

AGENDA

Is Oregon Future Ready?

15th Oregon Leadership Summit

December 4, 2017

Oregon Convention Center

Plenary Session

Oregon's Fiscal Challenge Today; Where Technology Is Taking Us Tomorrow

9:00 AM: Presentation of Colors, National Anthem, sung by Without Apology: Tommy Jones, Michael McDonald, Riley Lakos, Ryan Fox-Lee, Josh McAtee, Joel Stover, Bailey Butts, Dan Upshaw, Elis Madrigal, Russel Brown, and Ty Givens

9:05: Welcome and Introduction, Patrick Criteser, CEO, Tillamook County Creamery Association; Oregon Business Plan Chair

9:10 AM: "On Your Feet" Audience Participation Exercise

9:20 AM: Federal Issues Affecting Oregon, Views from the U.S. Senate, Debbie Kitchin, Co-Owner of Interworks, LLC interviews Senators Ron Wyden and Jeff Merkley

9:45 AM: Oregon Business Plan Update, Patrick Criteser

10:00 AM: What's at Stake in Oregon's Budget Crisis? Patrick Criteser leads a discussion with community partners: Denny Doyle, Mayor of Beaverton; Melissa Cribbins, Coos County Commissioner; Cheri Helt, Bend School Board; Kali Thorne Ladd, PCC Board Chair and Executive Director of Kairos PDX; Toya Fick, Executive Director, Stand for Children

10:30 AM: A United Voice for Oregon Business, Debbie Kitchin interviews Oregon Business and Industry President Mark Johnson and Board Chair Sam Tannahill on their vision for the newly formed business organization and its role in helping Oregon address some of the state's big challenges, including the budget crisis

10:45 AM: Achieving Bipartisan Legislative Wins, Jessica Gomez, CEO of Rogue Valley Microdevices, leads a discussion with Senators Lee Beyer and Brian Boquist, and Representatives Cliff Bentz and Caddy McKeown on how Oregon was able to achieve bipartisan success on transportation and what lessons can be learned for addressing the state's budget crisis

11:10 AM: "On Your Feet" Audience Participation Exercise: What is your advice for Governor Brown when it comes to addressing the State's budget crisis?

11:25 AM: Governor Kate Brown, Looking Ahead, Patrick Criteser interviews the Governor on her priorities for 2018 and beyond

11:45 AM: Break for Lunch

12:20 PM: The Future of Technology and Its Implications for Work, the Economy, and Society, address by Steve Brown, the Bald Futurist

12:50 PM: Are Robots Going to Take Our Jobs? Which Ones? What Can We Do About It? Bank of America Regional Market Executive Chris Swindell interviews Economist John Tapogna, President, ECONorthwest, on his recent study of the next wave of automation; its likely impact across Oregon industries, regions, and populations; and how we can plan for it

1:05 PM: Can Oregon Lead on the Next Wave of Technology? Jessica Gomez explores this question in a panel interview with Young Kim, CEO of Digital Harvest and co-founder of Oregon's

Unmanned Aerial System Future Farm; Ed Feser, Provost, Oregon State University; and Chris Harder, Director, Business Oregon

1:25 PM: Plenary Session Wrap-up, Patrick Criteser

1:35 PM: Breakout Session Preview, Linda Schott, President, Southern Oregon University; Nico Larco, Co-Director, Sustainable Cities Initiative, University of Oregon; Bryce Olson, Global Marketing Director, Health and Life Sciences, Intel

Afternoon Breakout Sessions

2:00-3:15 PM: Round 1: Getting Ready for Next-Wave Technology (see details, following pages)

3:45-5:00 PM: Round 2: Advancing the Four Ps for Prosperity (see details, following pages)

5:00-6:00 PM: Reception featuring wine from Dusky Goose and A to Z Wineworks, and beer from Chetco Brewing Company and Thunder Island Brewing Company

Round 1 Breakouts: Getting Ready for Next-Wave Technology (2:00-3:15)

The first session of breakouts will explore the implications of future technology in the five key areas below. These sessions will be led by expert facilitators from “On Your Feet” to actively engage the audience on the implications of rapid technological change on the five selected topics. Experts will spark the conversation, then it is up to you. Please come prepared to explore the possibilities, connect with fellow Oregonians, and prepare for the future ahead!

The Future Economy (E141-144)

With the coming wave of artificial intelligence, machine learning, advanced robotics and other technologies, what will Oregon’s economy look like in 10 years? What are the opportunities for Oregon industries to take advantage of the accelerating pace of technological change? What are the risks? And how do we make sure that everybody is included in the new economy?

