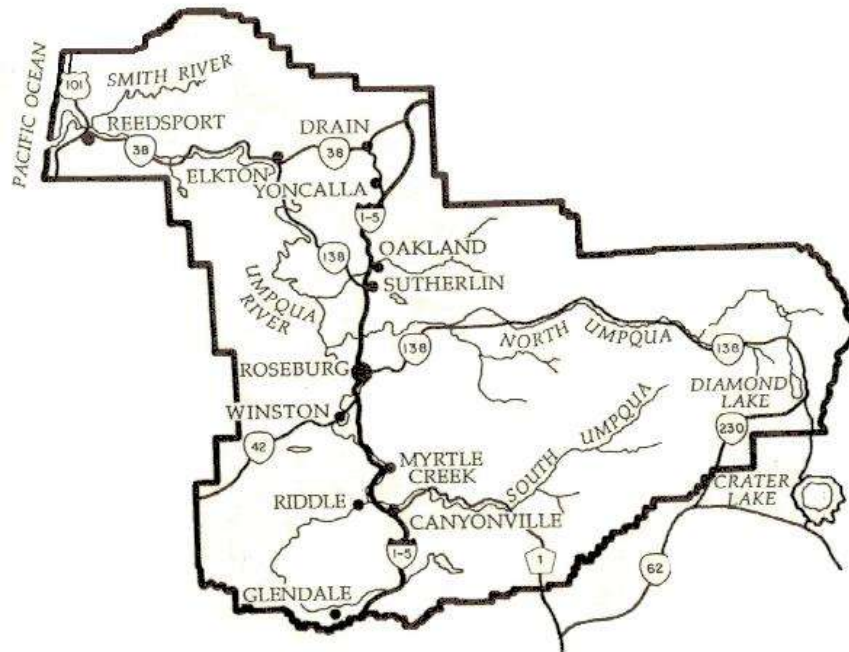


DOUGLAS COUNTY TELECOMMUNICATIONS & TECHNOLOGY STRATEGIC PLAN

"Building a better Douglas County by connecting to the world!"



Prepared By:
John Irwin
and the

Roseburg Area Chamber of Commerce Telecommunications Subcommittee

Sponsored By:



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PREFACE

The Roseburg Area Chamber of Commerce Telecommunications subcommittee sponsored the development of this Douglas County Telecommunications Strategic Plan (see Appendix 1 for the full committee membership). The importance of collaborating and cooperating across many sectors of Douglas County is demonstrated in the process and outcome of this planning effort. This planning process commenced in November of 2001 with the acquisition of a consultant to help facilitate the process.

The strategic planning process is outlined in the Scope of Services (see Appendix 2) and is summarized here.

“Working with selected members of the Roseburg Area Chamber of Commerce, Telecommunications Subcommittee John Irwin, Informatics Consultant, will facilitate and participate in a strategic-planning process for telecommunications for Douglas County, comprised of three parts:

- I A needs assessment,
- II Goal setting to address the most critical issues, and
- III The crafting of an appropriate action plan.”

The strategic plan is consistent with and supports the Regional Investment Board’s (RIB) vision to:

"To create economic and community development opportunities and to build quality communities throughout the region."

This plan strongly supports stated regional planning components, as follows:

- An expanded base of small businesses that diversify the economy and increase the total employment within the region. Business expansions and recruitment efforts that have resulted from public/private partnerships and the successful promotion of the benefit of small-town locales.
- Sound public works infrastructure that addresses the region's needs for adequate water supply, treatment of wastewater and disposal of solid waste.
- Facilities and events that make the region a significant attraction for residents and tourists with emphasis on nature-based tourism, heritage tourism and tourism destinations.
- Participation in new communications technology and information systems.
- A workforce system that links education and skill development with jobs that are already available and those that are being created.
- An effectively functioning multi-modal transportation system.
- Sufficient economic, educational, recreational and cultural attractions to provide for a high level of livability for current and future generations of residents.
- Improvement in community services available to rural residents to enhance the quality of life of the region's communities.

The assessment phase of this planning process relied heavily on a wide variety of existing materials. Each is acknowledged fully in the body of the Plan. If any attributions were left out, please accept apologies and send an email (jirwin@mind.net) to advise of the necessary correction.

DOUGLAS COUNTY TELECOMMUNICATIONS & TECHNOLOGY STRATEGIC PLAN



EXECUTIVE SUMMARY

Too frequently we hear that businesses pass over the county, in part due to the lack of a competitive telecommunications infrastructure. This lack of a competitive infrastructure also results in the inability for our residents to take advantage of available online learning programs to improve the skills of the employees; to access telemedicine applications; or to take advantage of other rapidly emerging online resources to improve the business opportunities for our residents.

We hold it is the responsibility of the county's residents to provide the telecommunications and technology strategic planning for the community. The enormous impact to our economic well being and quality of life is best directed by the members of the community, then provisioned in a cooperative and collaborative fashion by the various vendors and services providers in an environment that fosters marketplace competition. The development and implementation of this strategic plan will help communities in the county to speed delivery of vital human services, better use existing resources, attract new resources, facilitate neighborhood planning and community organizing, and build learning networks through which people with similar interests can share their diverse experiences. Through access to advanced communications capabilities education, healthcare, governments, businesses, not for profits, myriad other organizations, and individual residents all will be positioned to take advantage of the benefits afforded through expanded opportunities for sharing information and knowledge.

The Roseburg Area Chamber of Commerce Telecommunications [subcommittee](#) sponsored the development of this Douglas County Telecommunications Strategic Plan. The strategic planning process and outcome demonstrates the importance of collaborating and cooperating across many sectors of Douglas County. The elements of this plan support the Regional Investment Board's [vision](#). This planning process commenced in November of 2001 and reached the conclusion of this phase in June of 2002.

Taking action on the goals identified by the planning group can result in positive impacts to the economic climate in the region and will also positively impact the quality of life for the region's residents.

Goal One

All forms of telecommunications services in Douglas County should be accessible, reliable, and reasonably priced for all community residents regardless of location.

Goal Two

Douglas County telecommunications infrastructure will have standard communications capabilities, provide open access, encourage seamless network management, and use scalable solutions to accommodate growth in demand and be adaptable to new applications and opportunities.

Goal Three

Provide quality telecommunications services at a reasonable cost by creating partnerships and aggregating demand to reduce operating costs to the benefit of the Douglas County community users.

Goal Four

Provide a Douglas County telecommunications infrastructure with high-speed and reliable access to communications-based technologies and information so that employees can be as efficient as possible, businesses can be competitive in the world of electronic commerce, and residents can have every access to information and services.

Goal Five

Improve overall competency of Douglas County's workforce by supporting a well-trained work force that encourages new business development and existing business growth that leverages advanced telecommunications services and the advantages of being designated as an Oregon eCommerce zone.

Success of this strategic plan depends on continued community cooperation and collaboration. The plan resulting from the collaboration and the cooperation that got us here is rooted in a synthesis of best practices collected from successful ventures throughout the United States, indeed the world, combined with rigorous discussion and refinement from a cross-section of Douglas County residents.

The first action in response to this Strategic Plan needs to be the establishing of the Douglas County Telecommunications Task Force (DCTTF). The group needs to be populated by representation from both the urban and rural areas of the county. The DCTTF would be charged with maintaining the Plan and monitoring progress on the further evolution of the Plan, and further work will be required.

Additional next steps would include the forming of sector oriented committees to work under the auspices of the county wide Task Force, such as healthcare, education, commerce, government, and so on. One such group, healthcare, already agrees to work together under the framework established in this Plan. Indeed, folks already discovered a name that represents the region served and the community of interest, Umpqua Community Medical Network. Herein lies an opportunity to create the partnerships necessary to provide coordination and cooperation for this vital quality of life segment, healthcare. Let's get that group convened this summer and get to work on a strategic plan for the use of telecommunications and technology in our healthcare community members.

We present this plan to the residents of Douglas County with the understanding the work has just begun and we need to continue our efforts together. Together we can achieve our mission of...

