

A scenic photograph of an Oregon landscape at sunrise. The sun is low on the right horizon, casting long, golden rays across a misty valley filled with dense evergreen forests. In the background, a large, snow-capped mountain peak rises against a clear blue sky with wispy clouds. The overall mood is peaceful and hopeful.

# THE LONG GAME

How can we shape our economic strategy  
for the coming decade and beyond  
to lift up all Oregonians in shared prosperity?

**17<sup>TH</sup> OREGON LEADERSHIP SUMMIT**  
**DECEMBER 16, 2019**

**Welcome to the 17<sup>th</sup> Oregon Leadership Summit.** As Oregon transitions from the teens to the twenties in this young century, it's a good time to consider the longer term challenges and opportunities ahead for our people and economy. Hence this year's theme, *The Long Game*.

**So how are we doing as we step into the next decade?** Compared to ten years ago, quite well. Along with the nation we stand at 11 years of unprecedented expansion that's buoyed Oregon businesses and families. Unemployment has dropped to near historic lows, creating more job opportunities for everyone and driving up wages. Our median household income reached the national median for the first time in decades and per capita income topped 93 percent of the U.S. average, a level we haven't seen since the late '90s. More Oregonians have health insurance now than ever before. One of the strongest revenue recoveries in the nation gives us record public resources. (See inside back cover for progress indicators.)

**Yet things could be better.** Communities of color as well as rural and low-income Oregonians face stubborn inequities in opportunity. Families increasingly feel the crunch of housing shortages and rising housing costs, which, in turn, make it harder for businesses across the state to attract and retain employees. Congestion frustrates commuter and freight movement across Oregon's metro regions while insufficient transportation infrastructure isolates key parts of the state. Despite strong job growth, Oregon still lost share of national traded-sector employment, and our average traded-sector wage lags the nation. On per capita income, we have a long way to go to reach the Business Plan goal of matching the national average.

**Disruptive change complicates our efforts.** Breakthrough technologies are beginning to alter everything from how we live and get around to what we do at work and how we do it. Advances in fields such as artificial intelligence, 3D printing, and robotics promise big opportunities and even bigger challenges.

**This Summit initiates a reset.** Over the course of 2020, the Oregon Business Plan will work with regional, industry, and community partners to answer the questions highlighted at right. Then we'll return to next year's Summit with some answers and a refreshed strategy to pursue a new decade of shared prosperity in Oregon.

**I look forward to working with you on this endeavor.**



**Joth Ricci**  
Oregon Business Plan Chair

## How do we ensure that prosperity is broadly shared?

*Among Oregonians from all communities, backgrounds, and regions*

## How do we improve our economic competitiveness?

*In cluster performance, trade, technology innovation, infrastructure, land, and regulatory policy*

## How do we adapt to a radically different future of work?

*Meeting stronger education attainment goals, adapting to new technologies, preparing for artificial intelligence*

## How do we grow yet protect and enhance our quality of life?

*In greater housing supply and affordability, in reduced congestion*

## How do we adapt to a changing climate while sustaining economic progress?

*In natural resources, agriculture, urban design, and energy consumption*

## THE LONG GAME

17<sup>th</sup> Oregon Leadership Summit  
December 16, 2019  
Oregon Convention Center