- Matt Abrams, General Partner, Seven Peaks Ventures
- Juan Barraza, Program Manager, PSU Center for Entrepreneurship
- Sabrina Parsons, CEO, Palo Alto Software
- Laurent Desegur, Vice President, Customer Experience Engineering, Walmart Labs

The Future of Economic Mobility and the Social Safety Net (E145/146)

How can we redesign our social safety net to provide Oregonians with the support and resources to thrive in the face of dramatically changing workplaces and job requirements?

- John Tapogna, President, ECONorthwest

The Future of Learning (D135/136)

What knowledge and skills will Oregonians need to prosper in a world of automation and continuous change? How will technology change the availability, delivery, assessment, and credentialing of education and training?

- Linda Schott, President, Southern Oregon University

The Future of Transportation (D137-140)

How quickly are autonomous vehicles coming? How will they reshape our communities? What should we be doing to prepare and take full advantage of the opportunity?

- Jennifer Dill, Interim Vice President for Research, Director, Transportation Research and Education Center, Portland State University
- Nico Larco, Associate Professor, Co-Director, Sustainable Cities Initiative, University of Oregon

The Future of Health Care (F150/151)

What are the forces that will shape the future delivery of health care? What are the best opportunities for Oregon to get in front and lead in this transformation?

- Bryce Olson, Global Marketing Director, Health and Life Sciences, Intel Corporation

Round 2 Breakouts: Advancing the Four Ps for Prosperity (3:45-5:00)

The “Whole Story” of Oregon’s 2017 Wildfires (D136)

Oregon’s fire season was one of the costliest in memory. Thick smoke blanketed our state for days, disrupting events, school days, business operations and more. Wildfire blocked access to Oregon tourism destinations, forced travelers to alter or cancel plans, and hurt Oregon’s lodging and restaurant businesses. More than 700,000 acres of wildfire spewed particulate and other hazardous compounds, diminishing air quality for everyone, but especially the 1.5 million adults and children considered most vulnerable. Post-fire communities now face landslides, flooding, diminished water quality and altered habitat. The panel will engage the audience in a discussion of whether this is the “new normal” and what constructive steps we can take to mitigate fire’s impacts.

- Paul Barnum, Executive Director, Oregon Forest Resources Institute (moderator)
- Mark McMullen, Oregon State Economist
- Christine Drazan, Executive Director, Oregon’s Cultural Advocacy Coalition
- Ann Thomas, Public Health Physician, Center for Public Health Practice
- Caroline Park, President, Thunder Island Brewing, Cascade Locks
- Dr. John Bailey, OSU College of Forestry
- Representative David Brock-Smith, House District 1

Land Access and Transition Challenges Facing Oregon’s Farmers and Ranchers (F150)

With the creation of the Oregon Agricultural Heritage Program (OAHP), Oregon has taken an important step to help farm and ranch owners work through the costs and complications of intergenerational transfer. Funds were authorized by the Legislature to get OAHP organized, but there is much work ahead on behalf of Oregon’s working landscape owners. Most working farms and ranches are still locally owned, but most families don’t have access to the capital it takes for a generational property transfer. The average age of Oregon farmers is 60. Over the next generation more than 10 million acres – 64 percent of Oregon’s agricultural land – will change hands. Meanwhile, land costs are rising at an alarming rate. Such barriers pose challenges not only to the next generation of farmers, but also to a growing pool of women and people of color who want to become farmers. This breakout will focus on two aspects of these challenges: accessing flexible and affordable capital, and paying Oregon estate taxes and other liabilities.

- Nellie McAdams, Rogue Valley Farms (facilitator)
- Bryan Harper, Owner, Harper Farms
- Jared Gardner, Rancher, Nehalem River Ranch
- Andrea Krahmer, Relationship Manager/AVP NW Farm Credit Service
- Alex MacKay, Director of Business Development and Industrial Relations, Iroquois Valley Farms
- State Senator Bill Hansell, Senate District 29
- State Representative Brad Witt, House District 31

Why Can't We Get Big Rural Water Infrastructure Developed? (E146)

As part of the last Summit, we challenged Oregon leaders to support an effort to prioritize investing in rural Oregon's water infrastructure. In 2017 we sponsored two economic analyses of water infrastructure investments – one in the mid-Columbia watershed, the other on the north fork of the Santiam River. Using these case studies, and one recently completed in the Yakima Basin in Washington, this panel will discuss the challenges facing the planning, development, and construction of water infrastructure projects in rural Oregon. Audience members will help define specific challenges related to water infrastructure investments, identify obstacles preventing stakeholders from planning and building projects, and discuss concrete steps they could take to find solutions that work across stakeholder groups.