Building a better Douglas County by connecting to the world!

VISION – MISSION – GOALS – ACTIONS



INTRODUCTION

Too frequently we hear that businesses pass over the county, in part due to the lack of a competitive telecommunications infrastructure. This lack of a competitive infrastructure also results in the inability for our residents to take advantage of available online learning programs to improve the skills of the employees; to access telemedicine applications; or to take advantage of other rapidly emerging online resources to improve the business opportunities for our residents.

We hold it is the responsibility of the county's residents to provide the telecommunications and technology strategic planning for the community. The enormous impact to our economic well being and quality of life is best directed by the members of the community, then provisioned in a cooperative and collaborative fashion by the various vendors and services providers in an environment that fosters marketplace competition. The development and implementation of this strategic plan will help communities in the county to speed delivery of vital human services, better use existing resources, attract new resources, facilitate neighborhood planning and community organizing, and build learning networks through which people with similar interests can share their diverse experiences. Education, healthcare, governments, businesses, not for profits, myriad other organizations, and individual residents all will be positioned to take advantage of the benefits afforded through expanded opportunities for sharing information and knowledge through access to advanced communications capabilities.

At the heart of this Strategic Plan is cooperation and collaboration, public and private. We open the discussion and participation to all who would take the needs of the community to be a priority in determining outcomes related to economic development and quality of life. In particular we need the participation of current and emerging telecommunications services providers. Serving the public needs (i.e., customers) will help to ensure solvency and profitability of serving entities. We want to see these services provisioned for an unknown period of time.

We recognize all services providers are businesses in one form or another (yes, even community owned providers). A parallel effort needs to occur on the education side of the equation. Here we must assist our residents in understanding how to integrate these technologies into their lives, whether for profit, for service, or for entertainment purposes. Provisioning these advanced telecommunications services and sustaining their availability requires sufficient demand to generate revenues for their maintenance and operation. There is no free lunch. Financing and revenue must come from somewhere, albeit there is great opportunity for creativity in these activities.

As yet there is no "cookie-cutter" approach to establishing and maintaining these services. A scan of available documentation of the many forms taken to provision these services is almost mind-boggling. "Best practices" do reflect some common threads however, not the least of which is the use of collaborative models involving the community at large. Defining "community" takes on some interesting approaches and is no longer bound by neighborhood or city lines. Included in that community can be existing services providers. When that has occurred, their profitability increased as well as their ratings for service. Currently there are some instances where public participation as a provider has been legislated away. It will be interesting to see how long providers survive in an adversarial atmosphere that pits them against their source of revenue. The "successful" model or models are still emerging.

To help us address the emerging telecommunications and technology landscape the Roseburg Area Chamber of Commerce Telecommunications subcommittee sponsored the development of this Douglas County Telecommunications Strategic Plan. The strategic planning process and outcome demonstrates the importance of collaborating and cooperating across many sectors of Douglas County. The elements of this plan support the Regional Investment Board's vision. This planning process commenced in November of 2001 and reached the conclusion of this phase in June of 2002.

Note that this Plan is more a framework for proceeding than a completed act. Market forces and public good are mated together in the approach. You will not find any specific detail of technology referenced. In reality this is a Plan for leveraging technology for economic and community development and NOT a technical plan per say. At the heart of the Plan is a belief that working together makes sense. It makes sense when framed in a context similar to water systems, sewers, roads, electricity, and other shared

community infrastructure. Here's an opportunity to work together to identify needs here-to-fore not fully documented and to then set about finding ways to fill those needs...together. Taking action on the goals identified by the planning group can result in positive impacts to the economic climate in the region and will also positively impact the quality of life for the region's residents.

Behind the plan is a lot of work devoted to understanding the Douglas County telecommunications and technology landscape. We used existing research and analysis wherever we could find it. Much of that is reproduced whole cloth in this document and fully attributed.

Numerous exchanges of ideas occurred throughout the process using the technology at our hands. A list serve provided a means for quick communication amongst the planners. A Website posting of the materials used to support our assessment provided the opportunity to view drafts of sections and to comment.

The Roseburg Area Chamber of Commerce provided its mailing list, materials, postage, and staff time to circulate and collect a survey. The return rate for the surveys exceeded expectations of 4-6% and came in at 24%.

We also conducted a SWOT analysis and used that to ensure all elements of that analysis are addressed in the Plan.

STRENGTHS	GOAL 1	GOAL 2	GOAL 3	GOAL 4	GOAL 5
Quality of life	X		X	X	X
Electric Co-operative	X		X	X	
Awareness/motivation to make positive changes	X		X	X	X
Motivated work force/intelligent work force, trainable work force, etc				X	X
Incentives like tax breaks, quality of life, cost of living			X	X	X
On I-5 corridor					
Railroad					
Political/community leadership	X		X	X	X
High-speed fiber access	X	X	X	X	X
Tier 1 Internet access	X	X	X	X	X
Postage stamp pricing	X	X	X	X	X
Direct fiber connect to Asia	X	X	X	X	X
Potential for out of county data storage		X	X	X	X
PC home and business ownership			X	X	X
Pent-up demand for high speed access	X	X	X	X	X
Number of ISP's	X	X	X	X	X
Good community college	X		X	X	X
Medical Center	X		X	X	X
Work from home-build on		X		X	X
WEAKNESSES					
Embracing change	X	X	X	X	X
Telecom infrastructure	X	X	X	X	X
Limited trained work force	X	X	X	X	X
"Hundred valleys of the Umpqua" - Terrain		X	X	X	X
Ability to attract services	X	X	X	X	X
Limited amount of industrial property	X	X	X	X	X
No telecom strategic plan	X	X	X	X	X
Too many backhoes	X	X			
High cost of build-out	X	X	X	X	X
Scarce funds (capital)			X	X	X

ROI by telco's uses urban model			X	X	X
Unbundled network elements			X	X	X
Telco perception of rural opportunities	X		X	X	X
Insular thinking	X	X	X	X	X
Need to think beyond County		X	X	X	X
Community healthcare network	X	X	X	X	X
Not for profit technical capacity	X	X	X	X	X
No commercial airport					
Political attacks on BPA concept	X		X	X	X
Understanding of how to use advanced Internet services	X		X	X	X
Public transportation		X	X	X	X
Upscale shopping		X	X	X	X
Young people leave	X	X	X	X	X
Retention/recruitment of rural healthcare providers	X	X	X	X	X
Seniors using email in rural areas	X	X	X	X	
Lack of reasonably priced high-speed services	X	X	X	X	X
OPPORTUNITIES					
Preserves high quality of life	X	X	X	X	X
Better level of services, or better	X	X	X	X	X
Move to high tech usage	X	X	X	X	X
Rebound in economy	X	X	X	X	X
Advances in medicine/Tele-Health	X	X	X	X	X
Government	X	X	X	X	X
Financing		X	X	X	X
Global market access – To & From	X	X	X	X	X
Educational opportunities	X	X	X	X	X
Digital libraries	X	X	X	X	X
Cultural activities	X	X	X	X	X
Entertainment	X	X	X	X	X
Testing	X	X	X	X	X
Job market	X	X	X	X	X
Politics	X	X	X	X	X
Tourism	X	X	X	X	X
Constantly evolving technology	X	X	X	X	X
Homeland security	X	X	X	X	X
Telco's	X	X	X	X	X
Telecommute	X	X	X	X	X
Cost of fiber/equipment		X	X	X	X
More than 1 backhaul provider		X	X	X	X
Offsite data storage	X	X	X	X	X
THREATS					
Financing		X	X	X	X
Media-bad press	X	X	X	X	X
Politics	X	X	X	X	X
Government	X	X	X	X	X
Unwilling to embrace change	X	X	X	X	X
Constantly changing technology	X	X	X	X	X

Lack of information	X	X	X	X	X
Existing, entrenched, telcos	X	X	X	X	X
"Homeland security"	X	X	X	X	X
Franchise fees	X		X	X	X
On I-5 corridor (Security)					

A service to the community underlies all our efforts. This truly was an apolitical approach. We entered this effort with open minds as to possible outcomes and have not foreclosed any private, public, or public private approach. You will find a balance in the Plan between the supply side (provisioning the infrastructure) and the demand side (educating folks on how to use it so as to build demand). This reflects an understanding of the realities of creating and maintaining such an infrastructure. The modified so-called "Field of Dreams Approach" ("build it and they will come, don't build it and they sure won't come!") now shows us that even if you build it...they may not come to use it. We have to educate our residents so as to help them understand how to use this resource. After all, they're the ones who stand to gain the most from it.