## AGENDA



### Plenary Session

- 8:30 a.m. Presentation of the Colors, National Anthem, The Brown Sisters**
- 8:35 a.m. Framing the Day – What Are the Key Questions for Oregon’s Long Game?**  
Patrick Criteser, President & CEO, Tillamook County Creamery Association  
Joth Ricci, President, Dutch Bros. Coffee
- 8:50 a.m. Federal Issues – What’s in the Offing?**  
Senator Ron Wyden  
Senator Jeff Merkley  
Interviewed by Ruth Williams-Brinkley, President, Northwest, Kaiser Foundation Health Plan and Hospitals
- 9:15 a.m. Trade – How Can Oregon Benefit from a Growing Global Economy?**  
Senator Ron Wyden  
Interviewed by Roger Hinshaw, Market President at Bank of America and the Region Executive for Global Commercial Bank
- 9:30 a.m. Economic Update – How Are We Doing?**  
John Tapogna, President, ECONorthwest  
David Williams, Policy Director, Opportunity Insights
- 10:00 a.m. Shared Prosperity – How Do We Make our Economy Inclusive?**  
Rukaiyah Adams, Chief Investment Officer, Meyer Memorial Trust  
Anne Kubisch, President, The Ford Family Foundation  
Carmen Rubio, Executive Director, Latino Network  
Mark Witty, Superintendent, Baker School District  
Moderator Ron Saxton, Executive Vice President & General Counsel, PeaceHealth
- 10:30 a.m. Break**
- 10:45 a.m. Where Is Artificial Intelligence Leading Us?**  
Lama Nachman, Intel Fellow, Director of Artificial Intelligence Lab, Intel Corporation
- 11:00 a.m. What’s in the Future for Manufacturing?**  
Shane Wall, Chief Technology Officer & Global Head of Labs, HP Inc.
- 11:15 a.m. How Is Big Data Shaping Health and Health Care?**  
Danny Jacobs, President, Oregon Health and Science University
- 11:30 a.m. What Does the Future of Work and Learning Hold?**  
Stefan Bird, President & CEO, Pacific Power  
Katrina Hull, Educator, McKay High School  
Isabel Mejia, Student, McKay High School, Lemelson-MIT InvenTeams  
Lesly Rojas, Student, McKay High School, Lemelson-MIT InvenTeams  
Alex de Verteuil, Doctoral Student, University of Oregon
- 12:00 p.m. Lunch Break**
- 12:30 p.m. What Are the Priorities Ahead for Oregon?**  
Governor Kate Brown  
Interviewed by Joth Ricci
- 12:50 p.m. What’s Next for Housing?**  
Speaker of the House Tina Kotek  
Interviewed by Cort O’Haver, CEO, Umpqua Bank
- 1:05 p.m. What Are the Big Challenges Facing Oregon?**  
Senate President Peter Courtney  
Interviewed by Karen Vineyard, Market Executive for Bank of America’s Global Commercial Bank

**1:20 p.m. What Are the Big Challenges for the Decade Ahead?**

House Republican Leader Christine Drazan

Interviewed by Vanessa Sturgeon, CEO, TMT Development

**1:35 p.m. What's the Rural Perspective on Oregon's Economic Challenges?**

Representative Caddy McKeown

Representative Lynn Findley

Interviewed by Dan Thorndike, Corporate Counsel, Corporate Secretary, Medford Fabrication

**1:50 p.m. Break**

**2:00 p.m. How Can We Manage Our Forests Better to Reduce Fire, Protect the Environment, and Boost the Economy?**

Matt Donegan, Chair, Oregon Wildfire Response Council

**2:15 p.m. How Can We Better Manage Finite Water Resources?**

Martin Doyle, Director, Water Policy Program, Nicholas Institute for Environmental Policy Solutions

**2:30 p.m. How Can We Innovate to Reduce Carbon and Grow Our Economy?**

Mark Edlen, Co-Founder and Chairman, Gerding Edlen

Bruce Daucavage, President, Ochoco Lumber Company

Pam Barrow, Vice President of Energy, Environmental & Sustainability, Food Northwest

Anna Chittum, Director of Renewables, NW Natural

Moderator Sandra McDonough, President & CEO, Oregon Business & Industry

**3:00 p.m. What's the Outlook for Electric Mobility?**

Maria Pope, President & CEO, Portland General Electric

John O'Leary, Sr. Vice President & CFO, Daimler Trucks

Doug Kelsey, General Manager, TriMet

**3:30 –**

**5:00 p.m. Breakout Sessions (with Room Numbers)**

**(F151) The Future of Manufacturing – How can our firms innovate to gain global competitive advantage in the decade ahead?**

Oregon has a strong manufacturing base and our growth in manufacturing jobs outpaces the nation. Our manufacturing extends across many sectors, encompassing metals, transportation equipment, forest products, semiconductors, and more. Innovation in manufacturing is a constant, and this session will explore how Oregon can build on our strengths in this regard. What could we do to raise Oregon's game in competitive manufacturing? What will it take in workforce enhancement, policy engagement, and state and federal investment?

**Senator Betsy Johnson**, (D-Scappoose)

**Kimberly Medford**, General Counsel, ENTEK International

**Dr. Nagi G. Naganathan**, President, Oregon Institute of Technology

**Marv Nelson**, Executive Vice President & Chief Operating Officer, A-dec, Inc.

**Dr. Harriet B. Nembhard**, Eric R. Smith Professor of Engineering and head of the School of Mechanical, Industrial, and Manufacturing Engineering (MIME), Oregon State University

**(E141-E144) Building a Pipeline to Economic Mobility – How can education, business, health care, government, philanthropy, and community-based organizations work together to improve economic mobility in Oregon's communities?**

Oregon has joined with Opportunity Insights, a national organization led by Harvard Economist Raj Chetty, to explore how to improve economic mobility and reduce disparities in communities across Oregon. David Williams, Policy Director of Opportunity Insights (OI), will present a high-level overview of the Opportunity Atlas, describe OI's current thinking on the characteristics of high-mobility neighborhoods, and introduce a framework to organize education-related and community-level interventions to support economic mobility.

