

January 2015



Salem Housing Needs Analysis and Economic Opportunities Analysis

Summary Report

Summary of Findings

Salem is Oregon's capital city and the regional economic center of the Mid-Willamette Valley. This report is a key part of the City's planning efforts to accommodate population and employment growth over the 2015 to 2035 period. Key findings about Salem's residential land needs are:



- **Salem provides opportunities for development of housing affordable to all income levels in Salem.** The range of housing types in Salem includes single-family detached, duplexes, townhouses, condominiums, manufactured housing, and apartments.
- **Salem has a surplus of land for single-family housing and a deficit of land for multifamily housing.** Salem's residential (about 1,975 acres) land base has capacity for about 9,000 more single-family houses than will be needed over the 20-year period and a deficit of land for about 2,900 multifamily units (about 207 acres).
- **Salem will need to address the deficit of multifamily land to comply with Statewide Planning Goal 10.** The City can meet the need for multifamily land in many different ways, such as: allowing a wider-range of housing in single-family zones (e.g., townhouses or tri-plexes), encouraging more mixed-use development, encouraging redevelopment of underutilized lands, and redesignating or rezoning land to allow multifamily housing. The City may choose to work with one or more advisory committees to develop and refine policies to address the deficit.

Key findings about Salem's land for employment uses are:

- **Salem's vision for economic development is growth of employment with higher-than-average wages.** Salem's broad economic development goal is to attract and retain jobs to increase the economic prosperity for Salem residents and businesses by helping to expand and grow existing businesses and by diversifying traded-sector businesses in Salem to support existing companies.
- **Salem has a deficit of 271 acres of land for commercial uses.** The City will can address this deficit through establishing neighborhood retail nodes in or near residential areas, encouraging redevelopment of underutilized commercial areas, and targeting conversion of other lands to commercial uses.
- **Salem's industrial land base is unique within the Willamette Valley.** Salem has about 900 acres of high value industrial land, in areas such as the Mill Creek Corporate Center. This study recommends that Salem manage its high value industrial land base to ensure future opportunities for high wage employment growth and to protect against conversion of high value industrial land to other uses.

The City is planning to meet the deficits of land for multi-family housing and commercial employment growth within the existing urban growth boundary (UGB).

Housing Needs Analysis: Introduction

The Housing Needs Analysis provides the City of Salem (“the City”) with a factual basis to support future planning efforts related to housing and options for addressing unmet housing needs in Salem. It provides the City with information about the housing market in Salem and describes the factors that will affect housing demand in Salem in the future, such as changing demographic patterns.

In addition, the Housing Needs Analysis is intended to comply with Statewide Planning Goal 10, which governs planning for housing and residential development. Goal 10 requires the City to plan for housing that meets identified needs for housing within an urban growth boundary, at particular price ranges and rent levels. In short, Salem must plan for a range of housing types at a range of price levels.

Salem’s Housing Needs Analysis focuses on planning for the housing needed to accommodate population growth between 2015 and 2035. The analysis considers a wide range of factors that will affect Salem’s housing market over the 20-year period, including: historical residential development trends, demographic changes (both historical and forecasts of future changes), and changes in housing costs and affordability.

The results of the Housing Needs Analysis are an estimate of needed housing in Salem for the next 20 years, organized by type of housing and by Comprehensive Plan Designation. These results were the basis for reviewing Salem’s housing policy, focusing on the City’s Comprehensive Plan housing policies and zoning policies.

City staff and ECONorthwest staff worked with an Advisory Committee to review the results of the Housing Needs Analysis. The Advisory Committee provided ideas and input into changes in Salem’s housing policies to address housing deficits, most notably in land needed for new single-family attached and multi-family housing.

PRODUCTS OF THE HOUSING NEEDS ANALYSIS



The primary purpose of the Housing Needs Analysis is to help decision makers develop policies to guide residential development over the next twenty years.

The project Advisory Committee was composed of a range of stakeholders in Salem, including neighborhood association representatives, developers, real estate agents, affordable housing providers, employers, Salem Planning Commissioners, and City Councilors.

Salem's Population and Households

Population and household characteristics help us understand Salem and the people who live here. Characteristics such as population growth, age of residents, and household size and composition provide useful information about how the characteristics of Salem's population and households compare to Marion County, Polk County, and Oregon.

Unless otherwise noted, all data in this document are from the 2010 Decennial Census or 2012 American Community Survey from the U.S. Census.

Salem's population is growing.

Between 2000 and 2013, Salem grew at about the same rate as Marion County and Oregon. Salem added more than 20,000 residents between 2000 and 2013.

AVERAGE POPULATION GROWTH PER YEAR, 2000-2013

Source: Portland State University, Population Research Center



POPULATION, 2013

Source: Portland State University, Population Research Center



Salem's population is young.

Salem has a relatively young population and a large share (29%) of young, working-age residents.

MEDIAN AGE, 2010

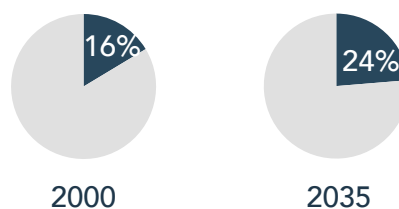


Salem's population is growing older.

By 2035, nearly a quarter of residents of Marion and Polk counties will be 60 or older.

PERCENT OF POPULATION AGED 60 AND OLDER, MARION AND POLK COUNTIES, 2000 & 2035

Source for 2035 projections: Oregon Office of Economic Analysis



SALEM'S POPULATION AND HOUSEHOLDS

AVERAGE NUMBER OF PEOPLE PER HOUSEHOLD, 2010

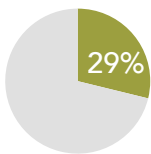
2.6
Salem

2.7
Marion Co.

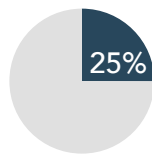
2.6
Polk Co.

2.5
Oregon

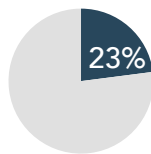
PERCENT OF HOUSEHOLDS THAT ARE SINGLE-PERSON, 2010



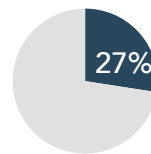
Salem



Marion Co.



Polk Co.

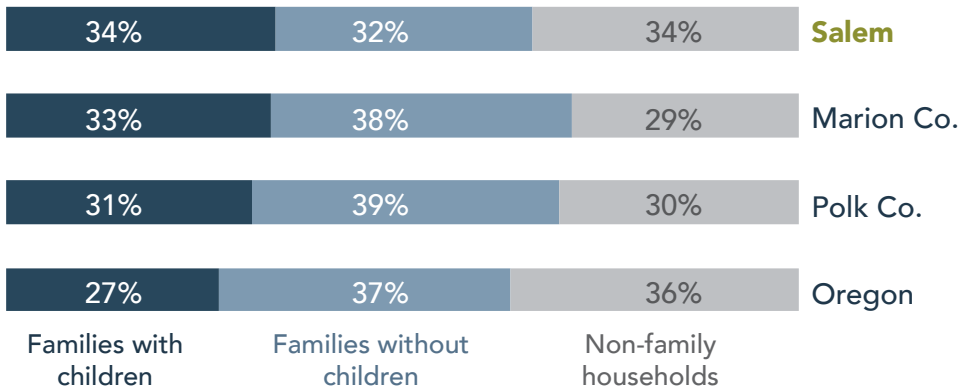


Oregon

Salem has a large share of single-person households.

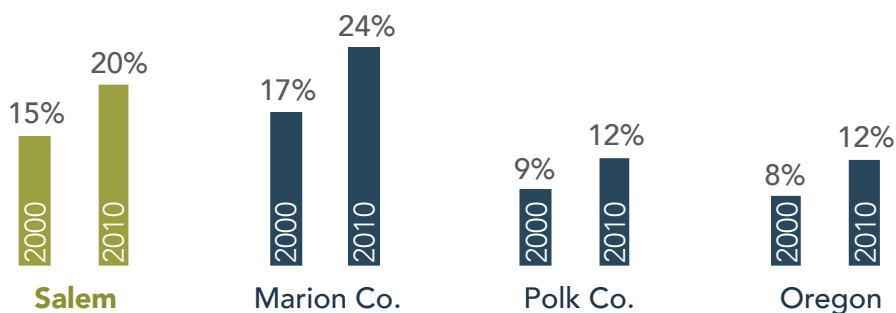
HOUSEHOLD COMPOSITION, 2012

A family household is one in which the householder is related to at least one other person in the household by birth, marriage, or adoption. Non-family households include people living alone, unmarried couples, and unrelated housemates.



Salem has more families with children and more non-family households than Marion or Polk Counties.

PERCENT OF POPULATION THAT IS HISPANIC OR LATINO, 2000 &



Salem's Hispanic or Latino population is growing.

Salem's Housing Market

Analysis of historical development trends in Salem provides insights into how the local housing market functions in the context of the Mid-Willamette Valley region. This report groups housing into the three types shown below.

HOUSING TYPES USED IN THIS PROJECT



Single-family detached
(includes mobile and
manufactured homes)



Single-family attached
(townhouses)

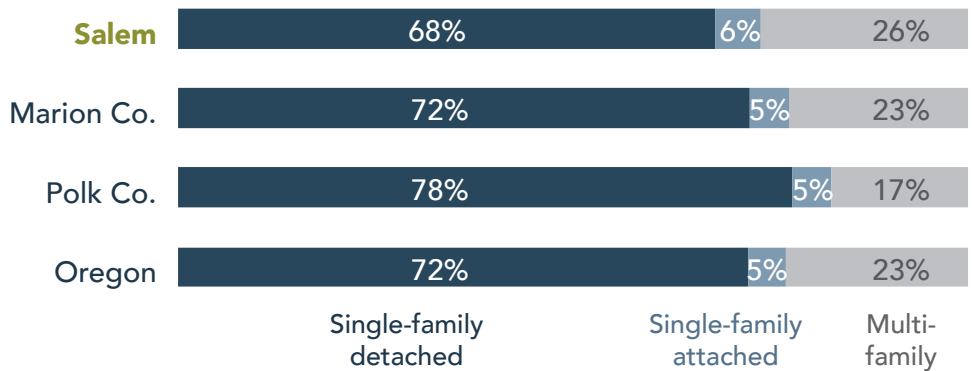


Multi-family
(condos, apartments,
duplexes)

Salem's housing market is primarily single-family detached housing.