- Sybil Ackerman, Executive Director, Ackerman-Munson Strategies (facilitator)
- Julie O'Shea, Executive Director, Farmer's Conservation Alliance
- Danielle Gonzales, Management Analyst, Marion County Community Services
- Ed MacMullan, Senior Economist, ECONorthwest
- J.R. Cook, Executive Director, Northeast Oregon Water Association
- State Representative Cliff Bentz, House District 60
- State Representative Karin Power, House District 41

Yes in My Back Yard (YIMBY)! Building More Housing Units in Urban, Suburban and Rural Oregon (E141/142)

Whether you live in Portland, Beaverton, Bend, Coos Bay, or Baker City, one of the most pervasive constraints to economic growth facing Oregon is the lack of available, affordable, and quality housing for a growing workforce. While there are many factors contributing to Oregon's housing woes, the root of the crisis is limited supply. Oregon has underbuilt its housing supply by 155,000 units over the past 15 years. To catch up and ease the relentless upward pressure on home purchase and rental prices, Oregon needs to build at least 30,000 units per year over the next 20 years – up from 17,000 per year today. This session will explore how we can make that happen in urban, suburban and rural communities. Representatives from ECONorthwest and Holland Government Affairs will share their research and a policy framework for making it happen. Leaders who are working to bring more units on line in Oregon communities will share the initiatives they are pursuing and the challenges they face.

- Drake Butsch, Builder Services Manager, First American Title (facilitator)
- Mike Wilkerson, Senior Economist, ECONorthwest
- Josh Lehner, Senior Economist, Oregon Office of Economic Analysis
- Mike Kingsella, Executive Director, Oregon LOCUS; Government Affairs Manager, Holland Partner Group
- Kelly Ritz, President, Stone Bridge Homes NW, LLC
- Jason Lewis-Berry, Director, Regional Solutions and Economic Policy Advisor to Governor Kate Brown
- Sarah Beaubien, Sr. Dir. Stewardship & Farm Engagement, Tillamook County Creamery Association
- State Representative Alissa Keny-Guyer, House District 46

Preparing for the Future – Oregon's Carbon Reduction Efforts (F151)

Oregon produces .70% of total carbon emissions in the United States. But how did we get here? During this breakout, you will hear an overview of Oregon's carbon reduction policies, including laws and regulations that have been in place as well as future policies that are going to be implemented. As we consider the future of Oregon's carbon reduction efforts, it's important to understand the impact to Oregon businesses and how they have successfully, or have had difficulty, adapting to regulatory and policy changes. You will hear from three business representatives who have successfully navigated the

challenge of reducing carbon emissions. A third presenter will review efforts that other states have made to reduce carbon emissions and provide insight into the complexity of options available in this policy sector.

- Mike Freese, Lobbyist, Oregon Business & Industry (facilitator)
- Tom Plant, Senior Policy Advisor, The Center for the New Energy Economy
- Fawn Bergen, Global Sustainability Manager, Intel
- Scott Bolton, Senior Vice President, External Affairs and Customer Solutions, PacifiCorp

Sparking Innovation in Health and Health Care (D139/140)

The Oregon Business Plan Health Strategy has played an integral role in health reform in Oregon over the last decade. Oregon has maintained momentum for health system reform which has generated significant outcomes. Almost 95 percent of Oregonians now have health insurance coverage and 60 percent have their care coordinated through patient-centered primary care homes. Oregon has relatively low rates of avoidable hospitalizations, and avoidable emergency room visits have decreased with the rise in access to primary care. Oregon has improved in the Gallup Well-Being Index rankings, moving to 24th in 2016 from 31st in 2015. The data is irrefutable that higher quality, less costly preventative care and care management have been paying off in Oregon. However, with our growing state fiscal crisis, uncertainty at the federal level, and continued health insurance cost pressures on employers, it is important to revisit the strategy and discuss areas of opportunity on the Business Plan's three policy pillars: 1) insurance coverage, 2) quality improvement and cost reduction, and 3) upstream and social determinants of health. This breakout will provide a variety of perspectives on the strategy and where to focus next.