As you read through the Plan think of ways to use it and/or to make it better. Participate in this ongoing effort to leverage technology for the benefit of economic development and quality of life for our communities. Bottom line is...it's up to you!

VISION STATEMENT

Douglas County is connected to the world! Advanced technologies spur economic development and enhance the quality of life of all residents. Government, businesses, healthcare, not for profits and education all benefit from access to a reasonably priced, robust infrastructure that provides maximum flexibility, growth and expandability.

Residents go on line to obtain government services; they get building permits, pay traffic fines, access property information and pay their taxes. The list of services changes periodically because county and city government, through surveys, on-line town meetings and other well-publicized programs, seeks continuing feedback from the people who live here. The economic development department is responsible for the ongoing creation and maintenance of a high-tech profile for the county as well as for funding the zone with a series of grants and entrepreneurial activities. These funding sources ensure sustainable access to on-line information in public areas; for instance, in schools after hours, in public areas of Douglas County communities, and in County Libraries.

Residents benefit from access to education from the high technology facilities in the county. Umpqua Community College and county schools provide an aggressive and targeted workforce development program. A Director of Workforce Development works closely with all segments of business, healthcare, not for profits and government to develop goals and set priorities. High schools and the community college provide distance education from resources throughout Oregon and the US so that students of all ages can acquire advanced training or degrees where they live. Convenient interaction among education, businesses, not for profits, healthcare, government groups, and residents makes it easy to determine appropriate training programs and to establish a technically adept work force. That workforce is the cornerstone of county industry as it includes the best and the brightest of the county's young people. Students from Douglas County bring their skills back to the area because of the unsurpassed quality of life and opportunities for career advancement.

Businesses are thriving. Douglas County provides a unique mix of traditional and technical occupations. The facilities that promote e-commerce are readily available. Redundant infrastructure continues to attract high tech firms to the area. Due to the availability of advanced telecommunications services even small businesses find it easy to compete in the global market. Large firms meet and exceed their goals for production and expansion. Family wage jobs are plentiful. The population is somewhat younger and more diverse across many dimensions.

All of the county's healthcare service providers are online and participate as members of a Community Medical Network. Telehealth (includes telemedicine) services are available throughout the county. Telemedicine reaches into the most remote areas of the county, extending the reach of providers for consultations, diagnostics, and emergency services. Patient education and monitoring is everywhere in the county. Patients no longer have to drive long distances for pre-surgery education and can obtain quality information to assist them with management of their health. Through remote monitoring and patient interactions residents are afforded the opportunity to remain in their homes for longer periods of time as they age.

The Douglas County Telecommunications Task Force, Economic Development department and educational groups conducts forums in each community to educate participants on use of the technologies as well as to gather information. Input from the forums is shared with business, education, county and city government, and service providers during regular meetings. The Task Force, Economic Development department, the Chamber of Commerce and the Industrial Development Board work together to formulate and review telecommunications policies for the county. It works with the community to set priorities regarding the "What" and "How" of telecommunications provisioning. The Task Force conducts and publishes inventories maintained by the Department of Economic Development of available infrastructure and services.

The Task Force serves as a liaison between County telecommunication stakeholders and service providers, and, largely through the regular forums, fosters an environment of open communication, cooperation and collaboration among the providers of communications services. County departments and private contractors work together to establish and coordinate construction and contractor standards

for the telecommunications infrastructure. Standardized telecommunications services are employed by all local service providers. The Task Force works with providers and residents to monitor and ensure ongoing telecommunications infrastructure maintenance and upgrading of facilities.

Representatives from the Task Force work with people from Jackson, Josephine, Klamath, Lake, Coos and Curry counties to develop regional plans that guarantee reasonably priced equal access to all people in Southern Oregon and to ensure compatibility of Douglas County's telecommunication infrastructure with those of the Southern Oregon region.

MISSION STATEMENT

Building a better Douglas County by connecting to the world!

GOALS/OBJECTIVES AND ACTION PLANS

Goal One

All forms of telecommunications services should be accessible, reliable, and reasonably priced for all Douglas County community residents regardless of location.

Goal One Action Items:

- A. Provide public education to support and to encourage access to all forms of telecommunications, including broadband Internet access and high-speed data transfer.
 1. Create and maintain an open forum to share telecommunications and technology knowledge.
 - a. Sponsored by the Roseburg Chamber of Commerce.
 - b. Participation encouraged from all sectors of the county.
 2. Ensure regular presentations to the community by educators, technologists, and community development experts to build awareness and to exploit the motivation of residents to continually improve economic development and quality of life.
 - a. Annual telecommunication and technology day.
 - b. Frequent seminars on new technology and how to use it.
 - c. Share knowledge on the benefits for integrating emerging technologies into daily life
 - d. Share knowledge of effective planning processes.
 3. Utilize multiple communication channels to share information
 - a. Web sites
 - b. eNewsletters
 - c. Forums
 - d. Open access TV
 - e. Radio (e.g., public radio)
 - f. Newspapers
- B. Develop and maintain a publicly available telecommunication systems inventory.
 1. Conduct an inventory of current systems and capabilities.
 2. Establish a database of findings for regional planning purposes.
 3. Publicize and make available the contents of the database.
 - a. Web site
 - b. Newspaper articles
 - c. Public radio
 - d. Open access TV
- C. Conduct and maintain a publicly available needs assessment
 1. Periodically conduct a countywide needs assessment.
 - a. Number of residents that need services and what kinds of services they need.
 - b. Use existing surveys and other sources of statistical information when available.
 2. Publicize the list of available services and fees for all areas of the county
 3. Publicize service gaps as a means of involving all of the community in deriving solutions.
- D. Actively engage telecommunications providers in pursuing ways to provide reasonably priced access to broadband services throughout the county.
 1. Regularly meet with providers to share information about needs and demand.
 2. Work with providers to develop a plan for ensuring reliable access to broadband services at competitive rates.
 3. When applicable, develop a community-based action plan for attracting other providers or for creating a utility district using public or private/public resources.
- E. Create a standing committee (Douglas County Telecommunications Task Force) that builds on community participation and leadership to coordinate and oversee a community oriented telecommunications policy.
 1. Include membership/representation from a wide variety of county participants.
 2. Ensure implementation of the strategic plan
 3. Periodically review and update the Strategic Plan

4. Ensure endorsement of the Strategic Plan by county institutions, businesses, and residents

Goal Two

Douglas County telecommunications infrastructure will have standard communications capabilities, provide open access, encourage seamless network management, and use scalable solutions to accommodate growth in demand and be adaptable to new applications and opportunities.

Goal Two Action Items:

- A. All telecommunications systems of the county should be as versatile and compatible as possible with existing and future technology.
 1. Continually analyze existing systems for any deficiencies or limitations that may be present.
 2. Determine the most efficient and cost-effective way of correcting current deficiencies.
 3. Create mechanisms to ensure route redundancy to minimize downtime from infrastructure disruption.
- B. The communications systems of the region should be compatible with telecommunications technology used by other entities outside the direct control of the region (e.g., state and federal systems).
 1. Identify current and potential system interfaces.
 2. Develop collaborative and cooperative approaches to creation of system interfaces.
 3. Determine the most efficient and cost-effective way of ensuring compatibility among systems.
- C. Ensure that the Plan provides for a flexible and sustainable infrastructure
 1. Determine current technology and infrastructure needs and best estimates of future needs.
 2. Ensure that any significant changes or additions to existing or planned technology infrastructure be able to accommodate anticipated demands at least three years into the future.
- D. Support open access, open source, and open system architectures
 1. Select alternatives that support standard protocols, equipment, software, and widely used expertise.
 2. Support the use of standards and open system approaches to leverage purchasing power and to reduce maintenance costs.
 3. Support open access as a means to ensuring competition.