**Ron Saxton**, Executive Vice President & General Counsel, PeaceHealth (moderator)

**David Williams**, Policy Director, Opportunity Insights

**Max Williams**, President & CEO, Oregon Community Foundation

**Mark Witty**, Superintendent, Baker School District



**(D137-D140) Connecting Oregonians with Careers – What will it take to increase access and completion in postsecondary education?**

Education beyond high school – apprenticeships, technical degrees, undergraduate, graduate, and professional degrees – unlock promising careers for Oregonians. As our economy evolves to take advantage of the growing power of artificial intelligence, well-paying jobs will require increasing levels of knowledge and skills. Oregonians need greater access to postsecondary opportunities than ever before. In collaboration with universities, community colleges, and other postsecondary partners, the Higher Education Coordinating Commission is launching a year-long initiative to develop a strategy and funding plan to dramatically increase the levels of access and completion by Oregonians in education programs beyond high school. In this session HECC Executive Director Ben Cannon will describe the plan, followed by reflections and discussion among key stakeholders on this important work.

**Ben Cannon**, Executive Director, Higher Education Coordinating Commission (HECC)

**Representative Christine Drazan** (R-Canby)

**Representative Barbara Smith Warner** (D-Portland)

**(D135-D136) Housing – Are we on the path to build 30,000 new units per year?**

Insufficient housing supply in Oregon constrains both human potential and economic growth. Oregon has underbuilt its housing supply by 155,000 units over the past 15 years. To catch up, we need to build 30,000 units per year for the next 20 years. This is a 50 percent increase over the 20,000 units constructed over the past three years. The 2019 Legislature took significant steps in addressing this challenge with the passage of HB 2001, which creates more opportunities for duplexes and fourplexes, and HB 2003, which will establish housing construction goals and plans by communities. This session will explore how this legislation, along with other policies, can put us on track to increase the supply and variety of housing.

**Jodi Hack**, CEO Oregon Home Builders Association (moderator)

**Jeremy Rogers**, Director of Public Policy and Legal Affairs, Oregon Association of REALTORS® (moderator)

**Mike Wilkerson**, Partner and Senior Economist, ECONorthwest

**Palmer Mason**, Senior Policy Advisor, Oregon Department of Land Conservation and Development

**Kim Travis**, Housing Integrator, Oregon Housing and Community Services

**Justin Wood**, Vice President, Fish Construction NW, Inc., 2019 OHBA President

**Deborah Flagan**, Vice President of Community Engagement and Giving, Hayden Homes

**Kenny Asher**, Community Development Director, City of Tigard

**Eric King**, City Manager, City of Bend

**(F150) Global Trade – How can we support Oregon companies in reaching growing global markets?**

When it comes to international trade, Oregon continues to punch above its weight. International trade supports one-fifth of all jobs in Oregon and underpins our economy. Jobs connected to trade pay more and are three times more productive, contributing to the health and resiliency of our economy. Oregon's location along the Pacific Rim offers efficient transport of goods via air, water, rail, and road to national and international markets. In this session, participants will learn about how global trade uncertainties and tariffs are impacting our state's economy and what we can do to foster a healthy trade environment in our state.

**Curtis Robinhold**, Executive Director, Port of Portland (moderator)

**Steve Miller**, CEO, Bulk Handling Systems (BHS)

**Maria Ellis**, Executive Director, Pacific Northwest International Trade Association

**Austin Peterson**, Director of Parts and Services, SSI Shredding Systems, Inc.

**Todd Davidson**, CEO, Travel Oregon

**Macey Wessels**, Co-owner, Boshart Trucking, Inc./BOSSCO Trading

**John Tapogna**, President, ECONorthwest

**(continued overleaf)**

**(D133-D134) Forest Health – How can we manage our forests to reduce wildfires, increase ecological health, and support communities?**

Governor Kate Brown's Wildfire Response Council assembled over 100 leaders and wildfire experts from across the state and, in November 2019, produced a comprehensive wildfire strategy following nearly a year of intensive analysis. The conclusion: without action, Oregon faces tens of billions of dollars of damage from wildfire affecting public health and ecological and community vitality. A holistic, sustained strategy will mitigate these risks and create much needed jobs in rural Oregon. Council chair Matt Donegan and other Council members will present a compelling case for action.