- Mark Ganz, CEO, Cambia Health Solutions (facilitator)
- Patrick Allen, Director, Oregon Health Authority
- Gayle Evans, Senior Vice President, Chief Human Resources Officer, Unitus Credit Union
- Leticia Valle, Board Member, Columbia Gorge Health Council; Community Program Manager, The Dalles Blue Zone Project
- John Kitzhaber, MD

Getting Oregon's Products to Market (E143/144)

The 2017 Transportation Package contains significant investments designed to diversify the manner in which Oregon manufacturers and producers get their products to market. From access roads to the anticipated Oregon Manufacturing Innovation Center (OMIC) to laying the foundations for product consolidation and reload facilities in Albany-Millersburg and Malheur County, the Transportation Package holds the promise to change the way Oregonians engage in local, regional, national, and international commerce. This breakout will discuss a number of the investments contained in the Package; what it means for rural businesses and how it will affect the overall landscape in Oregon for trade. Panelists will include affected business leaders in the Mid-Willamette Valley and Malheur County.

- Greg Smith, President, Greg Smith and Company (facilitator)
- Grant Kitamura, CEO, Baker and Murakami Produce
- James Ramseyer, Albany-Millersburg Economic Development Corp.
- Shelly Boshart Davis, V.P. International Sales, Boshart Trucking/Bosscos Trading, LLC
- Paul Langner, Waterfront Facilities Manager, Teevin Brothers
- State Representative Caddy McKeown, House District 9

Allowing Employers Flexibility to Manage Employees and Benefits to Maintain a Productive and Safe Workforce (E145)

Oregon employers are facing challenges from recently implemented employment laws as well as

concerns about future mandates. Besides managing the full impact of the Paid Sick Time law and ongoing minimum wage increases, many companies will soon be dealing with new predictive scheduling requirements and the challenges involved in implementing the new Pay Equity law. On top of these issues, employers are concerned about the potential for additional workplace leave mandates and increases in workers' compensation premiums. Panelists will discuss the ways they are meeting these challenges, as well as the implications of additional costs and mandates that may be proposed in the 2018 session. This breakout will also look at the need to preserve programs such as the Workers' Compensation System and the integrity of the State Accident Insurance Fund that work well for employers and employees as currently structured.

- Amy Angel, Partner, Barran Liebman LLP (facilitator)
- Dylan Wells, Owner, Autumn Harvest, Inc.
- Steve Ferree, Owner, Mr Rooter Plumbing of Portland
- Dee Burch, President, Advanced American Construction, Inc.
- Greg Astley, Director of Government Affairs, Oregon Restaurant & Lodging Association

Adult Talent and Workforce Development (D135)

The Legislature has asked the Higher Education Coordinating Commission to work with the workforce development system to develop a vision and goals for adult education and workforce development. These goals will guide policy and funding across the community college, higher education, and workforce development system. This session will examine the strategies and innovations required to prepare our workforce for the future economy and the changing nature of work. It will outline the issues and processes the HECC will explore in setting adult education goals and showcase employer-driven strategies for talent development that connect those goals to employer need.

- Ben Cannon, Executive Director, Higher Education Coordinating Commission (moderator)
- Eileen Boerger, Former Chair, Oregon Talent Council
- Jessica Gomez, President & CEO, Rogue Valley Microdevices; Rogue Workforce Partnership
- Skip Newberry, President & CEO, Technology Association of Oregon
- Preston Callicott, CEO, Five Talent Software

Future Ready Learning Through CTE-STEM (D137/138)

Oregon must prepare its learners for a rapidly changing and increasingly uncertain future. CTE and STEM education engage and motivate learners, lead to strong academic outcomes, and prepare learners for success in college, careers, and life. Oregon has made much progress in elevating and investing in CTE and STEM education. Despite the momentum, there is still much to do. This session will focus on the opportunity ahead to reimagine how we work together to prepare more learners for the future. Successful models of career connected learning will highlight the impact of public-private partnerships and the role we can all play in building engagement and support for CTE and STEM education.

- Mark Lewis, CTE-STEM Policy Director, Chief Education Office (moderator)
- Jim Piro, President & CEO, PGE; Chair, Oregon STEM Investment Council
- Kimberly Howard, Education Initiatives, PGE; Member, Oregon State Board of Education
- Elevate Lane County: Matt Sayre, Director Southern Willamette Valley, TAO
- Innovate Dayton: Jami Fluke, Principal, Dayton High School Principal
- Pipeline to Jobs: John Damon, Senior VP Manufacturing, Oregon Freeze Dry
- STEM Beyond School: Kristen Harrison, Director, Portland Metro STEM Partnership; & Kiyuuna Williams, SUN Site Manager, IRCO