Goal Three

Provide quality telecommunications services at a reasonable cost by creating partnerships and aggregating demand to reduce operating costs to the benefit of the Douglas County community users.

Goal Three Action Items:

- A. Collaborate with appropriate regional councils, consortia, and committees to understand possibilities for partnerships and aggregating demand.
 1. Southern Oregon Telecommunications and Technology Council (SOTTC)
 2. Umpqua Regional Council of Governments (URCOG)
 3. Coos, Curry, and Douglas County Regional Investment Board (RIB)
 4. Job Councils
 5. Others as applicable
- B. Work with State of Oregon's agencies and departments to create a viable shared statewide telecommunications infrastructure.
 1. Department of Administrative Services
 2. Oregon Economic and Community Development Department (OECD)D
 3. Other entities as appropriate
- C. Create partnerships for the purpose of acquiring technologies/services using aggregated buying power and for decision-making influence.
 1. Government

2. Education
 3. Businesses of all sizes
 4. Not for profits
 5. Electric cooperatives
 6. Telecommunications providers
 7. Healthcare
- D. Membership in the planning process should be open to all that are interested and qualified to participate. Special efforts to include:
1. Critical Users
 2. Businesses
 3. Education
 4. Government (federal, state & local)
 5. Telecommunications Services and Providers
 6. Healthcare providers
 7. Not for profits
 8. Residents
- E. Ensure that where possible telecommunication technologies take advantage of economies of scale available through using a shared infrastructure and shared expertise.
1. Identify all potential users of a common countywide communications infrastructure
 - a. Education
 - b. Business
 - c. Healthcare
 - d. Not for profits
 - e. Government
 - f. Residents
 2. Develop a coordinated plan to create a common shared infrastructure for telecommunications and applications.
 - a. Business models
 - b. Capital budgets
 - c. Project plans
 - d. Economic sustainability
 3. Share technical support wherever practical to reduce costs to county users.

Goal Four

Provide a Douglas County telecommunications infrastructure with high-speed and reliable access to communications-based technologies and information so that employees can be as efficient as possible, businesses can be competitive in the world of electronic commerce, and residents can have every access to information and services.

Goal Four Action Items:

- A. Encourage maximum use of current technology resources and develop ways to promote access to all of the residents and institutions of the County.
1. Encourage the establishment and equipping of shared community access points, such as community technology resource centers, schools, or public libraries.
 2. Establish a visible and permanent plan to acquire quality surplus equipment and resources from business and government, and recondition or upgrade through school training programs to make available to business and public service facilities (for example, PC's).
- B. Evaluate funding alternatives to finance the acquisition of telecommunication access, equipment, operations, applications (e.g., eGovernment), and training necessary to utilize the infrastructure.
1. Revenue generating activities
 2. Private venture capital
 3. Community wealth
 4. Corporate grants
 5. Tax incentives
 6. Bonds
 7. Government, corporate or foundation grants
 8. Other potential sources.

Goal Five

Improve overall competency of Douglas County's workforce by supporting a well-trained work force that encourages new business development and existing business growth that leverages advanced telecommunications services and the advantages of being designated as an Oregon eCommerce zone.

Goal Five Action Items:

- A. Provide opportunities for community residents to participate in a wide variety of learning opportunities available through educational institutions wherever they may be located.
 1. Promote use of online distributed education using self-paced and/or guided courses.
 2. Use expanded bandwidth for video courses, including online approaches.
 3. Develop partnerships between Distance Education providers.
 - a. Universities
 - b. Community colleges
 - c. School districts
 - d. Other potential partners
 2. Provide information on programs and funding resources for training and certification
 - a. Post on a single web site.
 - b. Link to the info from other sites dealing with workforce development.
 3. Encourage and promote development of advanced degrees or technical skills training.
 - a. Public Service Announcements
 - b. Seminars
 4. Identify funding opportunities for students and employees seeking to improve skills.
 - a. Post on a single Web site.
 - b. Public Service Announcements.
 5. Work with business to encourage internships in technology and telecommunications capabilities.
 - a. Develop incentives for internships.
 - b. Provide mentoring and other forms of personal development.
 6. Develop programs to encourage leveraging of technology for new business development and to grow existing businesses.
 - a. Assist with obtaining financing.
 - b. Provide consultation on operations improvements.
 - c. Focus on leveraging the new and emerging technologies.
- B. Develop programs to educate residents on eCommerce opportunities.
 1. Develop an eCommerce curriculum dealing with eCommerce fundamentals and advanced concepts.
 - a. High schools
 - b. Umpqua Community College
 2. Develop an eCommerce continuing education program for business owners and employees.
 - a. Delivered onsite.
 - b. Delivered at other convenient venues and times.
- C. Work with the region's educational institutions, economic development departments and businesses to educate potential participants and to create campaigns to promote the county's designation as an Oregon eCommerce Zone, touting business incentives as well as telecommunication and technology capabilities.
 1. Create a "one-stop" assistance program that integrates all business licensing and application processes.
 - a. Identify a single point of contact.
 - b. Provide assistance (guidance) in completing any applications.
 - c. Develop an informational package for use in both promotional activities and as a guideline for interested participants.
 2. Promote the eCommerce Zone designation and assistance program using regional, statewide, and nationwide media.
 - a. Public Service Announcements (PSA's) on commercial venues.
 - b. Purchase advertising on business programs (TV and Radio).

- c. Purchase advertising in national newspapers.
- d. Underwrite programs on KLCC or JPR.

ASSESSMENT



ASSESSMENT SUMMARY

This Assessment section of the Plan contains a bounty of data. This brief summary addresses a few of the highlights. Please invest a little time and view all of the charts and graphs collected here.

Douglas County's low population density and rugged terrain presents challenges for building out the advanced telecommunications infrastructure in the rural areas of the county. Roughly 41% of Douglas County's population lives in the incorporated areas close to I-5. Since 1990, most of the population growth in Douglas County occurred in the Roseburg incorporated area. Roseburg added 56% of the county's total growth. On a percentage basis, the fastest population growth (+33%) occurred in Sutherlin. By contrast, the unincorporated areas are down by a negative 2%. The population gradually is aging due to the aging baby boom population and the growth of the retirement age population. Another possibility is that younger age groups have left with their children because of the lack of living wage employment in the region.

Economic development planners project Douglas County to be among the slowest job growth areas in the state. The projected job growth rate is 14.2% over the 1998-2008 period. Douglas County's industrial structure is still highly dependent on manufacturing and, in particular, lumber and wood products. Fully 17% of total employment is in the lumber and wood products industry compared to 3% statewide. Lack of diversification makes Douglas County vulnerable to recessions, both at home and from other parts of the globe. This produces a roller coaster ride in employment growth. Unemployment in the county has not dropped below 8% in the past 10+ years, trending at roughly twice the national average. Due to slower population growth, lower average income and wage levels, and an industrial base reliant on slow growing or declining industries, Douglas County generally experiences a much slower economic growth than the statewide average.

The bulk of new jobs came at service firms, trade businesses, and construction companies. Together, these industries accounted for most of the new jobs created in the county since 1990. These industries added more jobs than the total net increase. By 2008, the Services industry expects to have the greatest numerical increase in jobs in Douglas County (26%). This growth represents continued but slowing growth in temporary help and employee leasing firms as well as computer-related services, such as computer support, as the economy continues to shift towards increased automation. With a slower growing, albeit aging, population and increased efforts to contain health care costs, the health services sector expects to see substantial, although slowing, employment growth.

Economic forecasts predict the regional growth will continue to lag behind the urban areas of the state, suggesting the need to invest in projects and activities which lead to economic diversification, job growth, and improved community services. The potential for enhancing economic development and quality of life factors through leveraging of technology is high, especially using advanced telecommunications services (i.e., broadband Internet access, high speed data transfer, and other related uses).