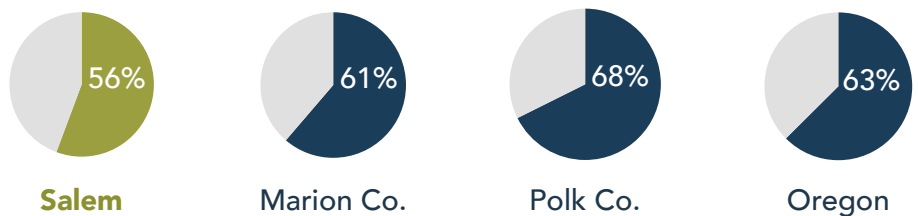
More than two-thirds of Salem's housing stock is single-family detached housing. Even so, Salem has a wider range of housing types than Marion or Polk counties.

MIX OF EXISTING HOUSING TYPES, 2012



Salem has a lower share of owners than Marion County, Polk County, or the state.

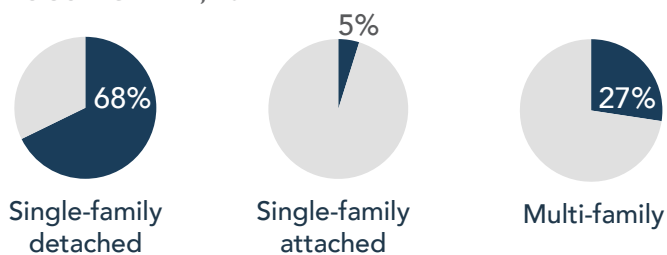
PERCENT OF HOUSING UNITS THAT ARE OWNER-OCCUPIED, 2012



Homeownership and housing type are related.

In Salem, most single-family detached housing is owner-occupied, and most multi-family is renter-occupied.

PERCENT OF SALEM'S HOUSING UNITS THAT ARE OWNER-OCCUPIED, BY HOUSING TYPE, 2012



SALEM'S HOUSING MARKET

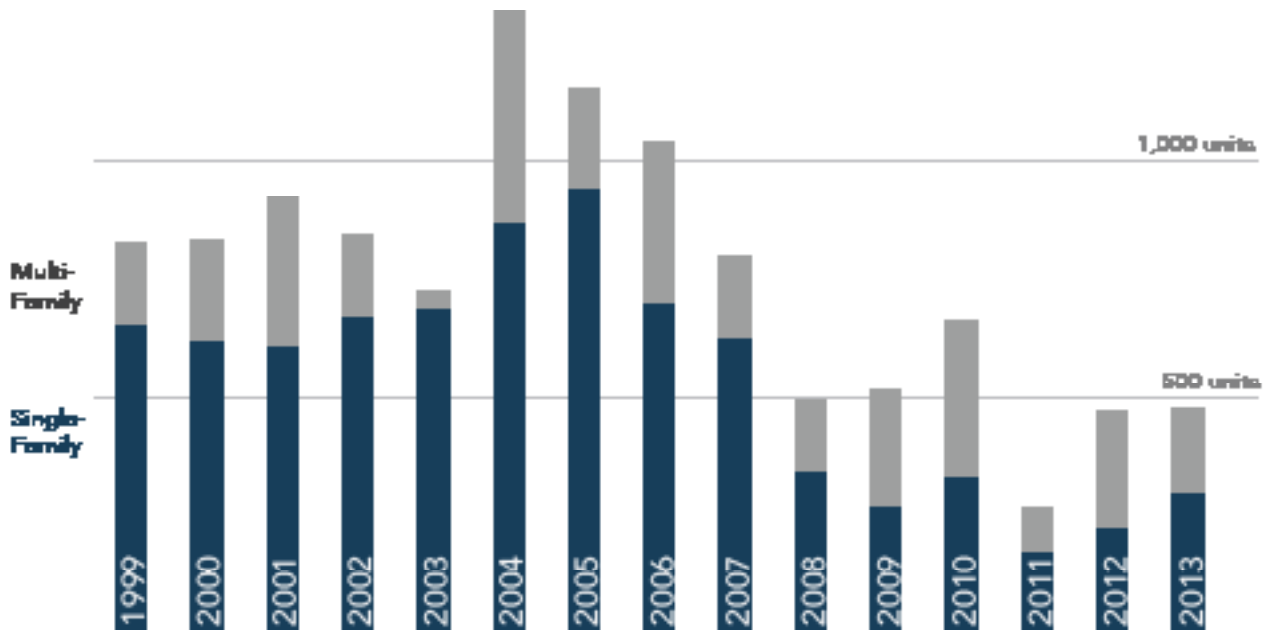
Salem added more than 11,000 dwelling units between 1999 and 2013, the majority of which were single-family (detached and attached combined). Salem added more than 3,500 multi-family units, including more than 200 units in commercial zones.

Salem's housing market is dominated by single-family housing types.

BUILDING PERMITS ISSUED, 1999-2013

Source: Salem Building Permit Database.

Single-family includes single-family detached, single-family attached and manufactured homes.



HOUSING DENSITY BY COMPREHENSIVE PLAN DESIGNATION (DWELLING UNITS PER NET ACRE), SALEM PORTION OF UGB, 1999-2013

Source: Salem Building Permit Database.

A net acre excludes area used for right-of-way.

CBD refers to Central Business District, COM; Commercial, and ROM; River-Oriented Mixed-Use.

Between 1999 and 2013, the average residential density in Salem was 8.0 dwelling units per net acre.

7.3

units/net acre

Single-Family Residential

6.6

units/net acre

Developing Residential

10.6

units/net acre

Multi-Family Residential

16.8

units/net acre

Mixed Use

25.9

units/net acre

Central Business District, Commercial, River-Oriented Mixed-Use

Affordability

The term *affordable housing* refers to a household's ability to find housing within its financial means. Housing affordability affects both higher- and lower-income households and is an important issue for Salem and the region. Low-income households have fewer resources available to pay for housing and have the most difficulty finding affordable housing. Key points about affordability include:

- Salem will have an ongoing need for housing affordable to lower-income households.
- The City is planning for needed housing types for households at all income levels and will work with non-profit and private housing providers to ensure availability of housing affordable to lower-income households.
- Future housing affordability will depend on the relationship between income and housing price. The key question, which is difficult to answer based on historical data, is whether housing prices will continue to outpace income growth.

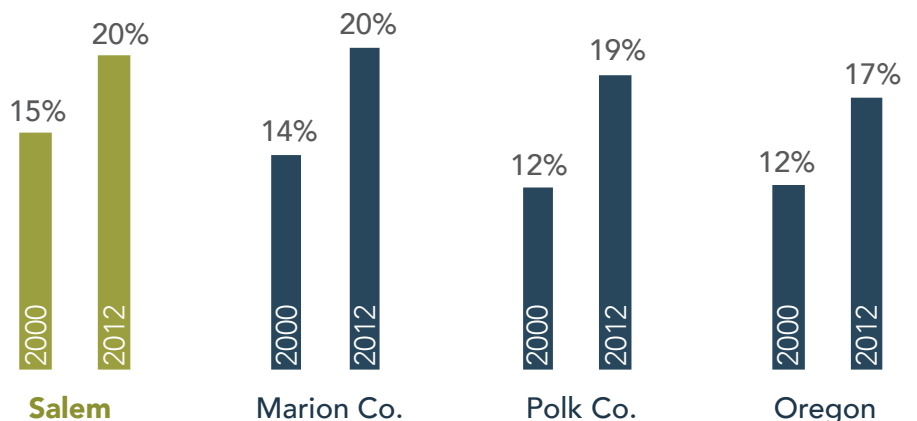
MEDIAN HOUSEHOLD INCOME, 2012



Between 2000 and 2012, poverty increased in Salem, consistent with regional and statewide trends.

POVERTY RATE, 2000 & 2012

The US Census determines poverty using income, family size, and family composition. In 2012, a family with two adults and two children was considered "in poverty" if family income was less than about \$23,200. The Census's poverty thresholds are consistent across the country and do not account for regional differences in cost of living.



PERCENT OF HOUSEHOLDS THAT ARE COST BURDENED, 2012

Cost-burdened households spend more than 30% of their gross income on housing.

39%
Salem

40%
Marion Co.

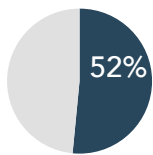
39%
Polk Co.

39%
Oregon

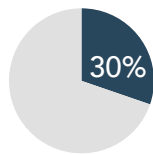
Cost burden is as common in Salem as it is in the region.

PERCENT OF SALEM'S HOUSEHOLDS THAT ARE COST BURDENED, BY OWNERSHIP STATUS, 2012

Cost-burdened households spend more than 30% of their gross income on housing.



Renter-occupied households



Owner-occupied households

Salem households that rent are more likely to be cost burdened than households that own.

AFFORDABLE HOUSING WAGE FOR A 2-BEDROOM APARTMENT, 2012

The affordable housing wage is based on the Fair Market Rent for a 2-bedroom apartment provided by U.S. Department of Housing and Urban Development (HUD). HUD calculates the Fair Market Rent for each metropolitan statistical area (MSA) as the amount below which 40% of standard-quality apartments are rented. A household making the affordable housing wage will be able to afford Fair Market Rent without spending more than 30% of household income on housing costs.

\$12.84/hr
Salem MSA

\$13.40/hr
Corvallis MSA

\$13.95/hr
Eugene MSA

\$15.42/hr
Portland MSA

AVERAGE HOME SALES PRICES, 2013

Source: Zillow, December 2013

\$169,000
Salem MSA

\$259,300
Corvallis MSA

\$196,200
Eugene MSA

\$256,000
Portland MSA

Home sales prices in Salem increased by 14% between 2000 and 2013.

RATIO OF MEDIAN OWNER-OCCUPIED HOUSING VALUE TO MEDIAN HOUSEHOLD INCOME, 2012

Lower ratios indicate that housing is more affordable. HUD's standard is 3.0.

