisory Committee (MPAC TAC)
RWAC: Regional Waste Advisory Committee (Metro)
SHS RPOC: Supportive Housing Services Regional Policy Oversight Committee (Metro)

Related to the Oregon Department of Transportation (ODOT) and Tolling

50/30/20: Highway Trust Fund distribution between ODOT, counties, and cities
OTC: Oregon Transportation Commission (ODOT policy decision body)
Region 1: ODOT's geographic designation for the metro area + Hood River
R1ACT: ODOT Region 1 Advisory Committee on Transportation
UMO: ODOT's Urban Mobility Office

General Transportation Acronyms

DTD: Clackamas County's Department of Transportation and Development
STIP: State Transportation Improvement Plan (ODOT)
RTP: Regional Transportation Plan (Metro)
TSP: Transportation System Plan (Local – county and cities)
HCT: High Capacity Transit
UPWP: Urban Planning Work Program

General Housing and Land Use Acronyms

CFEC: Climate-Friendly and Equitable Communities
HAPO: Housing Accountability and Production Office
H3S: Clackamas County's Health, Housing, and Human Services Department
HACC: Housing Authority of Clackamas County
SHS: Supportive Housing Services (Regionally approved funds for housing services)
OHCS: Oregon Housing and Community Services
LCDC: Land Conservation and Development Commission
DLCD: Department of Land Conservation and Development
UGB: Urban Growth Boundary
UGMA: Urban Growth Management Agreement

Clackamas County *Performance Clackamas*
Strategic Plan 2025-2030

Safe, Secure and Livable Communities

- *Affordable Housing:* By 2030, 900 affordable housing units will be developed, including an emphasis on the senior population and underserved parts of the County.

- *Jail:* By 2028, based upon best practices, the County will complete preliminary design concepts and estimates for a new Clackamas County Jail.

Vibrant Economy

- *Available Land for Business Development:* By 2028, in conjunction with our communities and partners, the County will work to increase available land to retain, expand and recruit new businesses.

- *Development Process:* By 2028, the County will conduct a review of all development regulatory processes to minimize burdens, providing an effective and timely permitting process for the community.

- *Childcare:* By 2027, in conjunction with our communities and community partners, the County will develop strategies to retain, expand and recruit new childcare opportunities.

Strong Infrastructure

- *Sunrise Corridor:* By 2030, funding for the next phase of the Sunrise Gateway Corridor/Hwy 212 project will be committed from federal, state, regional and local funding sources.

- *Transit:* By 2027, the County will provide a plan for what efficient, accessible and affordable transit looks like in Clackamas County.

Healthy People

- *Recovery Oriented System of Care (ROSC):* By 2027, the County will continue to address homelessness, mental health and substance use disorders through the completion and operations of the Clackamas County Recovery Campus.

Public Trust in Good Government

- *Best Practice Governance:* By 2026, convene a review committee to evaluate best practice county governance models.

- *Communications and Engagement:* By 2026, through the development of a strategic communications and engagement plan, the Clackamas County community will experience greater transparency and accountability from their County government.

Board approved 7.22.25

Clackamas County Coordinating Committee

Draft Minutes

Thursday, September 03, 2026
Happy Valley City Hall (Zoom Hybrid)
16000 SE Misty Drive, Happy Valley, OR 97086

The C4 Meeting was recorded and the audio is available on the County's website at https://www.clackamas.us/meetings/c4/c4meetings. Minutes document action items approved at the meeting, as well as member discussion.

(*) Denotes virtual attendee

I. Attendance:

Members: Clackamas County: Paul Savas; Diana Helm; **Canby:** Brian Hodson; **CPOs**: Pam Burback; **Estacada:** Melissa Hill; **Fire District:** Matthew Silva*; **Gladstone**: Michael Milch; **Hamlets:** Mark Hillyard*; **Happy Valley:** Josh Callahan; **Johnson City:** Luan Evans; **Lake Oswego:** Joe Buck*; **Metro:** Christine Lewis; **Milwaukie:** Will Anderson; **Oregon City:** Mike Mitchell; **Sandy**: Rich Sheldon*; **Sanitary District:** Paul Gornick*; **Transit (Rural):** Todd Wood*; **Transit (Urban):** Dwight Brashear* (Alt.); **Tualatin:** Valerie Pratt; **Water District:** Sherry French*; **Wilsonville**: Shawn O'Neil

Staff: Jamie Lorenzini (PGA), Trent Wilson (PGA)

Guests: Grace Crunican (Governor's Office); Kathy Hyzy (Regional Solutions); Jamie Stasny (Clackamas); Kevin McGrane (Happy Valley); Jackie Moritz (Johnson City Council); Denyse McGriff (TriMet)

II. Housekeeping

August 06, 2026 meeting minutes approved.

III. Denyse McGriff Introduction

Denyse McGriff, Mayor of Oregon City, introduced herself as the newest appointee to the TriMet Board of Directors representing District 7.

IV. Conversation with Grace Curnican, Rebuilding our Transportation Vision Workgroup

Grace Crunican provided an update on the Rebuilding Our Transportation Vision Work Group. A report is due to the governor by the end of December and is expected to provide a menu of levers. Participants raised questions about messaging, right-sizing project commitments to anticipated revenue, and when a new ODOT director will be appointed. Members expressed interest in local revenue sharing, enhancing ODOT's operational capabilities, and appreciated the diverse voices and breadth of analysis of potential revenue sources. Concerns were also raised regarding a prior tolling initiative, trust, and public sentiment.