A recent Douglas County survey provides us with insight into the readiness of County residents for moving into the future and their dependencies on the provisioning of advanced telecommunications services to ensure that future.

	<u>Importance of:</u>	
	<u>Internet Access</u>	<u>Access Speed</u>
	(Critical or Very Important)	
Home Users	75%	71%
Business Users	90%	89%

Residents seemingly possess the required skills to successfully utilize the technologies.

	<u>Basic Computer Skills</u>	<u>eMail</u>	<u>WWW</u>	<u>Online Data Processing</u>
Home Users	90%	88%	85%	35%
Business Users	90%	89%	85%	59%

Average Number of PC's at Home = 1.4

Average Number of PC's at Work = 11.3

These results reveal a potential pent up demand for advanced telecommunications services, especially with current access modes.

Modes of Access To the Internet - Dial Up

Home users	83%
Business Users	64%.

The survey also tells us a couple of other things about telecommunications in Douglas County.

Satisfaction with telecommunications service providers indicates providers have considerable opportunity to improve their service levels.

	<u>Excellent</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>
Home Users	6%	42%	38%	7%
Business Users	8%	52%	34%	6%

An indicator of the increasing mobility of telecommunications users, especially for telephony is the penetration of cell phone usage.

	<u>Wireline</u>	<u>Wireless</u>
Home Users	96%	74%
Business Users	100%	73%

The results of this survey indicate the potential for economic growth leveraging the use of technology is upon us and that the introduction of an advanced telecommunications infrastructure would be highly beneficial to the county's residents. Uncapping the barriers to communicate using advanced telecommunications services within the region and to the rest of the world would position Douglas County to be participants in the global economy.

Regional planners identify local capacity building as an important tool to increase local participation in economic growth. While regional efforts can and will continue to contribute significantly to such efforts, grass roots participation by small rural communities in various economic and community development programs will depend on the availability of resources. The coordination and cooperation developed through strategic planning efforts can go a long way to ensure the efficient and effective deployment of those scarce resources. This is especially true when it comes to creating and maintaining a telecommunications infrastructure in rural areas. The enormous impact to our economic well being and quality of life is best directed by the members of the community, then provisioned in a cooperative and collaborative fashion by the various vendors and services providers in an environment that fosters marketplace competition.

The development and implementation of a telecommunications and technology strategic plan will help communities in the county to speed delivery of vital human services, better use existing resources, attract new resources, facilitate neighborhood planning and community organizing, and build learning networks through which people with similar interests can share their diverse experiences. Through access to advanced telecommunications capabilities education, healthcare, governments, businesses, not for profits, myriad other organizations, and individual residents all will be positioned to take advantage of the benefits afforded through expanded opportunities for sharing information and knowledge.

DOUGLAS COUNTY PROFILE

General Overview and History

County Seat: Courthouse, 1036 SE Douglas, Rm. 217, Roseburg 97470
Phone: 541-440-4323 (Clerk); 541-957-2409 (Court Administrator)
Web: www.co.douglas.or.us

Established: Jan. 7, 1852

Elevation at Roseburg: 479'

Area: 5,071 sq. mi.

Average Temperature: January 41.2, July 68.4

Assessed Value: \$4,287,612,084

Real Market Value: \$7,809,002,890

Annual Precipitation: 33.35"

Economy: Forest products, mining, agriculture, fishing and recreation.

Points of Interest: Winchester Bay and Salmon Harbor, Oregon Dunes National Recreation Area, North Umpqua River, Diamond Lake, historic Oakland, Wildlife Safari, Douglas County Museum, wineries.

Douglas County was named for U.S. Senator Stephen A. Douglas, Abraham Lincoln's opponent in the presidential election of 1860 and an ardent congressional advocate for Oregon. Douglas County was created in 1852 from the portion of Umpqua County which lay east of the Coast Range summit. In 1862, Douglas County absorbed what remained of Umpqua County.

Douglas County extends from sea level at the Pacific Ocean to 9,182-foot Mt. Thielsen in the Cascade Range. The Umpqua River marks the dividing line between northern and southern Oregon, and its entire watershed lies within the county's boundaries. The county also contains nearly 2.8 million acres of commercial forestlands and the largest stand of old growth timber in the world, which still provides the region's main livelihood. Approximately 25 to 30 percent of the labor force is employed in the forest products industry. Agriculture includes field crops, orchards and livestock. Over 50 percent of the land area of the county is owned by the federal government.

County Officials:

Commissioners

Joyce Morgan (R) 2005
Doug Robertson (R) 2005
Mike Winters (R) 2003

Attorney

Jack Banta (NP) 2005

Assessor

Ron Northcraft (NP) 2003

Clerk

Doyle Shaver (NP) 2003

Justices of the Peace

Candi Hissong (NP) 2004
Stephen H. Miller (NP) 2004

Carol Roberts (NP) 2004
Russell Trump (NP) 2002

Sheriff

Jim Main (NP) 2005

Surveyor

Romey Ware (NP) 2005

Treasurer

Sam Huff (NP) 2005

History:

The early history of Douglas County was closely tied to that of Umpqua County. Umpqua County, created in 1851, was located along the Umpqua River in southwestern Oregon. Gold had been discovered in the Umpqua region resulting in the rapid increase in settlement of the new county. The first meeting of the Umpqua County Court was in Elkton in 1852; later the county government was moved to Green Valley and Yoncalla.

Because the population of Umpqua County had rapidly increased and met the population requirements for a new county, a new county was created on January 7, 1852, out of that portion of Umpqua County lying east of the Coast Range. It was named Douglas County to honor U. S. Senator Stephen A. Douglas of Illinois who was a congressional advocate for Oregon statehood.

Meanwhile, in Umpqua County the gold mining boom played out, and the population of Umpqua County decreased until finally in 1862 it was absorbed into Douglas County and ceased to exist. In 1856 the Camas Valley was annexed to Douglas County from Coos County and further boundary adjustments were made with Jackson and Lane Counties in 1915. Today, Douglas County covers 5,071 square miles and is bounded by Curry, Jackson, and Josephine Counties to the south; Klamath County to the east; Lane County to the north; and Coos County and the Pacific Ocean to the west.

In the county seat of Roseburg, courthouses were built in 1855, 1870, 1891, and 1929. The 1929 courthouse is still in use. Umpqua County never had a courthouse.

The first meeting of the Douglas County Commission was held at Winchester on April 4, 1853, with the three elected commissioners and sheriff in attendance. Winchester remained the county seat until 1854 when Deer Creek (renamed Roseburg in 1855) was made the seat by popular election. Douglas County had a county court form of government until 1965 when a board of commissioners was formed. Current elected officials include three commissioners, assessor, clerk, district attorney, sheriff, surveyor, and treasurer.

Douglas County is represented by Senate Districts 22, 23, and 24; Representative Districts 43, 45, 46, and 47; and the Fourth Congressional District. The county's population has increased steadily from 3,203 in 1860 to 99,100 in 1997.

The entire watershed of the Umpqua River lies within the boundaries of Douglas County. The heavily timbered county contains nearly 1.8 million acres of commercial forestlands and one of the oldest stands of old growth timber in the world. Approximately 25-30% of the labor force is employed in the forest products industry. Agriculture, mainly field crops, orchards, and livestock, is also important to the economy of the county. Nickel has been refined at Riddle since 1954. There is a significant federal presence in the region; the U.S. Forest Service and Bureau of Land Management administer more than 50% of the county's land.

The Umpqua Indians of the Umpqua Valley belonged to the Chinook tribe. Following the Rogue River Indian War in 1856, all remaining natives were moved by the government to the Siletz and Grande Ronde Indian Reservations.