3.9
Salem

4.1
Marion Co.

4.5
Polk Co.

4.6
Oregon

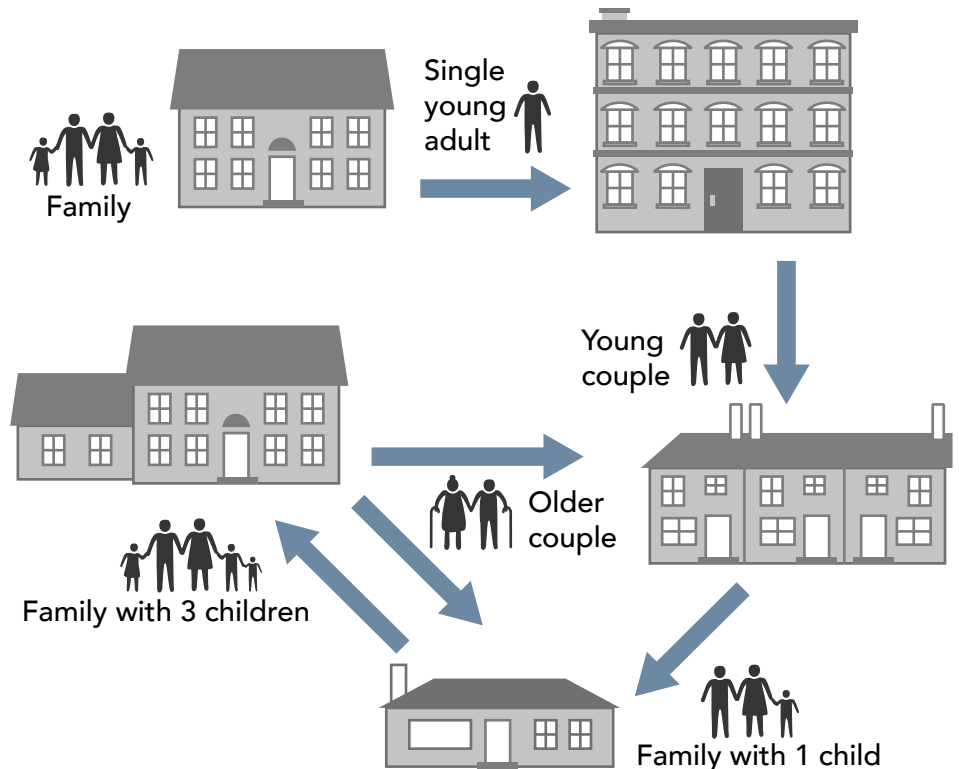
Salem's owner-occupied housing is more affordable than regional averages. The ratio of median owner value to median household income is calculated by dividing the median value of owner-occupied housing by the median household income.

Factors Affecting Housing Need

Studies and data analysis have shown a clear linkage between demographic characteristics and housing choice, as shown in the figure below. Key relationships include:

- Homeownership rates increase as income increases.
- Homeownership rates increase as age increases.
- Choice of single-family detached housing increases as income increases.
- Renters are much more likely to choose multi-family housing than single-family housing.
- Income is a strong determinant of tenure and housing-type choice for all age categories.

HOUSING LIFE CYCLE



The linkages between demographics and housing need can be used to predict future housing need in Salem. Three demographic trends are particularly important for Salem:

- Aging of the Baby Boomer Generation (born 1946 to 1964)
- Aging of the Millennial Generation (born early 1980s to early 2000s)
- Continued growth of the Hispanic/Latino population

Aging of the Baby Boomers

Consistent with state and national trends, Salem’s population is growing older. By 2035, 24% of the population of Marion and Polk Counties is forecasted to be 60 and over, up from 16% in 2000.

LIKELY TRENDS AMONG BABY BOOMER HOUSEHOLDS:



Implications for Salem’s Housing:

Need for smaller, lower-cost housing near transit and urban amenities such as shopping and health care services.

Aging of the Millennials

Salem is successful at attracting young, working-age people. If Salem continues to attract young people, then the City will continue to have demand for housing for families, especially housing affordable to younger families with moderate incomes.

LIKELY TRENDS AMONG MILLENNIAL HOUSEHOLDS:



Implications for Salem’s Housing:

Need for low-cost ownership opportunities with high quality of life.

Millennials’ incomes will increase as they age, but the impact of the Great Recession is unclear. Millennials’ ability to afford housing will impact the type of housing they can afford. In the next 3 to 7 years, most Millennials may need rental housing. Over the longer term, some Millennials will purchase homes, possibly smaller homes on smaller lots than their parents.

Continued growth of the Hispanic/Latino population

Salem’s Hispanic/Latino population grew by more than 11,000 people (57%) between 2000 and 2010. Nationwide, the Hispanic/Latino population is predicted to be the fastest growing racial/ethnic group over the next few decades.

Characteristics of Hispanic households compared to Non-Hispanic households

The following factors are predicted to drive demand for larger, lower-cost renting and ownership opportunities for larger households with more children and multiple generations:

Household sizes Larger than average household sizes.	Homeownership rates Lower than average home ownership rates.	Income Lower than average income.
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Development Capacity

Definitions

Buildable residential land:

Unconstrained suitable vacant and partially-vacant land designated for residential development.

Vacant land: Unconstrained suitable land designated for residential development.

Partially vacant land:

Unconstrained suitable land with existing residential development that could support additional residential development.

Constrained land: Land that is not available for development based upon one or more factors such as environmental protections or lands committed for public use.

Dwelling unit: Any type of residential structure. Salem has an average of 2.6 persons per dwelling unit.

Capacity: Number of dwelling units that can be accommodated on buildable land at planned densities.

Housing density: Number of dwelling units in an acre of land, with 43,560 square feet to 1 acre. Housing density can be expressed as the number of dwelling units per net or gross acre.

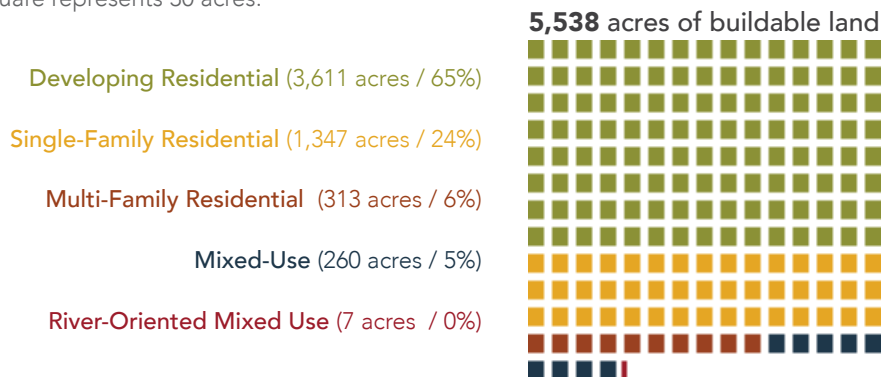
Gross acre: Includes rights-of-way (land used for roads and streets). Land used for rights-of-way is not buildable.

Net acre: Does not include rights-of-way.

Salem added more than 11,000 dwelling units between 1999 and 2013, the majority of which were single-family (detached and attached combined). Salem needs more than 3,500 multi-family units, of which more than 200 units could be located in commercial zones.

SALEM'S BUILDABLE VACANT AND PARTIALLY VACANT RESIDENTIAL LAND, BY COMPREHENSIVE PLAN DESIGNATION, 2014

1 square represents 30 acres.



The capacity analysis estimates the number of new dwelling units that can be accommodated on Salem's buildable vacant and partially vacant residential land. The capacity analysis provides an estimate of how much housing can be accommodated on Salem's buildable residential land based on historical densities, with deductions for land on slopes and areas for future rights-of-way.

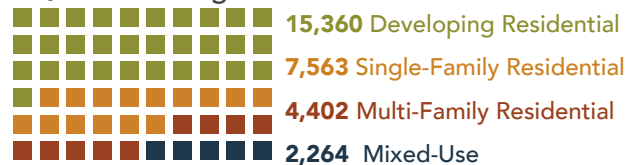
The capacity analysis shows that Salem's vacant and partially vacant land has capacity for more than 29,500 new dwelling units, about 75% of which are in Single-Family and Developing Residential Comprehensive Plan Designations. The majority of housing in these designations is single-family detached housing, with some lower-density attached housing allowed, such as duplexes and townhouses.

Capacity on Buildable Residential Land

CAPACITY ON RESIDENTIAL LAND, BY PLAN DESIGNATION

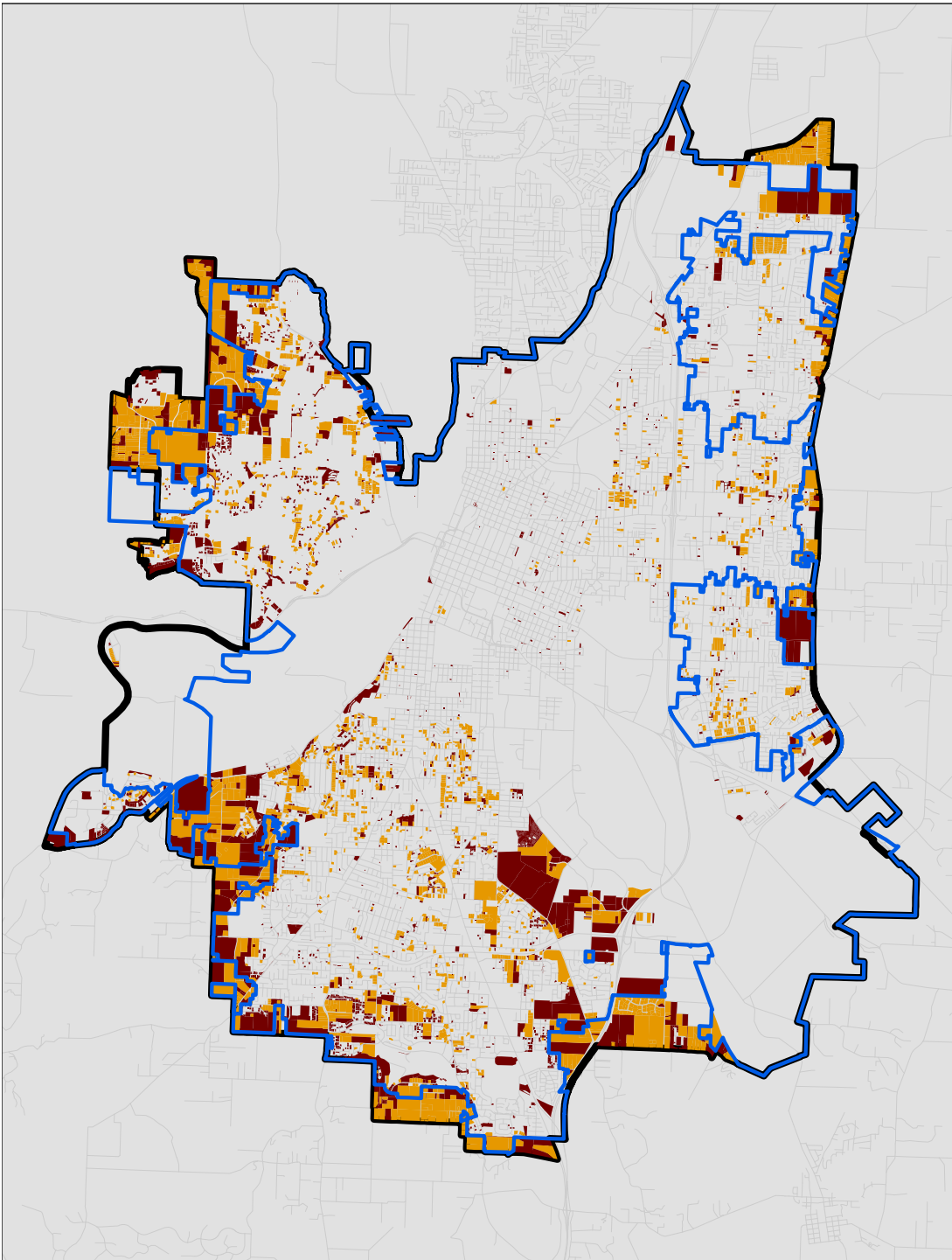
1 square represents 500 dwelling units.