V. Update on Governor's Economic Prosperity Roadmap

Kathy Hyzy, Regional Solutions, presented on the Prosperity Roadmap, a state effort to retain and grow businesses, catalyze job creation, and accelerate economic growth. The roadmap includes six strategic initiatives, such as recruiting leadership, establishing a fast-track permitting program, and reducing barriers to investment. A prosperity council has advised on strategies to achieve goals in the prosperity roadmap. Kathy shared strategies that are currently under consideration. Participants highlighted the need for adequate industrial site readiness funding, tax burden challenges, the unique needs of small and micro-businesses, and questions about substance use.

VI. Other Business

- R1ACT received a presentation about ODOT's Construction Improvement Plan. Projects that cost more than $100m, irrespective of smaller phases, have been placed on the shelf. Councilor Lewis advocated that the CIP should be updated annually.
- JPACT has been discussing MTIP updates to the Interstate Bridge Replacement Project and Rose Quarter Project. I-5 will experience a traffic closure. Engagement is underway on the RTP, and JPACT will hear about transportation system management grants this fall. JPACT's trip to Washington, D.C. has been postponed.
- September is National Recovery Month. Mayor Buck noted high substance use disorder rates in Oregon, expressing concern that the state raises revenue from taxes on nicotine and gambling.
- MPAC previously discussed updates on the Future Vision Project, Regional Transportation work plan, and Community Connector Transit Study.

Adjourned at 8:31 pm

Clackamas County Coordinating Committee

Public Services Building
2051 Kaen Road
Oregon City, OR 97045
503-655-8581

Memo

Date: **October 01, 2026**
To: **C4 Members & Interested Parties**
From: **C4 Staff**
RE: **PROTECT Grant Support Letter**

Action Requested

Approve a letter in support of two local projects seeking funds through the U.S. Department of Transportation (USDOT) Federal Highway Administration (FHWA) Promoting Resilient Operations for Transformative, Efficient, and Cost-saving Transportation (PROTECT) Competitive Grant Program.

Background

Two organizations in Clackamas County have expressed intent to apply for PROTECT grant funding, including Clackamas County and the City of Milwaukie:

Rock Creek Junction Reconfiguration Project (Clackamas County)
Improvements will expand the signalized intersection at Rock Creek Junction, improve bike and pedestrian facilities, and widen and seismically retrofit the existing bridge on OR Highway 212. Rock Creek Junction is part of OR Highway 212/224, an Oregon Tier 2 seismic lifeline route and county-designated multi-hazard evacuation route.

Kellogg Creek Bridge Replacement Project (City of Milwaukie)
Improvements will remove a 14.5-acre impoundment behind a weir constructed in 1848 to alleviate high-water events, provide seismic upgrades to a freight railroad trestle, and restore fish passage into the Kellogg-Mt. Scott Creeks. Kellogg Creek Bridge is part of Highway 99E, a Tier 1 Regional Emergency Transportation Route.

The PROTECT Competitive Grant Program provides funding to plan for and make surface transportation more resilient to current and future weather events, natural disasters, and changing conditions, such as severe storms, flooding, drought, levee and dam failures, wildfire, rockslides, mudslides, sea level rise, extreme weather, including extreme temperatures, and earthquakes.

The PROTECT Competitive Grant Program funds projects that improve the resilience of the surface transportation system, including highways, public transportation, ports, and intercity passenger rail. Program goals include protecting: surface transportation assets by making them more resilient; communities through resilience improvements and strategies that allow for the continued operation or rapid recovery of surface transportation systems; coastal infrastructure; and natural infrastructure that protects and enhances surface transportation assets.

Clackamas County
Coordinating Committee

Public Services Building
2051 Kaen Road
Oregon City, OR 97045
503-655-8581

DRAFT October 01, 2026

Secretary Sean Duffy
United States Department of Transportation
1200 New Jersey Avenue, SE
Washington, DC 20590

Dear Secretary Duffy:

The Clackamas County Coordinating Committee (C4), composed of representatives from Clackamas County, its cities, transit providers, special districts, and community planning organizations, writes to endorse local priorities for the Promoting Resilient Operations for Transformative, Efficient, and Cost-saving Transportation (PROTECT) Competitive Grant Program. Our membership, which has been tasked with coordinating among jurisdictions within Clackamas County and forming unified positions on land use and transportation plans, is pleased to support the following projects, in no particular order:

Rock Creek Junction Reconfiguration Project (Clackamas County)
Improvements will expand the signalized intersection at Rock Creek Junction, improve bike and pedestrian facilities, and widen and seismically retrofit the existing bridge on OR Highway 212. Rock Creek Junction is part of OR Highway 212/224, an Oregon Tier 2 seismic lifeline route and county-designated multi-hazard evacuation route.

Kellogg Creek Bridge Replacement Project (City of Milwaukie)
Improvements will remove a 14.5-acre impoundment behind a weir constructed in 1848 to alleviate high-water events, provide seismic upgrades to a freight railroad trestle, and restore fish passage into the Kellogg-Mt. Scott Creeks. Kellogg Creek Bridge is part of Highway 99E, a Tier 1 Regional Emergency Transportation Route.