Table 1 - Economic Indicators

	1994	1995	1996	1997	1998	1999
Population	97,100	97,700	98,600	99,100	100,300	100,850
Labor Force	43,160	43,360	44,490	45,140	45,710	45,246
Total Employment	39,220	39,880	40,510	40,180	41,460	41,023
Unemployment	3,940	3,480	3,980	3,960	4,250	4,223
Unemployment Rate (%)	9.1	8.0	8.9	8.8	9.3	9.3
Non-Farm Payroll Employment	32,850	34,170	35,140	36,550	36,980	N/A
Total Covered Employment	32,915	33,871	34,760	36,606	36,880	37,477
Total Covered Payroll (\$ thousands)	730,743	771,025	821,297	890,443	924,067	N/A
Average Annual Payroll Per Employee (\$)	22,201	22,764	23,268	24,325	25,056	25,709
Number of Business Units	2,676	2,728	2,680	2,793	2,853	2,853
Total Personal Income (\$ thousands)	1,636	1,747	1,849	1,936	2,092	N/A
Annual Per Capita Personal Income (\$)	16,646	17,534	18,355	19,056	20,543	N/A
Assessed Value of Property (\$ millions)	3,980	4,202	4,516	4,753	5,136	5,396
Residential Construction						
Building Permits---	378	360	391	263	N/A	N/A
Value (\$ thousands)---	33,203	24,063	38,191	37,717	N/A	N/A
Travel Expenditures (\$ thousands)	141,700	147,700	150,300	154,900	N/A	N/A
Travel-Related Employment	2,226	2,220	2,163	2,142	N/A	N/A

N/A -- Data is not yet available.

Sources: Oregon Employment Department; Center for Population Research & Census, PSU; Bureau of Economic Analysis; Oregon Tourism Commission; Oregon Department of Revenue; Oregon Economic and Community Development Department
Updated February 1, 2001 <http://www.econ.state.or.us/SWCEIDO.HTM>

Table 2 - People Quick Facts

	Douglas County	Oregon
Population, 2000	100,399	3,421,399
Population, percent change, 1990 to 2000	6.1%	20.4%
Persons under 5 years old, percent, 2000	5.6%	6.5%
Persons under 18 years old, percent, 2000	24.0%	24.7%
Persons 65 years old and over, percent, 2000	17.8%	12.8%
White persons, percent, 2000 (a)	93.9%	86.6%
Black or African American persons, percent, 2000 (a)	0.2%	1.6%
American Indian and Alaska Native persons, percent, 2000 (a)	1.5%	1.3%
Asian persons, percent, 2000 (a)	0.6%	3.0%
Native Hawaiian and Other Pacific Islander, percent, 2000 (a)	0.1%	0.2%
Persons reporting some other race, percent, 2000 (a)	1.0%	4.2%
Persons reporting two or more races, percent, 2000	2.7%	3.1%
Female persons, percent, 2000	50.8%	50.4%
Persons of Hispanic or Latino origin, percent, 2000 (b)	3.3%	8.0%
White persons, not of Hispanic/Latino origin, percent, 2000	91.9%	83.5%
High school graduates, persons 25 years and over, 1990	46,183	1,511,760
College graduates, persons 25 years and over, 1990	7,261	382,171
Housing units, 2000	43,284	1,452,709
Homeownership rate, 2000	71.7%	64.3%
Households, 2000	39,821	1,333,723
Persons per household, 2000	2.48	2.51
Households with persons under 18, percent, 2000	32.4%	33.4%
Median household money income, 1997 model-based estimate	\$32,005	\$37,284
Persons below poverty, percent, 1997 model-based estimate	14.6%	11.6%
Children below poverty, percent, 1997 model-based estimate	20.5%	16.3%

Table 3 - Business Quick Facts

	Douglas County	Oregon
Private nonfarm establishments, 1999	2,666	99,945
Private nonfarm employment, 1999	30,942	1,332,403
Private nonfarm employment, percent change 1990-1999	12.8%	31.0%
Nonemployer establishments, 1998	5,530	209,844
Manufacturers shipments, 1997 (\$1000)	1,494,702	47,665,990
Retail sales, 1997 (\$1000)	669,031	33,396,849
Retail sales per capita, 1997	\$6,584	\$10,297
Minority-owned firms, percent of total, 1997	4.4%	6.2%
Women-owned firms, percent of total, 1997	30.8%	27.6%
Housing units authorized by building permits, 2000	363	19,877 ¹
Federal funds and grants, 2000 (\$1000)	552,364	16,552,889
Local government employment - full-time equivalent, 1997	4,027	117,999

Table 4 - Geography Quick Facts

	Douglas County	Oregon
Land area, 2000 (square miles)	5,037	95,997
Persons per square mile, 2000	19.9	35.6
Metropolitan Area	None	

Notes for Tables 2, 3, and 4

1: Includes data not distributed by county.

(a) Includes persons reporting only one race.

(b) Hispanics may be of any race, so also are included in applicable race categories.

FN: Footnote on this item for this area in place of data

NA: Not available

D: Suppressed to avoid disclosure of confidential information

X: Not applicable

S: Suppressed; does not meet publication standards

Z: Value greater than zero but less than half unit of measure shown

F: Fewer than 100 firms

Source U.S. Census Bureau: State and County QuickFacts. Data derived from Population Estimates, 2000 Census of Population and Housing, 1990 Census of Population and Housing, Small Area Income and Poverty Estimates, County Business Patterns, 1997 Economic Census, Minority- and Women-Owned Business, Building Permits, Consolidated Federal Funds Report, 1997

COOS, CURRY AND DOUGLAS REGIONAL ASSESSMENT

Summary¹

The Coos, Curry, Douglas Region is entirely rural as defined in OAR 123-057-0310 (4) (a) and (b).

The Coos, Curry, Douglas region of Oregon is rich in natural resources with an economy which has historically been based on a foundation of nature based industries, particularly fisheries, forest products and interstate tourism.

Environmental, seasonal and supply constraints have taken a toll on the region's economy resulting in an inability of the region to participate in the growth in jobs, wages and personal income realized in the metropolitan and urban areas of the state.

Economic forecasts predict that the regional growth will continue to lag behind the urban areas of the state, suggesting the need to invest in projects and activities which lead to economic diversification, job growth and improved community services.

The Regional Investment Plan for the region focuses on the creation of economic and community development opportunities with an emphasis on building quality communities throughout the region. The Plan identifies economic and community development priorities for the allocation of State Lottery Funds, as follows:

- Community Development
 - Community Facilities
- Infrastructure/Technology
- Community Services
- Economic Development
 - Infrastructure/Technology
- Tourism
- New Business Development
- Business Retention/Recruitment
 - Workforce Development and Training

The Coos, Curry, Douglas Regional Investment Board will use these priorities to direct its investments in the region in the form of grants to public and non-profit organizations. Upon approval of the Regional Investment/Rural Action Plan by the region's County Commissions and the State of Oregon Economic and Community Development Department, the Regional Investment Board will request project applications to consider for funding. Grants will be managed, monitored and evaluated by the Board with staff support provided by CCD Business Development Corporation.

Rather than limiting funds to pre-selected industry sectors, the Coos, Curry, Douglas Regional Investment Plan and Rural Action Plan encourages projects and activities that diversify the local and regional economy.

In addition, the Board has determined that Regional Investment fund allocations will be targeted to broader, multi-community projects while the Rural Investment Fund allocations will be targeted to be community specific.

The allocation categories include a category entitled Immediate Opportunity projects. This category anticipates that projects will be developed and will need funding after the initial allocation process. The Regional Board will delegate the allocation of these Immediate Opportunity funds to the County Sub-committees.

Funds will be focused on implementation of local community priorities. Given the need to grow and diversify the region's economy, local community projects that focus on strengthening a community's economic environment will receive highest priority.

Regional Vision

The region's vision for itself in the period from 1999 to 2004 is:

"To create economic and community development opportunities and to build quality communities throughout the region."