**Matt Donegan**, Chair, Oregon Wildfire Response Council (moderator)

**Sally Russell**, Mayor, City of Bend

**Nils Christofferson**, Executive Director, Wallowa Resources

**Mariana Ruiz-Temple**, Chief Deputy State Fire Marshal, Office of State Fire Marshal (OSFM)

**Senator Jeff Golden**, (D-Ashland)

**Mark Stern**, Forest Program Manager, The Nature Conservancy

**(E147) Water – How do we prepare to manage water to meet our ecological, economic, and community needs over the decades ahead?**

Meeting Oregon's varied water management needs into the future is one of the most important issues facing our state. This challenge will require bridging traditional divides, whether urban-rural, residential-commercial, or business-environmental. Duke University professor and national water expert Martin Doyle will lead a panel of Oregonians involved in water policy and management. Panelists will discuss the future of Oregon's water, drawing upon examples of the many water issues facing the state and the innovative solutions starting to emerge.

**Martin Doyle**, Director, Water Policy Program, Nicholas Institute for Environmental Policy Solutions (moderator)

**Danielle Gonzales**, Marion County Economic Development

**Dan Thorndike**, Corporate Counsel, Corporate Secretary, Medford Fabrication

**David Yamamoto**, Commissioner, Tillamook County

**Mark Owens**, Hay Farmer, Commissioner, Harney County

**Direlle Calica, J.D.**, Director of the Institute for Tribal Government, Hatfield School of Government, Portland State University; Policy Advisor, Affiliated Tribes of Northwest Indians

**(E145-E146) Access to Capital – How do we ensure greater inclusiveness?**

Oregon is blessed with a growing number of women and people of color starting and expanding businesses in all corners of our state. Unfortunately, there are significant disparities in access to capital for these entrepreneurs and business owners. In his session panelists will identify and discuss those barriers and participants will strategize ways to address them.

**Monica Enand**, CEO and Co-founder, Zapproved

**Maura O'Neill**, Lecturer and Distinguished Teaching Fellow, Hass School of Business, UC Berkeley

**Lynn Le**, Founder, Society Nine

**Stephen Green**, Founder, PitchBlack

**5:00 p.m. Reception**

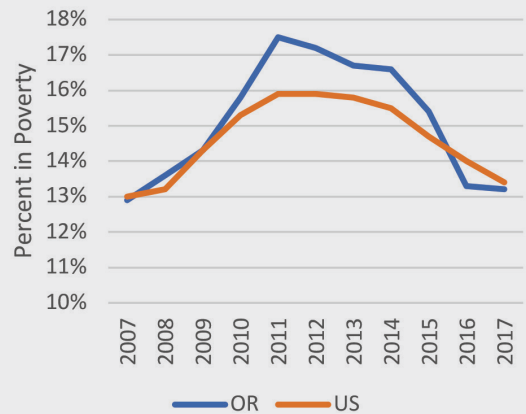
## Progress on Oregon Business Plan Goals Since 2010

GOAL	ACTUAL	GOAL ACHIEVED?
Job Growth — 25,000 Net New Jobs Per Year	37,000 Per Year	✓
Per Capita Income — 100% of National Average	93% (2018)	More to Do
Poverty — Less Than 10% of Oregonians Living Below the Poverty Line	13.20% (2017)	More to Do

### Incomes Have Risen



### Poverty Has Fallen



## Other Important Progress Indicators Since 2010

	2010 (Last Business Plan Refresh)	MOST CURRENT YEAR (2017 Unless Otherwise Noted)
<b>Household Performance</b>		
Median Household Income as % of US Median	93.0%	99.8%
Median Household Actual (Not Adjusted for Inflation)	\$46,560	\$60,212
<b>Indicators of Economic Performance</b>		
Average Traded Sector Wage (% of US)	84.40%	90.9%
Traded Sector Employment (Share of US)	1.22%	1.16%
<b>Education and Health Care</b>		
40-40-20 (25-34 Year Olds)		
% w/ HS or Higher	88%	92%
% w/ AA or Higher	38%	45%
% w/ BA or Higher	30%	37%
High School Graduation Rate (4-year Cohort)	66%	78.7% (2018)
STEM Degree Production	11,494	18,464 (2016)
STEM Certificates and Associates Degrees	3,110	4,427
STEM BA's and Post-Baccalaureates	8,384	14,037
Health Insurance Coverage	82.70%	93.20%
<b>Public Finance</b>		
	2009-2011 Approved Budget In Millions	2019-2021 Adopted Budget In Millions
General & Lottery Fund Resources	\$14,234	\$23,669
Budgetary Reserves	\$16	\$1,758

## GOLD



## SILVER



## BRONZE