We appreciate your partnership with Clackamas County communities in advancing these vital projects. Your support will make surface transportation more resilient in alignment with the goals of the PROTECT Competitive Grant Program.

Sincerely,

DRAFT
Commissioner Paul Savas
Clackamas County
C4 Co-Chair

DRAFT
Mayor Brian Hodson
City of Canby
C4 Co-Chair

C4 Membership: Clackamas County; the Clackamas Cities of Canby, Estacada, Gladstone, Happy Valley, Johnson City, Lake Oswego, Milwaukie, Molalla, Oregon City, Rivergrove, Sandy, Tualatin, West Linn, Wilsonville; Clackamas CPOs, Hamlets, and Special Districts; Ex Officio Members including Metro, MPAC Citizen, Port of Portland, Urban and Rural Transit

Employment Land Supply

Clackamas County Coordinating Committee

October 1, 2026

CLACKAMAS COUNTY
ECONOMIC DEVELOPMENT

Land Availability Studies

> "By 2028, in conjunction with our communities and partners, the County will work to increase available land to retain, expand, and recruit new businesses."

Performance Clackamas
Clackamas County Strategic Plan 2025-2030

01
Economic Landscape Analysis

COMPLETED · AUGUST 2026

A snapshot of the county's economic health using historical data, examining five industry clusters that provide family-wage jobs: advanced manufacturing, food systems, high tech, health systems, and logistics.

02
Industrial Site Readiness Study

COMPLETED · APRIL 2026

Examines industrially zoned properties 5+ acres in unincorporated Clackamas County to identify development-ready sites versus significantly constrained ones. Now being updated to add mixed-use and commercial lands.

03
Site Characteristics Study

COMPLETED · BUSINESS OREGON

Statewide site readiness study focused on land, site, and infrastructure requirements for key industrial clusters. Produces an Industrial Development Competitiveness Matrix used to assess feasibility.

04
Economic Opportunities Analysis Consolidation

COMPLETED · SEPTEMBER 2026

Consolidated summary of Clackamas County cities' Economic Opportunities Analysis (EOA), clarifying the goals, opportunities, and needs of our cities.

05
Land Suitability Assessment

LATE 2027 / EARLY 2028

Studies rurally zoned land inside the urban growth boundary and land in the county's urban reserves to understand potential industrial development opportunities and constraints, and clarify land, site, and infrastructure requirements for key clusters.

Why this matters

Employment land is foundational to job creation and economic resilience — businesses need sites that are appropriately zoned, serviced, and ready to develop.

Together, these studies give Clackamas County a stronger factual foundation to understand employment land needs, identify opportunities and constraints, and plan for growth.

EOA Consolidation

04
Economic Opportunities Analysis Consolidation

COMPLETED · SEPTEMBER 2026

Project Overview

- Analyzed the Economic Opportunity Analyses of 10 cities* within Clackamas County.
- Compared the buildable land available for industrial and commercial uses with the forecasted land demand in the cities' EOAs.

Gladstone and Oregon City are not included in this analysis due to lack of publicly available EOAs at the time of this report.

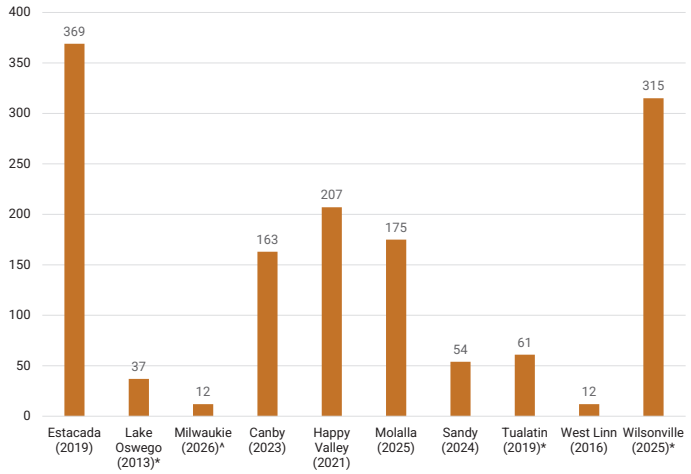
EOA Consolidation Considerations

01 Many jurisdictions use different criteria to classify land as vacant, partially vacant, or redevelopable.

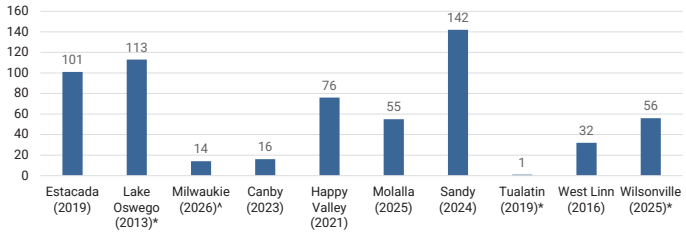
02 This analysis is a snapshot in time. The status of parcels and sites are based on the most recent best available data, which ranges from 2019-2025.

03 The data provided indicates that much of the employment land is impacted by one or more environmental constraints, including slope, wetlands, or floodplain. However, the acreage figures in this analysis are the net unconstrained acres. The constrained land has been removed.