The vision is comprised of the following primary components:

- An expanded base of small businesses that diversify the economy and increase the total employment within the region.
- Business expansions and recruitment efforts which have resulted from public/private partnerships and the successful promotion of the benefit of small-town locales.
- Sound public works infrastructure that addresses the region's needs for adequate water supply, treatment of wastewater and disposal of solid waste.
- Facilities and events that make the region a significant attraction for residents and tourists with emphasis on nature-based tourism, heritage tourism and tourism destinations.
- Participation in new communications technology and information systems.
- A workforce system that links education and skill development with jobs that are already available and those that are being created.
- An effectively functioning multi-modal transportation system.
- Sufficient economic, educational, recreational and cultural attractions to provide for a high level of livability for current and future generations of residents.
- Improvement in community services available to rural residents to enhance the quality of life of the region's communities.

Regional Assessment

The Coos Curry Douglas Region in Southwestern Oregon consists of 8,348 square miles stretched between the edge of the Willamette Valley to the north, the California border to the south, the Pacific Ocean to the west and the Cascade Mountain Range to the east.

The region is rich with natural resources. Abundant rivers, heavily forested mountains and the vast Pacific Ocean provide the region's residents a unique quality of life.

But, in addition to providing a livability not found in many other areas, these natural resources also provide a foundation for the region's resource-based industries, particularly fisheries, forest products and interstate tourism. Together, these form the basis for the region's economy.

These industries, which provide a significant number of the region's livelihoods, are becoming increasingly vulnerable to interlocking environmental, seasonal and supply constraints.

Population

University Center for Population Research and Census. Coos County had 61,400 residents, while Curry had 22,000 and Douglas had 100,300. This represents a modest increase of 9,401, or slightly more than 0.5% per year average, over the 1990 population of 174, 299.

Since 1990, Coos County's population has had a net gain of about 1,100 or about 2%. Curry County has added nearly 2,700 residents, a gain of about 14%. Since 1990, Douglas County has added 5,651 people for a 6% growth rate. Statewide population growth since 1990 has been 15%.

Most of the population growth in the region has been due to in-migration. Since 1990, the number of deaths in Coos County has exceeded the number of births by 9%. In Curry County, deaths exceeded births by 38%, reflecting the very high average age of the population. During that time, 1,600 more persons moved to Coos County than moved out; 3,200 more persons came to Curry County than left. In Douglas County, most of the population growth since 1994 has been almost entirely due to in-migration. In that County, the largest component of in-migration has been retirement-aged people. Between 1990

and 1997, the 65+ group accounted for 60 percent of all net in-migration and 46% of total population growth. For comparison, about 70% of Oregon's population growth since 1990 has come from migration.

The population of all three counties is gradually aging due to the aging baby boom population and the growth of the retirement age population. Another possible interpretation of the data developed by the Oregon Employment Department is that younger age groups have left with their children because of the lack of living wage employment in the region.

In Coos and Curry Counties, the fastest growing age groups are those between 45 and 54 and those 75 or older. In Douglas County, the labor force totals 43,990 or a little over 43% of the population as of October, 1999. According to the Oregon Department of Employment, the most significant reason for the low labor force participation rate is the number of retirees that make Douglas County their home as well as the number of children who have not yet reached the legal working age of 16.

Approximately half of Coos County's 61,400 residents live in the Coos Bay-North Bend area, the largest urban population center on the Oregon Coast. Since 1990, the largest growth among the cities in Coos County has occurred in Bandon (+605) and Coos Bay (+539). The Brookings-Harbor area in southern Curry County has about 10,000 residents, representing about 45% of the county's population of 22,000. Brookings has increased in population by about 1,100 (+25%) since 1990. Most of the population growth for Gold Beach (+604) was due to the annexation of a residential area north of the city in 1995. Douglas County's residents are concentrated along the I-5 corridor. Roughly 41% of the population live in the incorporated areas close to the interstate. Since 1990, most of the population growth in Douglas County has occurred in the Roseburg incorporated area. Roseburg has added 3,146 people, or 56% of the county's total growth. On a percentage basis, the fastest population growth (+33%) occurred in Sutherlin. By contrast, the unincorporated areas are down by 973, or by a negative 2%.

Labor force and Unemployment

Between 1988 and 1998, Coos County unemployment averaged 9.3% with Curry County at 7.9%. In 1999, preliminary estimates by the State Department of Employment put Coos and Curry rates at 8.5% and 6.9% respectively. In Douglas County, the unemployment rate dropped from 11.9% in 1992 to 8.0% in 1995. In 1998 the Douglas County rate rose to 9.3%. The jobless rate for Oregon over the past year is slated to average 5.5%. Overall, the unemployment rate in the region has historically been higher than the state and, recently, has been approximately double the national rate.

Per Capita Income

In 1997, per capita income for Coos County averaged \$19,494, only 82% of Oregon's statewide estimate of \$23,920. Curry County's per capita income figure was slightly higher at \$20,381, or 85% of the state estimate. The Douglas County 1997 per capita income level of \$19,056 is the lowest of the three counties at 80% of the state estimate.

Industrial Employment Projections

The Oregon Employment Department projects non-farm job growth for the state and for its various regions. The non-farm payroll jobs in Oregon are projected to grow by 18.5% in the ten year period from 1998-2008.

Coos and Curry counties are projected to increase by just 7.6% between 1998 and 2008, adding just under 2,100 jobs to the region's workforce. These two counties of our region will trail Oregon in percentage growth in all industries and have the slowest projected growth rate of any region in the state. Coos and Curry county's slow growth rate stems primarily from expected continued reductions in employment in natural resource industries such as wood products and fishing. Such growth as is projected to occur will do so to the extent that population continues to expand. Retirees are likely to be replacing some of the working-age population who choose to go elsewhere. On the other hand, Coos and Curry counties are projected to add 2,350 non-manufacturing jobs by 2008. Most of these jobs are expected to occur in trade and services. They will come primarily as the result of whatever population increases might occur with the accompanying growth in retirement income and other "non-earned" income.

Douglas County is projected to be among the slowest job growth areas in the state, although not as slow as Coos and Curry. The projected job growth rate is 14.2% over the 1998-2008 period. Douglas County's industrial structure is still highly dependent on manufacturing and, in particular, lumber and wood products. Fully 17% of total employment is in the lumber and wood products industry compared to 3% statewide. Lack of diversification makes Douglas County vulnerable to recessions, both at home and from other parts of the globe. This has led to a roller coaster ride in employment growth. Due to slower population growth, lower average income and wage levels, and an industrial base reliant on slow-growing or declining industries, Douglas County has experienced generally much slower economic growth than the statewide average.

Major losses of jobs in 1998 and early 1999 have slowed early improvements in the growth of jobs. The bulk of new jobs have come at service firms, trade businesses, and construction outfits. Together, these industries have accounted for most of the new jobs created in the county since 1990. In fact, these industries have added more jobs than the total net increase: 3,500 jobs versus 3,400 for all industries. The difference is due to losses of 1,950 in lumber and wood products during the time period.

By 2008, the Services industry is expected to have the greatest numerical increase in jobs in Douglas County. By 2008, jobs in the service sector are expected to grow by 1,960 or 26%. This growth is represented by continued but slowing growth in temporary help and employee leasing firms as well as computer-related services, such as computer support, as the economy continues to shift towards increased automation. With a slower growing, albeit aging, population and increased efforts to contain health care costs, the health services sector is expected to see substantial, although slowing, employment growth.

Regionally, job losses in our traditional natural resource based industries, such as timber, agriculture and fisheries, have stimulated the need for a more diverse economy. The region has experienced an increase in service jobs, many of which pay relatively low wages and a decrease in timber related jobs that formerly provided high wages with low skilled workers. As a result, low skill/high wage jobs are a thing of the past.

Many of the communities in our region lack sufficient management/technical capacity required for quality project development, implementation and management. As a result, funds may be allocated for technical assistance for the development and management of quality projects and for assessment of financing opportunities to accomplish the creation of a positive economic and community development climate, while assisting with business finance and job growth.

Local capacity building has been identified as an important tool to increase local participation in economic growth through project development, implementation and management. While regional efforts can and will continue to contribute significantly to such efforts, grass roots participation by small rural communities in various economic and community development programs will depend on the availability of resources to ensure their participation.