29,589 dwelling units



DENSITY ON SALEM'S RESIDENTIAL LAND BASED ON HISTORICAL DENSITIES, DWELLING UNITS PER GROSS ACRE





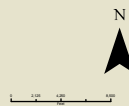
**Salem Residential BLI
Vacant and Partially Vacant Land
by Development Classification**

Legend

- City Limits
- UGB
- Roads

Development Classification

- Partially Vacant
- Vacant



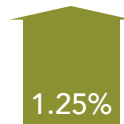
Mapping by EC2/MapSource
August 2014

Accommodating Needed Housing

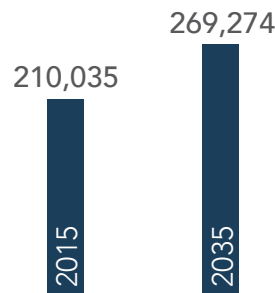
Demand for Residential Land, by Housing Type

Salem's population growth over the next 20 years will affect the number of new households created and the demand for residential land. Salem's forecast for new housing is based on the forecast for population growth. Using Marion County's adopted population forecast as the basis, Salem's population will grow at a rate of 1.25% per year, adding 59,239 new people between 2015 and 2035.

FORECASTED
AVERAGE ANNUAL
GROWTH RATE,
2015-2035



FORECASTED
TOTAL NEW
POPULATION,
2015-2035



Population increase:
59,239

New population in Salem will require 23,355 new dwelling units over the 20-year period. The analysis of the factors affecting housing need and demographic changes suggests that Salem need more diverse housing types, including more townhouses and single-family attached housing and more multi-family housing.

FORECASTED
TOTAL NEW
DWELLING UNITS,
2015-2035

23,355 new dwelling units



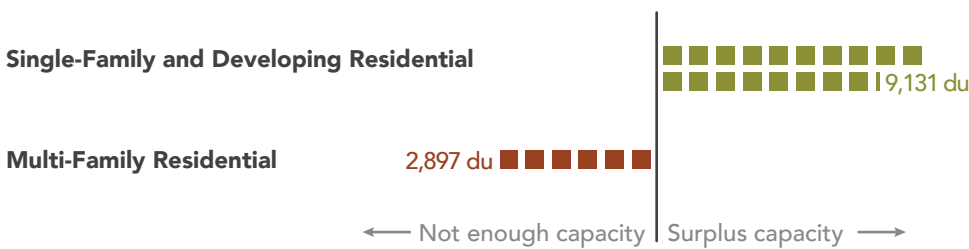
- 14,013** single-family detached (60%)
- 1,168** single-family attached (5%)
- 8,174** multi-family (35%)

1 square represents
500 dwelling units.

Comparison of Housing Capacity to Housing Demand

The last step in the Housing Needs Analysis is to compare the capacity of Salem’s vacant and partially-vacant residential land with demand for housing by Comprehensive Plan designation.

Salem has enough land to accommodate growth of housing in Single-Family and Developing Residential, with a surplus of capacity for 9,131 additional dwelling units. Salem has a deficit of land in the Multi-Family Residential designation. It needs land for 2,897 dwelling units, which will require about 207 acres of land.



The key finding of the housing needs analysis is that Salem has a surplus of land for single-family detached housing types and a deficit of about 207 acres of land in the Multi-Family Residential plan designation. Salem’s options for addressing this deficit include:

- **Redesignate or rezone land to MF.** Salem’s biggest opportunity to address the deficit of Multi-Family land will be through redesignating land from SF (or possibly DR) to MF. Evaluate tools to increase redevelopment activity and mixed-use development. Salem’s primary redevelopment opportunities are in commercial areas or redeveloping industrial areas, with opportunities for mixed-use development that includes multi-family development.
- **Increase opportunities for development of multi-family housing types.** Salem can allow a wider range of lower-density multi-family housing types (such as duplexes or townhouses) in single-family zones. Salem may be able to increase multi-family housing development by making it easier to build multi-family housing, through simplifying the planned unit development process or creating alternative ways to comply with the City’s design standards.
- **Monitor and report on multi-family development activity and land sufficiency.** The City should monitor and report on the deficit of multi-family land, track land redesignations and rezonings, and monitor multi-family development. Monitoring can help the City understand the market demand for multi-family and other housing types, allowing the City to better respond to the market.

Comprehensive Plan Designations with residential capacity

- Developing Residential (DR)
- Single-Family Residential (SF)
- Multi-Family Residential (MF)
- Mixed-Use (MU)
- River-Oriented Mixed-Use (ROM)

Residential zoning districts

- Residential Agriculture (RA)
- Single Family Residential (RS)
- Duplex Residential (RD)
- Multiple Family Residential (RM)
- High Rise Multiple Family Residential (RH)



The Housing Needs Analysis concluded that Salem has a surplus of land for single-family detached housing and a deficit of land for single-family attached and multi-family housing. The recommendations for housing policy changes and implementation strategies focus on increasing capacity for attached and multi-family housing to address the identified land deficiency. While the full Implementation Strategy documents present recommendations both for revisions to Salem’s Comprehensive Plan policies and Implementation Strategies to address the multi-family land deficit, this section focuses on the Implementation Strategies.

Implementation Strategies

Addressing Salem’s deficit of approximately 207 acres of land for multi-family housing and demonstrating compliance with Goal 10 will require increasing the amount of land available for multi-family development. The Advisory Committee recommends that decision makers consider a range of ways to address the deficit of multi-family land.

Strategies to allow attached housing in single-family zones:

Implementing Measure 1.1: Explore allowing duplexes outright in single-family zones (SF and RA zones) on any lot of 7,000 square feet or more.

Implementing Measure 1.2: Explore allowing townhouses as permitted uses in single-family zones (SF, RA, and RD zones) or explore revising special use standards and minimum lot sizes to make it easier to develop townhouses.

Implementing Measure 1.3: Explore allowing tri- and four-plexes outright in single-family zones (SF, RA, and RD zones) on corner lots of 7,000 square feet or more.

Redesignate or Rezone Land for Multi-family Development

Implementing Measure 1.4: Identify opportunities to redesignate or rezone land from single-family uses to multi-family uses. The process should result in city-initiated plan amendments and zone changes to address the multi-family land deficit.

Lowering Barriers to Multi-family Housing Development

Implementing Measure 2.1: Develop a menu of options of pre-approved design standards for multi-family housing that allow developers to select preferred design elements. The design standards should be flexible, ensure quality design that fits with community standards, and present clear and objective standards. If the developer selects at least the minimum number of design elements from the menu, the proposal would not need to go through the public hearing process.

This measure includes developing menus of pre-approved design standards for tri-plex and four-plex units and for smaller multi-family buildings with five to ten units that allow developers to select preferred design elements.

HOUSING POLICY CHANGES AND IMPLEMENTATION STRATEGIES

Implementing Measure 2.2: Revise the Planned Unit Development regulations to permit more flexibility about development standards (such as setbacks), allowing for development of more affordable housing. The revisions should allow more flexibility in the process, decrease the complexity of the process, and increase the speed of the process.

Implementing Measure 2.3: Evaluate opportunities to decrease parking requirements for tri-plex and four-plex units and for small multi-family structures with five to ten units.

Identify opportunities to Increase Redevelopment Activity

Implementing Measure 3.1: Identify and evaluate tools to increase redevelopment activity by using tools such as reduced systems development charges for redevelopment projects or the vertical housing tax credit for mixed-use development.

Increase Opportunities for Development of New Affordable Housing

Implementation Measure 4.1: Develop, adopt, and implement affordable housing policies based on an affordable housing strategy that articulates the City's vision and goals for affordable housing. The affordable housing strategy should be implemented through policies, strategies, and specific actions.

Implementing Measure 4.2: Develop an Accessory Dwelling Unit (ADU) Ordinance that allows ADUs in appropriate zoning designations.

Implementing Measure 4.3: Develop different development standards for existing homes in older, established neighborhoods in order to decrease the need for adjustments and variances.

Process Steps

The policies and implementation strategies proposed in this project will require additional work. The Advisory Committee recommends that the City Council direct staff to develop a work program to implement these strategies.



Economic Opportunities Analysis: Introduction

The Economic Opportunities Analysis provides necessary information for managing Salem's commercial and industrial land base to support the City's vision for economic development.

Salem's Economic Opportunities Analysis provides information to support economic development planning and management of Salem's commercial and industrial land. It provides the City with information about Salem's economy and the city's role as the primary employment center in the Mid-Willamette Valley and the southern outpost of the Portland regional economy.