Total Acres of Buildable Industrial Land & Commercial Land by Share of Cities' Area within Clackamas County (Vacant and Redevelopable Combined)



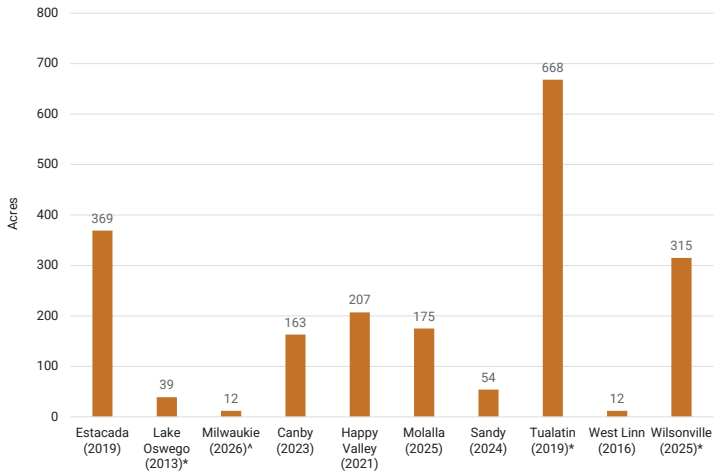
Buildable Industrial Land Acreage



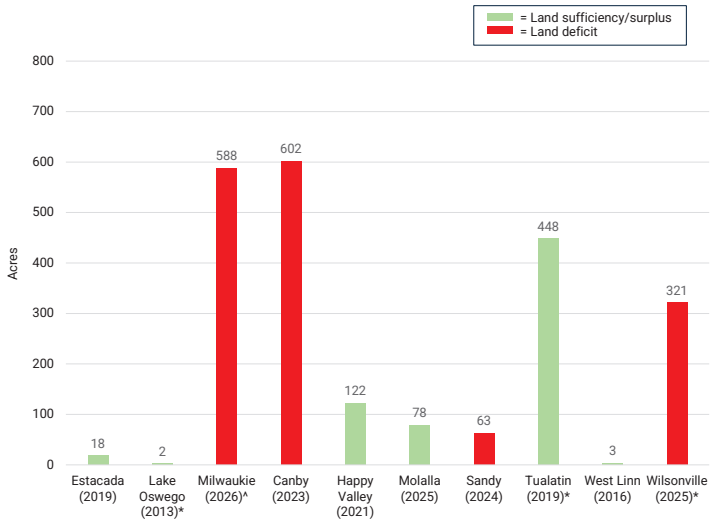
Buildable Commercial Land Acreage

*Part of city is located within a different county.
^Milwaukie's EOA was completed in 2017, but their BLI methodology was re-run to produce updated data in 2026

Total Acres of Buildable Industrial Land vs. Demand for Industrial Land by City (Vacant and Redevelopable Combined)



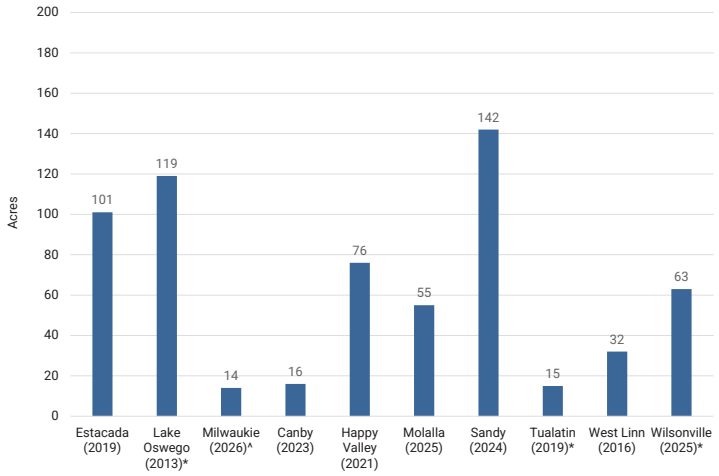
Buildable Industrial Land



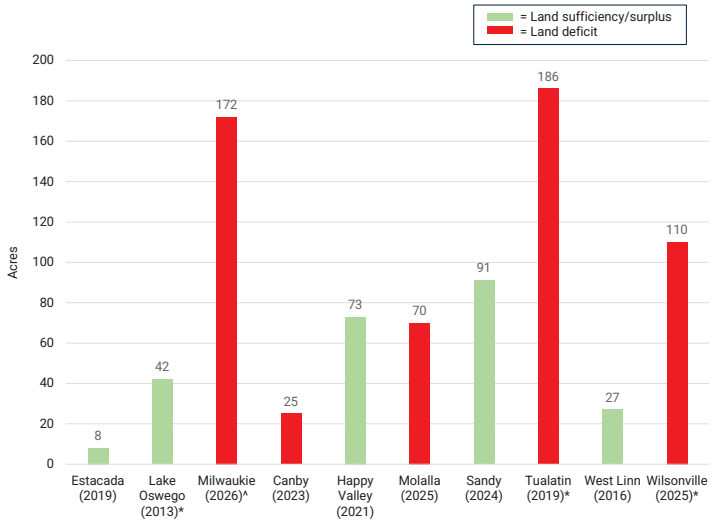
Industrial Land Demand

*Part of city is located within a different county.
^Milwaukie's EOA was completed in 2017, but their BLI methodology was re-run to produce updated data in 2026

Total Acres of Buildable Commercial Land vs. Demand for Commercial Land by City (Vacant and Redevelopable Combined)



Buildable Commercial Land



Commercial Land Demand

*Part of city is located within a different county.
^Milwaukie's EOA was completed in 2017, but their BLI methodology was re-run to produce updated data in 2026

Buildable Lands Inventory

Buildable Lands Inventory Methodology

01 Data was sourced from Metro's 2024 Buildable Lands Inventory* for the following: Gladstone, Happy Valley, Lake Oswego, Milwaukie, Oregon City, West Linn, and Wilsonville.