The Economic Opportunities Analysis is intended to comply with Statewide Planning Goal 9, which directs cities to plan for economic growth. Within the context of Goal 9, the Economic Opportunities Analysis is an analysis of the community's economic patterns, potentialities, strengths, and deficiencies as they relate to state and national trends. It focuses on the comparative advantage of the city when planning for major commercial and industrial development. The Analysis includes extensive analysis of Salem's commercial and industrial land base to determine how much land is vacant or partially vacant.

The result of the Economic Opportunities Analysis is an estimate of land needed to accommodate the forecast of commercial and industrial employment growth for the 2015-2035 period.

City staff and ECONorthwest staff worked with an Advisory Committee to review these results and to provide input for policy changes to address land deficits, most notably in land needed for commercial uses, and to manage high value industrial lands.

PRODUCTS OF THE ECONOMIC OPPORTUNITIES ANALYSIS



Salem's Vision for Economic Development

The City's broad economic development goal is to attract and retain jobs to increase the economic prosperity for Salem residents and businesses.¹ The City's approach to accomplishing this goal is to:

- Implement an economic development strategic plan that focuses on the role of the City and other partners to create jobs and encourage economic growth.
- Attract higher density employment to downtown.
- Attract companies to the Mill Creek Corporate Center and Salem Renewable Energy and Technology Center by marketing both sites.

The City's strategies for accomplishing this goal are:

- **Stay and Grow in Salem.** This strategy protects Salem's existing economic base by helping to expand and grow existing businesses and by diversifying the traded-sector businesses in Salem to support existing companies. This strategy will require Salem (and regional partners) to invest in infrastructure improvements, ensure that Salem has the right mix of land for development, provide incentives and a range of financial resources for economic development, and to support and invest in economic development partners.
- **Rely on Strengths of Regional Partnerships.** The City will continue to emphasize regional partnerships to provide a full range of economic development services. The City will continue to work with local partners to retain and recruit businesses, provide utilities, prepare the workforce, and develop property. In addition, the City will collaborate with its partners on the availability of land and infrastructure development to support job creation.
- **Grow Small Businesses.** The City will support growth of small businesses through programs such as the Fairview Loan Program or by helping businesses make connections to other partners. The City will continue to diversify Salem's economy and increase local prosperity through growth of businesses in new and existing clusters and by focusing on growth of businesses in key target industries.
- **Attract New Businesses.** Available development-ready and other buildable land at the Mill Creek Corporate Center and Salem Renewable Energy and Technology Center will attract businesses that are considering locating in Salem or the Willamette Valley.



¹The information in this section is summarized from the memorandum "Citywide Economic Development Strategy Development" dated December 7, 2012 from John Wales (Director of Urban Development) to the City Council.

Factors Affecting Economic Growth in Salem

Employment in Salem grew faster than the national average.

Growth in service-oriented sectors outpaced other employment, especially manufacturing.

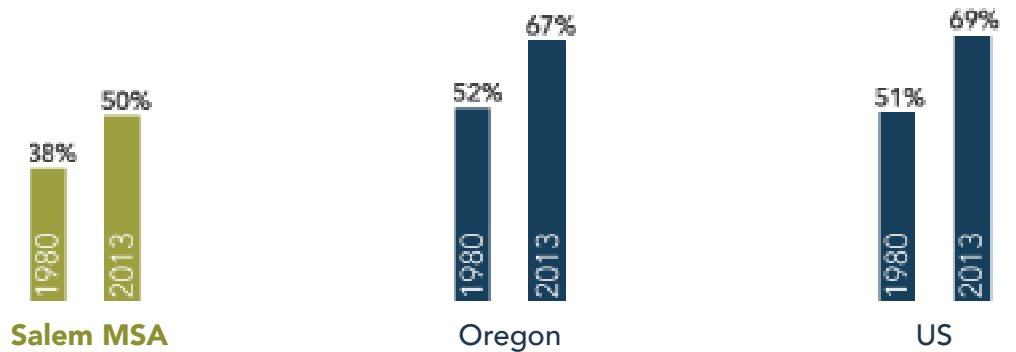
Unemployment rates in Marion and Polk counties are generally higher than the national average.

Salem's economy and employment will grow as a result of growth in the national and regional economy, as well as factors in Salem's local area. The following are key trends that have implications for economic growth in Salem.

Employment in Marion and Polk counties grew at 1.3% between 1990 and 2013, adding more than 40,000 jobs. In comparison, employment grew at 0.9% annually in the U.S. and 1.3% in Oregon over the 23-year period.

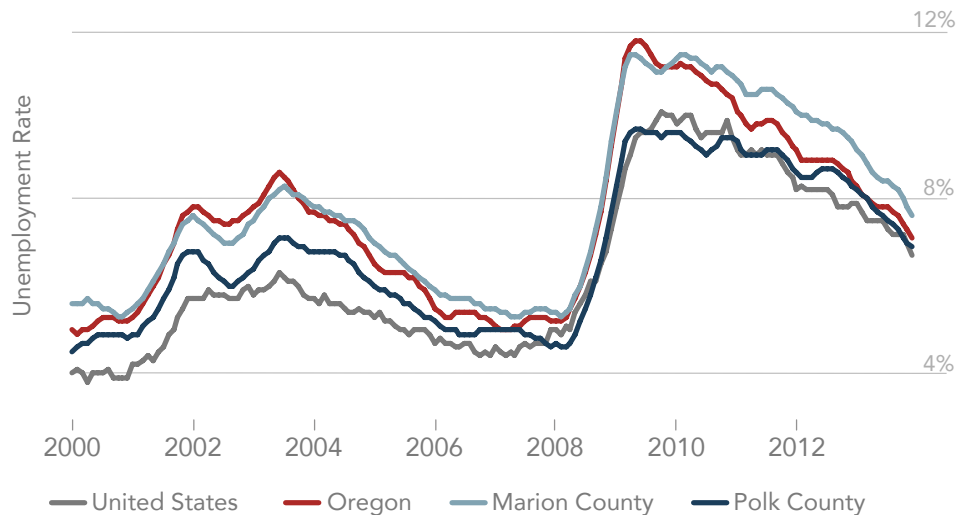
CHANGE IN PERCENTAGE OF EMPLOYMENT IN SERVICE ORIENTED SECTORS, 1980 AND 2013

Source: US Bureau of Labor Statistics



UNEMPLOYMENT RATE, 2000 - 2013

Source: US Bureau of Labor Statistics



FACTORS AFFECTING ECONOMIC GROWTH IN SALEM

AVERAGE ANNUAL PAY, 2012

Source: Oregon Employment Department: Oregon Labor Market Information System

\$42,298
Salem

\$38,060
Marion Co.

\$31,298
Polk Co.

\$44,229
Oregon

\$49,289
US

AVERAGE NUMBER OF EMPLOYEES IN PRIVATE BUSINESSES, 2011

10.7
Salem

11.0
Oregon

PERCENTAGE OF PRIVATE BUSINESSES WITH 100 OR FEWER EMPLOYEES, 2011

71%
Salem

41%
Oregon

The majority of businesses in Salem have 100 or fewer employees.

COMMUTING PATTERNS IN SALEM, 2012

53,000

People commute into Salem to work

29,800

People live and work in Salem

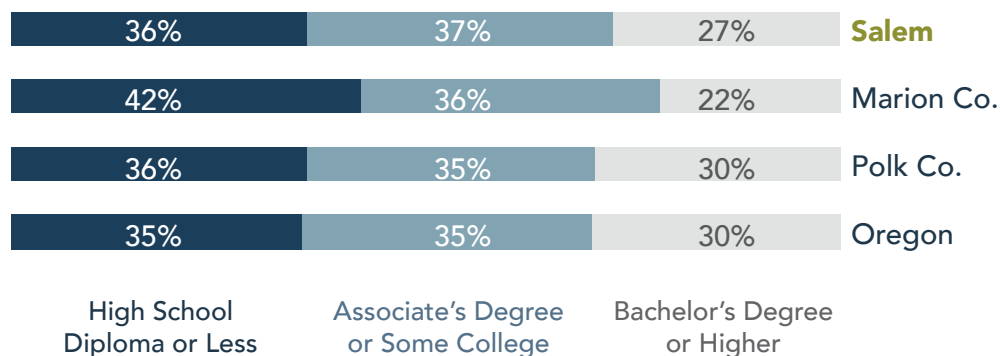
24,700

People live in Salem and work elsewhere

Salem is a regional economic center.

Sixty-four percent of Salem's workers commute into Salem. This is similar to other large cities in the Willamette Valley.

EDUCATIONAL ATTAINMENT, PERCENT OF THE POPULATION AGE 25 AND OVER, 2012



Employment in Salem

In 2012, Salem had more than 92,000 covered employees² at nearly 6,500 businesses and other employers. Salem's average employer size was 14 employees per employer. The majority of employees in Salem were in the following sectors: Government (30%), Health Care and Social Assistance (15%), Retail (11%), Accommodation and Food Service (8%), and Manufacturing (6%).

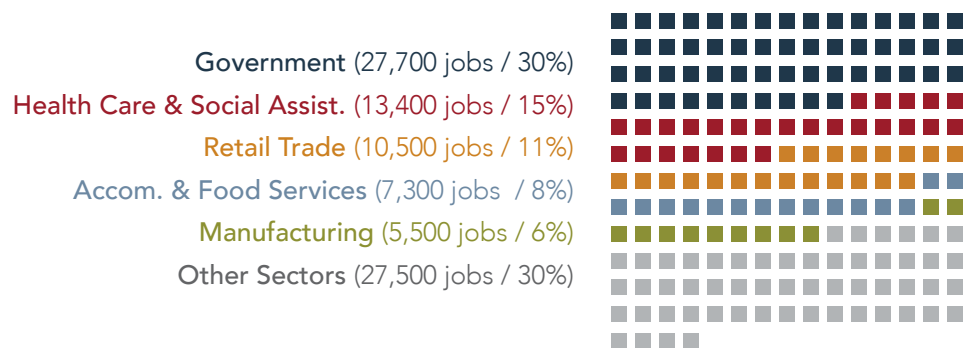
Government is the largest employer in Salem.

Thirty-percent of Salem's workforce is in Government, with 19% of the workforce in State Government.

JOB BY SECTOR OF FIRM, SALEM, 2012

1 square represents 500 jobs.