02 Data was sourced directly from jurisdictional partners for the following: Canby (2023), Estacada (2019), Molalla (2025), and Sandy (2024)

03 The Buildable Employment Land (BLI) datasets includes industrial, commercial, and mixed use and is considered "buildable," but not necessarily "development-ready."

*No buildable employment land parcels were identified by Metro in Johnson City and Tualatin (the portion of the City within Clackamas County), so those jurisdictions have not been included in this section.

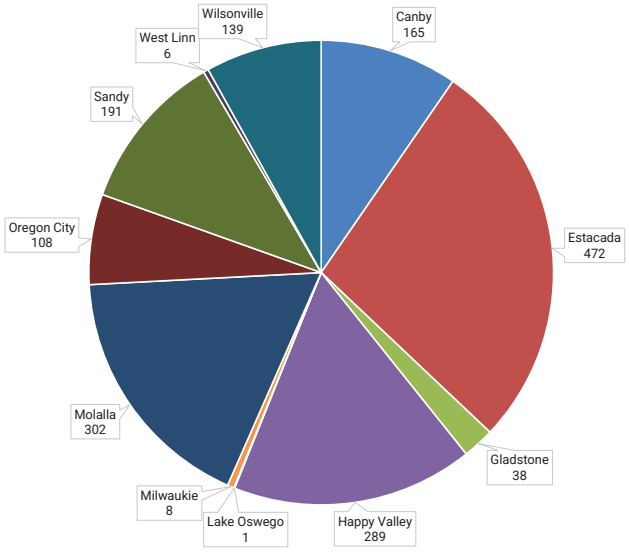
Buildable Lands Inventory (BLI)

Combined, jurisdictions have approximately **930 parcels** of BLI – estimated at 1,700 acres

BLI Parcel Sizes		
Smaller than 1 Acre	**1 – 4.99 Acres**	**Larger than 5 Acres**
68% of parcels	22% of parcels	<10% of parcels, but 1,000 acres of the 1,700 BLI

Primary Location of BLI	
Inside Metro	**Outside Metro**
Happy Valley, Oregon City, and Wilsonville each have over 100 acres of BLI, with most parcels (276 out of 373) smaller than 1 acre.	66% of the BLI is in Canby, Estacada, Molalla, and Sandy.

Buildable Employment Land by Jurisdiction (Acres)



Buildable Lands Inventory (BLI)

TABLE 11: BUILDABLE EMPLOYMENT LAND BY JURISDICTION (ACRES)

	Inside Metro								Outside Metro					
	Gladstone	Happy Valley	Oregon City	Lake Oswego	Milwaukie	West Linn	Wilsonville	Inside Metro Subtotal	Canby	Estacada	Molalla	Sandy	Outside Metro Subtotal	Total
Commercial	**1**	**0**	**12**	**0**	**0**	**0**	**6**	**19**	**13**	**101**	**91**	**137**	**342**	**361**
Vacant	1	0	0	0	0	0	4	5	11	61	54	53	178	183
Partially Vacant/ Infill	0	0	11	0	0	0	0	11	0	11	37	85	132	143
Redevelopable	0	0	1	0	0	0	2	3	2	30	0	0	32	35
Industrial	**37**	**273**	**86**	**0**	**8**	**6**	**133**	**543**	**152**	**371**	**211**	**54**	**788**	**1,331**
Vacant	0	180	28	0	1	3	47	259	112	212	131	23	479	738
Partially Vacant/ Infill	37	92	56	0	7	1	86	279	30	126	80	30	267	546
Redevelopable	0	1	2	0	1	1	0	5	9	32	0	0	41	46
Mixed Use	**0**	**16**	**10**	**1**	**0**	**0**	**0**	**27**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**27**
Vacant	0	16	10	1	0	0	0	27	n/a	n/a	n/a	n/a	n/a	27
Partially Vacant/ Infill	0	0	0	0	0	0	0	0	n/a	n/a	n/a	n/a	n/a	0
Redevelopable	0	0	0	0	0	0	0	0	n/a	n/a	n/a	n/a	n/a	0
Total	**38**	**289**	**108**	**1**	**8**	**6**	**139**	**589**	**165**	**472**	**302**	**191**	**1130**	**1,719**

Key Takeaways



1,719 Acres

Buildable Employment Land

1.7 Acres

Average Parcel Size

0.25 Acres

Median Parcel Size

50 Acres

Largest Parcel

94 Acres

Largest Aggregated Site

Comprehensive Economic Development Strategy (CEDS)

CEDS Overview

- Every 5 years, the region is required to develop a Comprehensive Economic Development Strategy (CEDS).
- In partnership with CivicSol, Greater Portland Inc. (GPI) and Metro are currently developing the CEDS that is due at the end of 2026.
- The Greater Portland Economic Development District (GPEDD) Board/Steering Committee & Technical Advisory Committee (TAC) have been formed to guide the development of the next CEDS.
    - The TAC includes regional partners from Multnomah, Washington, Clackamas and Clark Counties.

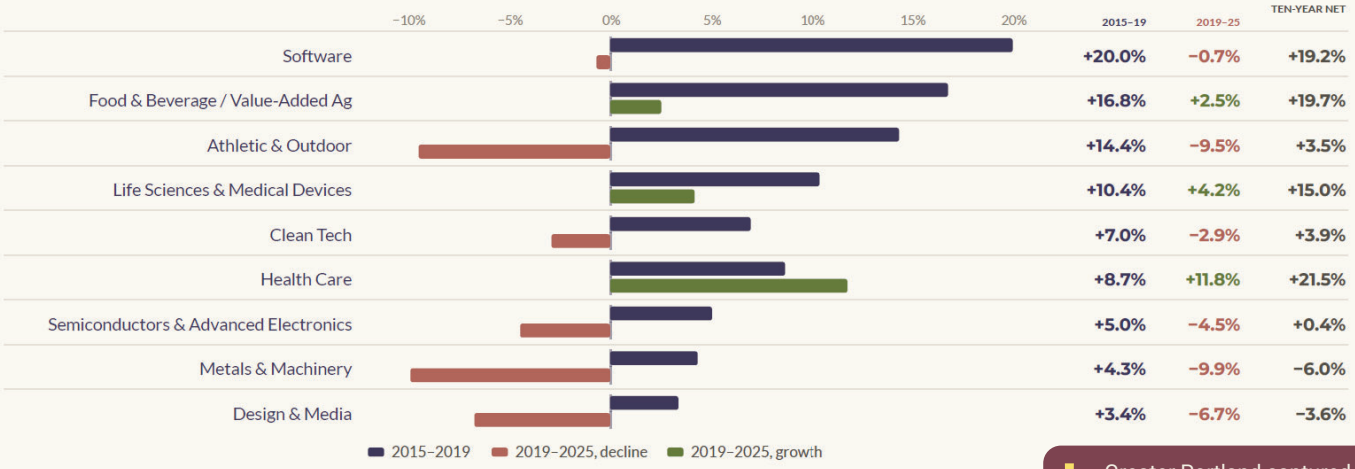


BRIEFING FINDING · THE 2019 TURN

01
OF 28

Every target cluster grew through 2019. Six of the eight have shrunk since.

The ten-year net figures average two different periods. Athletic & Outdoor added 6,031 jobs to 2019 and has lost 4,556 since; Semiconductors added 1,968 and has lost 1,827.



	2015–19	2019–25	TEN-YEAR NET
Software	+20.0%	−0.7%	+19.2%
Food & Beverage / Value-Added Ag	+16.8%	+2.5%	+19.7%
Athletic & Outdoor	+14.4%	−9.5%	+3.5%
Life Sciences & Medical Devices	+10.4%	+4.2%	+15.0%
Clean Tech	+7.0%	−2.9%	+3.9%
Health Care	+8.7%	+11.8%	+21.5%
Semiconductors & Advanced Electronics	+5.0%	−4.5%	+0.4%
Metals & Machinery	+4.3%	−9.9%	−6.0%
Design & Media	+3.4%	−6.7%	−3.6%

2015–2019 · 2019–2025, decline · 2019–2025, growth

Employment by cluster, 2015, 2019 and 2025. Source: CivicSol analysis of Lightcast 2026.3 data and supplied Greater Portland cluster datasets.

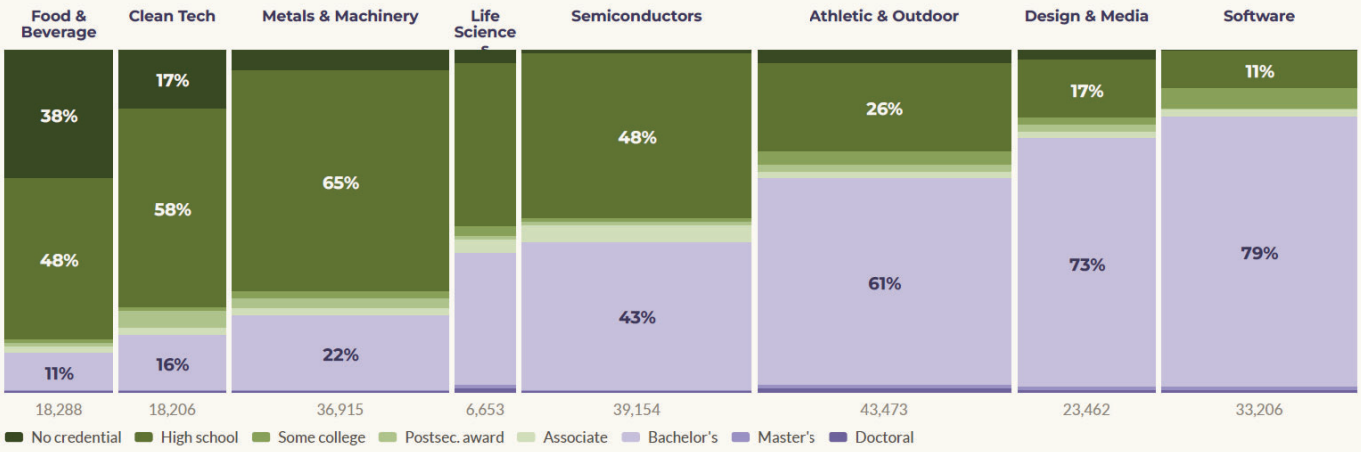
Greater Portland captured 1 job for every 10 its industry mix could have produced.