Source: Oregon Employment Department, Quarterly Census of Employment and Wages

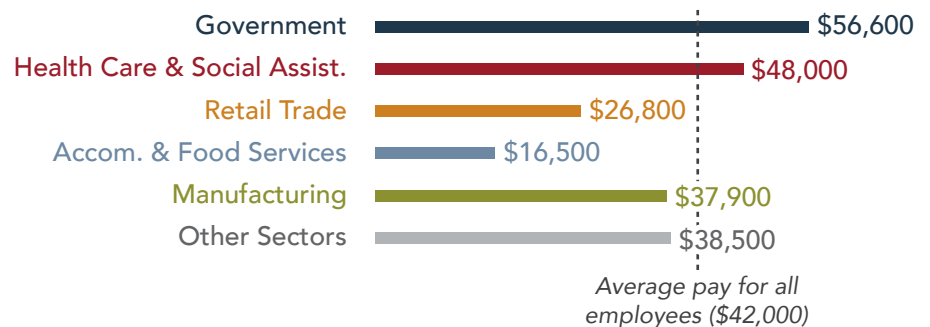


The average pay per employee in Salem was about \$42,000 in 2012. Government and Healthcare and Social Assistance had the highest average pay, and they also are the sectors that account for the most jobs in Salem. Accommodations and Food Services, Retail Trade, and Manufacturing had below-average pay.

Government and Healthcare have higher than average pay in Salem.

AVERAGE PAY BY SECTOR OF FIRM, SALEM, 2012

Source: Oregon Employment Department, Quarterly Census of Employment and Wages



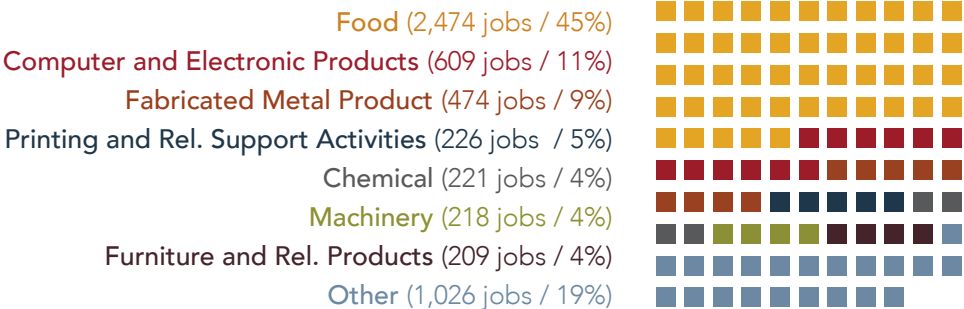
²Covered employment is employment covered by unemployment insurance. Covered employment does not include all workers in an economy. Most notably, covered employment does not include sole proprietors. Analysis of data shows that covered employment reported by the Oregon Employment Department for Marion and Polk counties is only about 77% of total employment reported by the U.S. Department of Commerce. While this analysis includes only covered employment, the employment forecast is based on an estimate of total employment in Salem.

The majority of manufacturing employment in Salem is in Food Products manufacturing, with an average pay per employee of nearly \$32,000, which is below the city average pay per employee. The average pay in other manufacturing industries, such as Computer and Electronic Products or Fabricated Metal Products is higher than Salem’s average pay.

The national average pay in other manufacturing sectors, such as Technology, Equipment, Chemical, or Specialty Metals, are above Salem’s average pay per employee.

MANUFACTURING JOBS, SALEM, 2012

1 square represents 50 jobs.
 Source: Oregon Employment Department, Quarterly Census of Employment and Wages

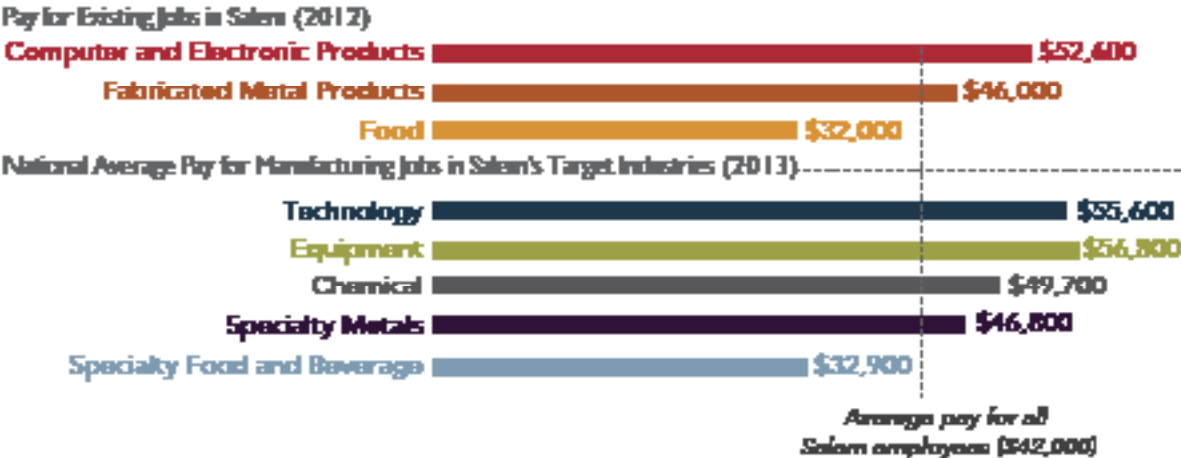


Nearly half of Salem’s manufacturing jobs are in Food and Beverage Manufacturing, which has lower than average pay.

Salem’s vision for economic development is growth of traded-sector industries, most with higher than average pay. Examples include technology manufacturing, computer and electronic product manufacturing, or equipment manufacturing. Salem’s economic development vision focuses on growing existing and new traded-sector businesses in key industries, such as food and beverage processing, and other complementary industries.

PAY IN SELECTED EXISTING MANUFACTURING SECTORS IN SALEM, 2012 AND 2013

Source: Oregon Employment Department, Quarterly Census of Employment and Wages, and the US Bureau of Labor Statistics



Salem's Competitive Advantages

Economic development opportunities in Salem will be affected by national, state, and local economic conditions. Economic conditions in Salem relative to these conditions in other portions of the Willamette Valley form Salem's competitive advantages for economic development. Salem's competitive advantages have implications for the types of firms most likely to locate and expand in the area.

There is little that metropolitan area jurisdictions can do to influence the national and state conditions that affect economic development, though they can influence local factors that affect economic development. Salem's primary competitive advantages are:

- **Location.** Salem is located in Marion and Polk counties, on Interstate I-5, less than an hour south of Portland. Salem is one of Oregon's largest cities. Businesses in Salem have access to natural resources from surrounding rural areas, such as agricultural products, lumber, and other resources.
- **Transportation.** Businesses and residents in Salem have access to a variety of modes of transportation, but the most important is I-5. Businesses that need relatively easy automotive access to I-5 and other major roads in the region may be attracted to Salem.
- **Presence of State government.** Salem is the capital of Oregon, and about 27,700 State government jobs are located in Salem. State government offers a range of employment opportunities, from jobs requiring highly skilled employees to jobs requiring little formal education.
- **Quality of life.** Salem's quality of life attributes include: cultural amenities, shopping opportunities, and access to outdoor recreation. Salem's high quality of life is likely to attract businesses and entrepreneurs that want to locate in a high-amenity area.
- **Labor market.** Businesses in Salem have access to highly educated skilled workers, nearby college students, and unskilled workers. Commuting patterns show that businesses in Salem are able to attract skilled and unskilled workers living within Salem and from the Willamette Valley and Portland Metropolitan Region.
- **Public policy.** The City can impact economic growth through its policies about the provision of land and redevelopment. Businesses may choose to locate in Salem (rather than in a different part of the Willamette Valley) based on: development charges, availability of public infrastructure, and attitudes towards businesses.



Salem's Target Industries

Salem's comparative advantages will affect the types of businesses most likely to locate in Salem. Target industries were identified based on research about a wide range of potential target industries that might be appropriate for Salem. The list was then narrowed down, based on in-depth research about the viability of target industry development in Salem and focusing on industries that meet the City's economic development goals and complement the City's competitive advantages.

Salem's economic development policy is to assist existing companies to grow and expand within Salem. The industries with existing concentrations of employment in either traded-sector or higher-than-average wages are:

- **Food and beverage manufacturers.** Food and beverage manufacturing is Salem's largest existing manufacturing industry.
- **Medical services.** Employment in medical services will grow with population growth to the extent that Salem continues to offer medical services not available in surrounding areas.
- **Government services.** Salem will continue to be a center for government jobs, especially for jobs in State Government.

Salem identified the following traded-sector industries as target industries. Growing and attracting businesses in these industries will strengthen Salem's manufacturing businesses, increasing the share of employment in manufacturing industries. Most of these industries have incomes above Salem's average, with national averages for employment in these sectors ranging from \$46,000 to \$57,000.

- **Technology manufacturing**, such as manufacturers of renewable energy equipment, avionics, and medical devices.
- **Equipment manufacturing**, such as manufacturing of equipment for: recycling machinery, construction machinery, farm equipment, semiconductor machinery, and other machinery used by businesses in Salem and the broader Willamette Valley.
- **Specialty metal manufacturing**, such as ornamental metal manufacturers, prefabricated metal structures, structural metal, bolt and washer manufacturing, and other specialty metal manufacturing.
- **Specialty food and beverage manufacturing.** Salem's existing concentration of food and beverage manufacturing make it attractive to other food and beverage manufacturers. Salem has opportunities to grow and attract food manufactures of all types and sizes.
- **Chemical manufacturing**, such as manufacturing of chemicals for coatings, glass, films, plastics, and concrete.



Commercial and Industrial Buildable Land in Salem

Definitions

Buildable employment land: Unconstrained suitable vacant and partially-vacant land designated for employment development.

Vacant land: Unconstrained suitable land designated for employment development.

Partially vacant land: Unconstrained suitable land with existing employment development that could support additional employment development.

Constrained land: Land that is not available for development based upon one or more factors such as environmental protections or lands committed for public use.

Suitable land: Vacant or partially vacant land without development constraints that could be developed during the 20-year planning period.