GREATER PORTLAND · INDUSTRY CLUSTER ANALYSIS · CIVICSOL

BRIEFING FINDING · CREDENTIAL PATHWAYS

Credential pathways divide the portfolio between production and knowledge-intensive clusters.

Column width is cluster employment. Food & Beverage / Value-Added Ag sits 89% below a bachelor's degree; Software sits 80% above it.



Source: CivicSol analysis of Lightcast 2026.3 industry data for the Greater Portland region across Oregon and Southwest Washington.

SECTION 2 · CLUSTER PROFILES

Nine profiles, and where each one stands.

Each profile runs in the same order: the story, who works here, pathways, workforce renewal, and value and supply chain. Health Care is a local-serving system and is read differently from the traded clusters. The workforce deep dive begins on page 102.

CLUSTER	2025 JOBS	LQ	2015–25	2019–25	PAGES
Semiconductors & Advanced Electronics	39,154	4.23	+0.4%	−4.5%	46–51
Athletic & Outdoor	43,473	1.80	+3.5%	−9.5%	52–57
Food & Beverage / Value-Added Ag	18,288	1.10	+19.7%	+2.5%	58–63
Software	33,206	1.08	+19.2%	−0.7%	64–69
Clean Tech	18,206	1.10	+3.9%	−2.9%	70–75
Metals & Machinery	36,915	1.11	−6.0%	−9.9%	76–81
Design & Media	23,462	1.17	−3.6%	−6.7%	82–87
Life Sciences & Medical Devices	6,653	0.82	+15.0%	+4.2%	88–93
Health Care	143,616	—	+21.5%	+11.8%	94–101



05 · BENCHMARKING METRICS

5.8 Tax Climate

Oregon ranks below average overall (35th). Washington ranks among the weakest benchmark states (45th) for tax competitiveness.

State Tax Competitiveness Index rank of 50 states, 2026 (lower is stronger).

STATE	OVERALL	CORPORATE	INDIVIDUAL	SALES	PROPERTY
Tennessee	8	48	1	47	32
Indiana	10	7	20	14	4
Missouri	12	5	17	25	12
Arizona	14	13	9	45	10
Utah	15	12	10	26	14
Nevada	20	39	8	41	9
Wisconsin	21	31	34	7	7
Kansas	23	26	28	21	26
Kentucky	25	19	25	20	30
Colorado	33	20	21	39	34
Oregon	**35**	**49**	**41**	**4**	**28**
Pennsylvania	36	34	38	24	13
Ohio	39	45	33	44	5
Minnesota	44	31	44	35	23
Washington	**45**	**47**	**31**	**49**	**25**
California	48	41	49	46	27

Source: Tax Foundation, 2026 State Tax Competitiveness Index.

A MENU, NOT AN EDGE

35th
Oregon overall, of 50

45th
Washington overall, of 50

4th / 49th
Oregon sales / Washington sales

> The region straddles two opposite tax systems, giving employers a real choice of structure. But both states rank in the lower half nationally, so neither is a clear competitive advantage.

Involvement Opportunities & Next Steps

CivicSol will perform an Emerging Trends and Economic Disruption Analysis; Steering Committee and TAC meet again early November.

Once all steps are completed, all findings will be compiled into the recommended regional CEDS; final strategies are due by 12/31/2026.

For additional information, contact:

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Clackamas County Coordinating Committee

Public Services Building
2051 Kaen Road
Oregon City, OR 97045
503-655-8581

Memo

Date: **October 01, 2026**
To: **C4 Members & Interested Parties**
From: **C4 Staff**
RE: **Values and Outcomes Discussion Language**

Action Requested

Discussion only.

Background

The Clackamas County Coordinating Committee (C4), an advisory group to the BCC, has expressed interest in collaborating to advance joint advocacy documents on economic development and transportation policies. These documents are intended to reflect shared "values and outcomes" on these two topics ahead of the 2027 state legislative session. C4 has developed similar documents previously, representing the "Communities of Clackamas County".

Over the summer, county staff reviewed feedback from recent C4 meetings, a local economic development survey, and additional input from county technical staff. These insights were incorporated into discussion draft V&O documents to serve as a starting point for discussion.

C4 will review this draft at their October 1 C4 meeting, with a request to submit additional feedback to C4@clackamas.us by October 23. Revised drafts are anticipated to come back to C4 in November and into the winter.

10/1 Topics for C4 Feedback

1. Do the discussion draft documents accurately reflect your feedback over this summer?
2. Is anything missing from the discussion draft documents?
3. Do you need more information about any of the policy concepts?

Proposed Process

Task	Timeline
1.1 Document development (ClackCo staff)	July to August
1.2 Engage BCC	September, December, January
1.3 Consult C4 on drafts	October to November, February
1.4 Solicit county, city logos	January to February
1.5 Finalize documents at C4	March (2027)

DRAFT Joint Values and Outcomes for Economic Development by the Communities of Clackamas County

Approved on March XX, 2027

The communities listed here are united in support of a resilient regional economy that provides long-term economic security for all. We believe that thriving businesses are necessary to generate family-wage jobs, sustain public services, and support community vitality. We are working toward these outcomes by prioritizing business retention, expansion, and attraction; fostering a diverse mix of industry; ensuring the availability and optimal use of employment land; and cultivating a strong workforce. The communities of Clackamas County submit these shared values to guide legislative solutions that strengthen Oregon's economic future.