Plan Designations:

Employment Center (EC)

Industrial (IND)

Industrial Commercial (ID)

Commercial (COM)

CB is Central Business District

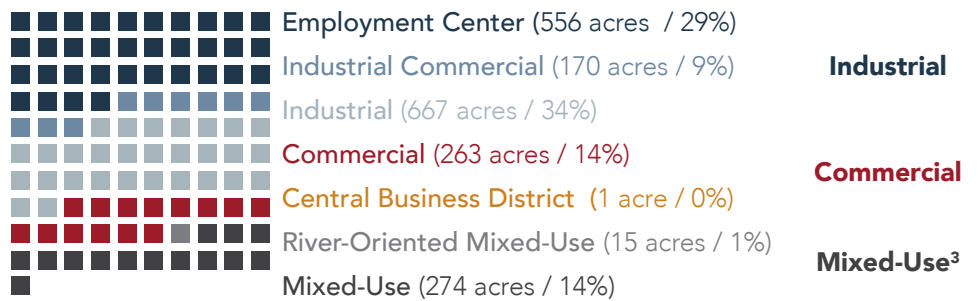
River-Oriented Mixed-Use (ROM)

Mixed-Use (MU)

Salem has 1,945 acres of vacant and partially vacant land in Comprehensive Plan designations. Nearly 1,400 acres of Salem’s vacant land is in industrial designations, with about 265 vacant acres in commercial designations and nearly 290 acres in mixed use designations.

SUITABLE ACRES IN VACANT AND PARTIALLY VACANT TAX LOTS BY PLAN DESIGNATION, SALEM UGB, 2014

1 square represents 1% or 19.5 acres of total vacant land
Source: ECONorthwest analysis of City of Salem GIS data



Nearly half of Salem’s employment land is in sites larger than 20 acres. The majority of this land is in industrial areas. Salem’s supply of large industrial sites is unique within the Willamette Valley, making Salem attractive to traded-sector employers who need large sites.

LOT SIZE BY PLAN DESIGNATION, SUITABLE ACRES, SALEM UGB, 2014

Source: ECONorthwest analysis of City of Salem GIS data

Smaller than 5 acres



5 to 20 acres



Larger than 20 acres

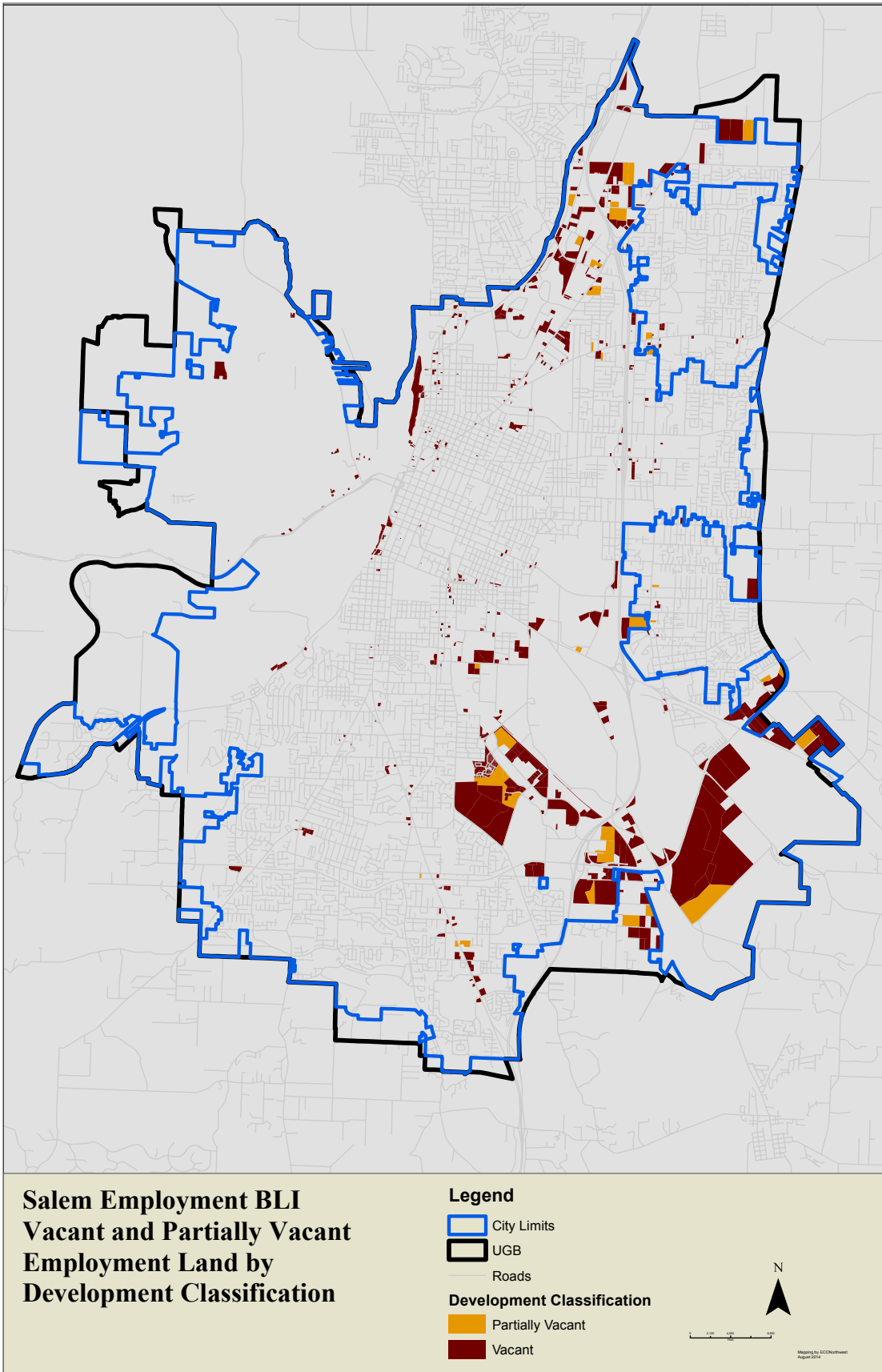


Industrial / Commercial

1 square represents 30 suitable acres

³The “Fairview Training Center Redevelopment Master Plan” shows 21 acres of capacity for office, retail, and commercial industrial development in MU, as documented in the EOA report.

BUILDABLE COMMERCIAL AND INDUSTRIAL LAND



Forecast of Employment Growth and Land Sufficiency

Salem's employment is forecast to grow at the same rate as its population, 1.25% per year.

The rate at which Salem's employment base grows over the next 20 years will affect development of new commercial and industrial buildings and demand for employment land. Salem's employment forecast assumes that employment will grow at the same rate as population growth, at 1.25% average annual per year. This assumption is appropriate, as Salem is the regional employment and commerce center.

Employment growth will result in demand for 1,114 acres of land.

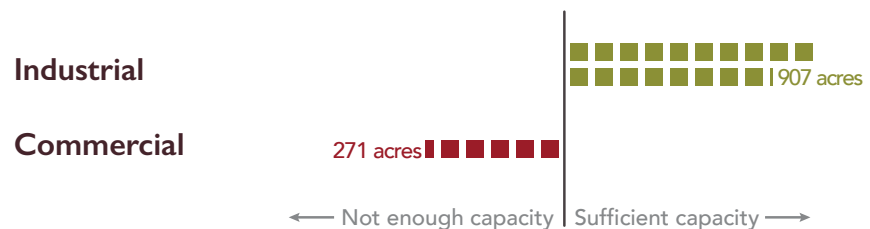
FORECASTED DEMAND FOR LAND TO ACCOMMODATE EMPLOYMENT, 2015-2035



Salem has a 271-acre deficit of land for commercial uses.

Salem has a enough land to accommodate industrial growth over the next 20 years, but there is a 271-acre deficit of land for expected commercial growth. The City can address the commercial land deficit by: zoning land for retail uses in or near neighborhoods, encouraging the redevelopment of existing commercial areas, encouraging higher density office or mixed-use development in downtown or other employment areas, or by redesignating some lands to commercial designations.

While Salem has more industrial land than it will need to accommodate expected industrial growth over the next 20 years, the employment forecast assumes that industrial employment will grow at the same pace as population. Salem's economic development strategy, however, envisions that Salem will grow or attract more traded-sector employees than have historically located in Salem. The majority of these employees would be in manufacturing and would require industrial land.



Short Term Land Supply and Redevelopment

Short-term land supply

Goal 9 requires Salem to assess the short-term supply of land based on the criteria that land can be ready for construction within one year. Cities must provide at least 25 percent of the total land supply within the urban growth boundary designated for industrial and other employment uses as short-term supply.

About 510 acres (26%) of Salem's vacant and partially vacant employment land is either ready for development or could be serviced within one year. These lands include: about 176 acres of land on sites State Certified as development-ready (in the Mill Creek Corporate Center and the Salem Renewable Energy and Technology Center), about 160 additional acres in the Mill Creek Corporate Center, about 80 acres at the Salem Municipal Airport, and about 95 acres in the Fairview Urban Renewal Area.

Redevelopment

Salem is encouraging redevelopment of underutilized employment areas in a number of ways. Salem has seven urban renewal areas (URA), each of which has an urban renewal plan to facilitate redevelopment, including identifying financial tools to facilitate redevelopment. The majority of land in the urban renewal areas has existing development, with the exception of the Mill Creek Corporate Center. As a result, most new development in these areas will be redevelopment of underutilized areas.

Outside of the urban renewal areas, Salem can expect modest redevelopment of industrial areas. The most likely types of redevelopment are reuse of existing buildings. Salem staff has seen increasing interest in reuse of existing industrial buildings, both for industrial uses and for commercial or other uses. Salem's limited supply of suitable vacant industrial buildings limit opportunities for re-use.

Redevelopment occurs when achievable rents exceed the current return on investment of the land and improvements. Salem's deficit of commercial land makes redevelopment of underutilized land or commercial buildings with relatively low improvement value more likely.

Analysis of building and land values of developed commercial and industrial areas suggests that Salem may have between 50 and 100 acres of employment land redevelop between 2015 to 2035. Land located in urban renewal areas is more likely to redevelop than land outside of urban renewal areas because of the infrastructure improvements and redevelopment tools available in the urban renewal districts. Redevelopment could help address the deficit of commercial land.

Salem's Site Needs for Target Industries

Salem's economic development vision and goals envision growth of traded-sector target industries, mostly in manufacturing industries. One of the key factors that businesses consider when making decisions about where to locate is the availability of sites that meet the needs of their business. The following is a summary of the characteristics of sites needed by Salem's target industries in manufacturing.



- **Site size.** Site size is important to general industrial users because the site needs to be large enough to accommodate the needed built space, storage space, parking, on-site circulation, transportation access and circulation, and must provide space for future expansion. Business Oregon finds that competitively sized general manufacturing firms have sites 10 acres in size (High-tech or campus industrial manufacturing have 25 acres.)
- **Land ownership.** Businesses in Salem's target industries need sites with two or fewer owners to reduce the cost and uncertainty of land assembly that can make developing an industrial site with multiple land owners financially infeasible.
- **Automotive access.** Manufacturing buildings are generally located on arterial or major collector streets. Business Oregon finds that manufacturing and industrial firms need to be located relatively close to an interstate highway or principle arterial road. Traffic from the industrial development should not be routed through residential neighborhoods.
- **Topography.** Industrial buildings require flat sites to reduce costs and offer maximum flexibility. Business Oregon finds that competitive sites for high tech manufacturing and campus industrial generally have a slope of 5% or less.
- **Access to services.** Industrial buildings require access to municipal water, municipal sanitary sewer, and electricity/gas. Developing a site with direct access to municipal services is substantially more cost-effective than extending municipal services to an unserved site. Business Oregon finds that competitive sites must have access to urban services, including water, wastewater, natural gas, electricity, and major telecommunications facilities.
- **Surrounding land uses.** Industrial uses are generally compatible with other industrial uses, commercial uses, agricultural uses, and some public uses. Noise or odor conflicts may make some industrial uses incompatible with nearby residential uses.

High Value Industrial Land

High value industrial land has unique characteristics, making it highly desirable for manufacturing and other traded-sector employment. High value industrial land has the following characteristics: it is designated for industrial uses, it is in flat parcels (most frequently in large parcels at least 10 acres in size), is located within surrounding compatible industrial and other uses, has direct access to a state highway or I-5, and is serviced or planned to be serviced with water and wastewater infrastructure. Table 1 presents a list of high-value industrial sites in Salem, including their key characteristics and why it is important to preserve these sites for industrial uses.

Table 1. High value industrial land, Salem portion of the UGB, 2014

Site Name	Key Characteristics	Why it is Important to Preserve for Industrial Uses
Mill Creek Corporate Center	<p>Mill Creek has about 488 acres of relatively flat vacant land available for development. About 136 acres of this area is serviced and development ready.</p> <p>The City expects the majority of land in the Mill Creek Corporate Center to be development ready over the planning period as upgrades to public infrastructure is completed.</p> <p>The Mill Creek Corporate Center is within two miles of I-5 and adjacent to Highway 22, providing excellent transportation access.</p> <p>It is owned by the State of Oregon, who is interested in seeing development happen there.</p>	<p>The Mill Creek Corporate Center accounts for about one-third of vacant suitable industrial land in Salem.</p> <p>The City of Salem and the State of Oregon have invested millions in infrastructure and wetland mitigation, with the expectation that the area will develop for traded-sector uses.</p>
Salem Renewable Energy and Technology Center	<p>This property has about 48 total acres; 40 of which are certified development ready. It is adjacent to Highway 22 and near Interstate 5. The property is zoned Industrial Business Campus for manufacturing uses. It is owned by the City of Salem.</p>	<p>There are a broad range of sites available adjacent to Panasonic and a PGE substation, with easy access to critical transportation routes.</p>
North Gateway Urban Renewal Area and North Salem	<p>This area has about 140 acres of relatively flat vacant or partially-vacant land. There are a variety of zones and uses throughout the area. It is near a significant transportation route to Portland and features a long-term concentration of industrial and manufacturing businesses.</p>	<p>This area has transportation access and a significant cluster of manufacturing and industrial uses.</p>
McGilchrist Urban Renewal Area	<p>This area is comprised of about 40 acres of relatively flat vacant land. This area has a long term concentration of industrial and manufacturing uses.</p>	<p>This area is the site of future URA and transportation investments and has a concentration of industrial businesses.</p>
Fairview Urban Renewal Area	<p>The Fairview Urban Renewal Area consists of 390 acres of mixed industrial properties, with a range of vacant lots available. There is quick access to Highway 22 and the Salem Airport.</p>	<p>Millions were invested in public infrastructure and wetland mitigation in this area. There is a significant concentration of a broad range of industrial businesses.</p>
West Salem Urban Renewal Area	<p>This area has a variety of lot sizes, zones, and uses, access to Highway 22 and Wallace Road, and a concentration of long term industrial employers.</p>	<p>There is a concentration of long term industrial employers and accessibility in this area.</p>
North Downtown Area	<p>The North Downtown has a variety of lot sizes, zones, and uses, access to downtown Salem, and a concentration of long term industrial employers.</p>	<p>There is a concentration of long term industrial employers in this area.</p>
Salem Airport	<p>The Salem Airport has 80 acres of unconstrained vacant or partially vacant land. It is a cargo, business, aviation technology, and personal airplane node. There is quick transportation access to Interstate 5 and Highway 22 and a concentration of industrial employers.</p>	<p>The airport is a cargo, business, and personal airplane node that generates hundreds of millions in economic benefits for the region. Federal, State, and City investments in infrastructure will continue to support a range of transportation options in the area and support area businesses.</p>

Policy Changes and Implementations

The Economic Opportunities Analysis concluded that Salem has a deficit of 271 acres of land designated for commercial uses. Salem has more industrial land than is expected to develop over the 2015 to 2035 period. Much of that industrial land is high value industrial land where the City has made substantial investments in infrastructure. The following are recommendations from the Advisory Committee for revisions to Salem's Comprehensive Plan policies and Implementation Strategies to address these issues.

Salem's deficit of commercial land will require a variety of approaches to resolve.

Some commercial land need may be addressed through targeted conversion of industrial land that is not well-suited for future industrial uses. Commercial land need may also be addressed through rezoning land in residential areas to create appropriately scaled neighborhood shopping areas. Redevelopment will play an important role in addressing the commercial land deficit.

Salem's industrial land base is unique within the Willamette Valley.

Few cities in Oregon have an industrial land base with the employment potential of Salem's industrial land.

Commercial Implementation Strategies

Addressing Salem's deficit of land for commercial uses will require increasing land available for commercial development.

Implementation Measure 1.1: Identify targeted areas for potential conversion to commercial uses, such as office uses, businesses that need flex space, and other types of employment with wages near-to or higher-than the State's average wage. The areas targeted for conversion should be ones where commercial uses are impinging on industrial activity and areas that are less well-suited for future industrial uses. These changes should be implemented to allow continuation of existing industrial uses.

Implementation Measure 1.2: Establish one or more neighborhood or convenience shopping and service centers in West Salem, to provide retail and other services to people living in West Salem.

Implementation Measure 1.3: Establish one or more neighborhood or convenience shopping and service centers in residential areas, especially in developing residential areas.

Implementation Measure 1.4: Make the mixed-use zone and overlays simpler and easier to use, possibly reducing the number of mixed-use zones or overlays and making the design standards simpler and more consistent across mixed-use areas.

Industrial Implementation Strategies and Revised Goals

These strategies and goals will help the City manage the base of high value industrial land. The Advisory Committee recommends that the City make changes to the City's existing Comprehensive Planning policies for management of the City's industrial land.

Revised Policy 1: Industrial Land Inventory. Maintain a long-term (20 year) industrial land inventory that provides a full range of small, medium, and large parcel sizes and locations to sustain a competitive market

EMPLOYMENT LAND POLICY CHANGES, IMPLEMENTATION STRATEGIES

for industrial sites. Maintaining a long-term supply of industrial land will require identifying and preserving key high value industrial land, especially areas where the City has made substantial investments in infrastructure. High value industrial land has the following characteristics: it is designated for industrial uses, is in flat parcels, is most frequently in large parcels at least 10 acres in size, is located within an industrial district, has direct access to a state highway or I-5, and is serviced or has plans to be serviced with water and wastewater infrastructure.

New Policy: Industrial Land Inventory. Identify areas that may be appropriate for converting from industrial to commercial or other non-industrial uses over the long-term. The characteristics of industrial land that may be appropriate for conversion to commercial or other non-industrial uses include some or all of the following: (1) located outside of industrial areas or isolated from other industrial uses; (2) surrounded by incompatible uses (such as housing); (3) located adjacent to properties that have converted to commercial uses; (4) have limited or no access to major roads (such as arterial streets, collector streets, or highways); or (5) lacks rail access.

New Policy: Short-term industrial land supply. Ensure a sufficient short-term supply of serviced industrial land that is suitable for construction within one year of application for a building permit or request for service extension.

New Policy: Industrial Land Inventory. Monitor and report on the supply of industrial land and conversions to commercial uses on an annual basis, to ensure a long-term and short-term supply of industrial land.

Several of the Implementation Strategies for managing industrial land in Salem echo the suggested changes to Salem's Industrial land policies (and are not presented in this document).

Implementation Measure 2.1: Identify industrial areas to preserve for large-scale industrial uses such as (but not exclusive to) the target industries. These areas may be in single large parcels or a collection of mid-sized adjacent parcels, preferably with two or fewer owners.

Economic Development Policies

The Advisory Committee recommends revisions to existing Economic Development Policy 3, which provides a list of actions that the City should take to promote economic development. City staff should incorporate these and other appropriate actions into a strategic plan for economic development.

Revised Policy 3: Economic Development Functions. The Community Development and Urban Development Departments should work together to develop an economic development strategic plan. The plan should list strategies and actions that the City will take over the next one to five years to implement the City's economic development vision. Each action will identify the lead entity responsible for the action, the resources necessary for the action, and a target timeline for the action.

Salem should identify key industrial areas for long-term preservation where public infrastructure investments have been made or are planned.

High value industrial land in Urban Renewal Areas, such as McGilchrist, Fairview, and North Gateway, are the types of areas that Salem should preserve for future industrial uses.

Salem should develop an economic development strategic plan that identifies specific actions, including resources and a schedule to implement the actions.

Acknowledgments

ECONorthwest and the City of Salem thank the many people who helped develop the Salem Housing Needs Analysis and Economic Opportunities Analysis.

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