These values are not an endorsement of any specific bill.

To ensure efficient implementation of policy changes, legislative solutions should…

- Be developed in collaboration with local voices and jurisdictions
- Protect and retain local authority to implement place-based solutions
- Reduce regulatory impediments for businesses
- Provide resources to effectively market employment land

To retain existing businesses, legislative solutions should…

- Explore targeted tax relief for the business community to spur living-wage jobs
- Preserve existing business incentives for retention, expansion, and recruitment
- Simplify and improve access to state incentive tools, including but not limited to Opportunity Zones and Enterprise Zones

To grow existing businesses, legislative solutions should…

- Prioritize funding for workforce training, development, and retention
- Enhance relationships between education institutions and industry sectors
- Develop strategies to retain, expand, and seek new childcare opportunities

To attract new businesses, legislative solutions should…

- Simplify the land use system to reflect site suitability, and ensure an adequate supply of development-ready sites
- Appropriate infrastructure funding at levels sufficient to meet development needs
- Prioritize transportation, water, and sewer projects that support employment areas and new housing
- Provide and fund tools that enable the creation of larger employment land parcels

DRAFT

DRAFT Joint Values and Outcomes for the 2027 State Legislative Transportation Package by the Communities of Clackamas County

Approved on March XX, 2027

The jurisdictions named here support a seamless, functional transportation system that prioritizes safety and the reliable movement of people and goods.

We acknowledge that without adequate transportation funding to address maintenance and capital projects in our communities, our collective transportation system will continue to struggle, maintenance projects will become capital projects, and our transportation systems will fail to meet public expectations and uses. As the state legislature considers funding solutions to address state and local needs, the values and outcomes named here will be the foundation of our advocacy.

These values are not an endorsement of any specific bill.

To ensure an equitable, balanced, and seamless system for all, a transportation package should…

- Protect and retain the 50/30/20 revenue formula from the State Highway Fund
- **Discussion Idea 1: Prioritize operations and maintenance funding**
- Increase safety and mobility for all travel modes and reduce diversion from highways onto local roads

To ensure maximum and efficient utilization of public dollars, a transportation package should…

- Diversify **(Discussion Idea 2) and index** revenue sources and funding tools for local and state agencies
- Maximize our opportunity to leverage federal funds
- **Discussion Idea 3: Ensure that funding tools are considered and advanced in collaboration with cities and counties to avoid disproportionate economic impacts or unfair burdens on people and communities**

To advance projects that build public trust and accountability, a transportation package should…

- Be developed in collaboration with local voices and jurisdictions
- Build trust through budget transparency, cost-saving measures, and limiting administrative costs
- **Discussion Idea 4: Strengthen ODOT's capacity to deliver projects, conduct meaningful public engagement, and implement best practices**

To provide accessibility and funding to multimodal facilities and services, a transportation package should…

- **Discussion Idea 5A: Expand transit options in Clackamas County, particularly in areas without existing service**
- **Discussion Idea 5B: Optimize administration of the State Transportation Improvement Fund to maximize the efficiency of existing transit dollars**
- Complete multimodal network gaps, including missing transit connections, sidewalks, and bike lanes
- Invest in transit and paratransit so that it is an equitable, safe, convenient, and connected travel option
- Identify sustainable long-term funding for micro-transit and first- and last-mile transit solutions

To support housing production and economic opportunities, a transportation package should…

- **Discussion Idea 6: Invest in transformative projects like the Sunrise Corridor and other state-owned facilities, like OR-43 and OR-211, to address growth in urban, suburban, and rural communities**
- Improve safety and reduce congestion on roads and bridges that connect urban and rural communities

Table 1 Explanation of Policy Discussion Ideas

Source and Explanation	Discussion Idea Number	Text Suggestion
C4 Retreat: Participants expressed broad support for prioritizing funding for maintenance and preservation.	1	**Add** "Prioritize emergency response, operations and maintenance funding"
Staff Consult: Indexing provides long-term funding stability.	2	**Add** "and index"
Staff Consult: Set expectations for potential funding tools.	3	**Add** "Ensure that funding tools are considered and advanced in collaboration with cities and counties to avoid disproportionate economic impacts or unfair burdens on people and communities"
C4 Retreat: Participants expressed a desire for additional accountability and trust building.	4	**Add** "Strengthen ODOT's capacity to deliver projects, conduct meaningful engagement, and implement best practices"
C4 Retreat: Transit providers expressed a need for funding. STIF funding increases were met with opposition. There was, however, broad interest in modifying administration of the STIF program.	5A & 5B	**Add** "Expand transit options in Clackamas County, particularly in areas without existing service" **Add** "Optimize administration of the State Transportation Improvement Fund to maximize the efficiency of existing transit dollars"
Staff Consult: Original language only cited Sunrise. Staff suggests broadening language for geographic diversity.	6	**Add** "Invest in transformative projects like the Sunrise Corridor and other state-owned facilities, like OR-43 and OR-211, to address growth in urban, suburban, and rural communities"

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