Resource Inventory

The Coos, Curry, Douglas Regional Investment Board has identified several significant economic strengths, weaknesses and opportunities associated with the region. Identifying these elements of the economy assisted the board in defining its long-term vision for the region and in creating the region's goals and priorities.

The region's primary economic strengths identified by the board include the traditional natural resources industry base of fisheries, forest products and agriculture. The board also identified quality of life attributes for the region; the diverse coastal, inland, and mountain which make for quality lifestyles.

Additionally, the moderate climate, the recreation and isolation opportunities and the proximity to California markets were identified as valuable assets for the region's visitor industry.

The region's primary economic weaknesses identified by the board include the downsides to some of the region's strengths. Declining employment and vulnerability to environmental issues in the resource industries of fisheries, forest products and agriculture, together with the seasonal nature of work in these industries has affected the region's economy and has the potential to do further harm.

Similarly, the board identified as a weakness the lack of a diversified employment base (beyond the natural resource industries), low job skills, lack of an established and well-known training system for easy utilization by employers and poor basic and employability skills.

Also identified as a weakness in a recent Current Workforce Strategy session held in Douglas County is the challenge to show employers the value of investing in training for their employees.

Additionally, a lack of living wage jobs, inadequate ready-to-build industrial sites, to attract such jobs and transportation access limitations in parts of the region were cited as weaknesses. Paralleling these weaknesses, inadequate sewer, water and other infrastructure in a limited inventory of suitable industrial sites and/or facilities were cited.

The region's primary economic opportunities identified by the board include a motivated workforce and, in some areas of the region, a good inventory of land zoned for industrial and agricultural purposes. The board also cited as opportunities for the region its strong community support and partnerships and a well-developed education system through the community college level, with a variety of human resource training programs available. While seen as generally positive, workforce motivation and the current education system are inadequate if substantial progress is to be made to provide better jobs.

These factors together give an insightful detailing of the region's economy that provides a basis on which the region's vision, goals and activities are built.

The specific resources and implementation barriers identified by the Board are listed below:

Unique/Significant Resources:

- Traditional natural resources industry base: forestry, fisheries, agriculture
- Proximity to California markets
- Quality of Life attributes: diverse coastal, inland, mountain terrain; moderate climate; recreation and isolation opportunities
- Diverse, unspoiled tourism product, especially eco-tourism and heritage tourism products
- Capable economic development organizations (CCD, financial packaging, Industrial and Economic Improvement Boards)
- Attractive work/lifestyle
- Strong timber industry anchor
- Motivated Work Force
- Favorable West Coast location
- Good inventory of land zoned for industry
- Community support/partnerships
- Well-developed education system through the community college level
- A variety of human resource training programs available
- Financial institutions ready to assist
- Potential for timber industry, included secondary and value-added manufacturing

Development Implementation Barriers:

- Seasonal nature of resource industry work
- Lack of diversified employment base (beyond natural resource industries)
- Insufficient living wage jobs
- Distance from major metro markets
- Large federal land ownership
- Transportation access limitations (especially from I-5 to the Coast)
- Inadequate ready-to-occupy industrial sites
- Vulnerability to environmental concerns
- Declining timber, agriculture and fisheries industry job base
- Inadequate infrastructure (highways, marine, air)

- Inadequate local public works (sewer, water) in many communities
- Limited inventory of suitable sites, facilities
- Lack of diversity in work force (training, skills)
- Insufficient number of jobs
- Absence of a four-year college
- Insufficient debt and equity capital
- Insufficient management assistance for start-ups, expansion
- Lack of central information source with state agencies, other regulating entities
- Some traffic congestion on key roads, streets
- Heavy reliance on timber industry for living wage jobs
- Lack of Natural Gas in parts of the region
- Aging rail infrastructure
- Lack of modern telecommunications infrastructure
- Lack of sufficient economic and community development resources in some areas in the region

Long Term Economic and Community Development Priorities

Based on our Regional Assessment, Resource Inventory and Barrier identification for the Region, the following Regional and Rural Investment Fund Economic and Community Development priorities are established:

1. Diversify the region's economic climate by sustaining and creating jobs higher than the each county's average wage.
2. Support the region's communities which have been left out of Oregon's economic expansion and diversification. OAR 123-055-0300 (1) (a)
3. Help companies that are starting up or are already in business in our Region to compete globally. OAR 123-055-0300 (1) (b)
4. Ensure that the strategies developed to enhance economic and community development in the region reinforce the Region's long-term prosperity and livability. OAR 123-055-0300 (1) (c)
5. Coordinate regional efforts for economic and community development, education, workforce development, natural resource management, and other civic activities. OAR 123-055-0300 (1) (d)
6. Improve and expand physical infrastructure of rural areas to support existing demands and new economic growth.
7. Improve community facilities in rural areas to enhance the rural lifestyle.
8. Coordinate and expand rural programs that market or develop a clearly defined geographic area or its products.
9. Increase the work-related skills of the rural emerging, current and transitional workforce.
10. Improve transportation and telecommunications infrastructure in and to rural areas.
11. Improve the quality of life, including recreational, health, public safety, educational, cultural, housing, human services and beautification improvement opportunities.
12. Increase investment in human resources in the region.

In implementing these priorities, it is expected that the CCD Regional Investment Board and its partners will work towards meeting the Governor/s Quality Development Objectives* outlined below:

Less Sprawl - "Promote compact development within urban growth boundaries to minimize the cost of providing public services and infrastructure and to protect resource land outside urban growth boundaries."

The Right Mix of Development - "Give priority to a quality mix of development that addresses the economic and community goals of a community and region."

Greater Choice in Modes of Transport - "Encourage mixed use, energy-efficient development designed to encourage walking, biking and transit use (where transit is available)."

Cost-Effective Public Services - "Support development that is compatible with a community's ability to provide adequate public facilities and services."

Protection of the Environment - "Facilitate development that is compatible with community and regional environmental concerns and available natural resources (e.g., available water, air quality, etc.)."

Proper Balance Between Jobs and Housing - "Support development that provides for a balance of jobs and affordable housing within a community to reduce the need to commute long distances between home and work, thereby minimizing personal community costs as well as the public and societal cost of expanding the transportation infrastructure."

() From Governor's Executive Order 97-22, December 16, 1997 - "The state shall strive to ensure that its programs and activities help build and maintain quality communities which have clean air and water, housing that is affordable to community residents, a balance of jobs and housing in proximity to one another, development patterns that minimize the cost of public services, and a mix of residential, commercial, industrial and institutional uses that supports a balanced transportation system."*

Barrier Analysis and Long Term Implementation Plan

Development of the CCD Regional Investment Plan is an on-going process involving continuing identification of short-term and long-term actions to improve economic and community development in the region. The CCD Regional Investment Board is involved in a collaborative working relationship with local leaders in the public and private sector along with the State Community Solutions Team, OECD staff and federal partners.

The Plan priorities identified above are complex because they encompass such a wide range of issues. The CCD Regional Investment Board does not have the money nor the expertise to implement the Regional Investment Plan alone in the short or long term. Rather, the Board hopes to serve as a catalyst for regional discussion and action by private, local, state and federal partners to address the most pressing economic and community development issues in the CCD region. Collaboration among the private sector, local government, state government, and federal government is essential to effectively implement the Plan.

On the local level, the most efficient investments of resources in economic and community development will result if both private and public sector organizations agree on and work off of the same planning document. It is the intent of the Board that this Plan be the first step in the development of a new comprehensive regional planning process for identifying and addressing critical regional and community issues.

The intent of this planning process is to begin to build collaboration between both governmental and non-profit organizations that address economic and community development issues in the region by integrating each entity's unique planning process into a single regional plan.

In the short-term, collaborative funding of projects contained in other adopted economic, community, or capital development plans within the region is encouraged as appropriate. Potential projects could be identified in local jurisdiction capital development plans, transportation system plans, regional priorities or needs inventories, community economic revitalization team priority listings, and other community plans/priorities. In the long-term, efforts should be made to consolidate and streamline the planning processes in order to develop a more rational, less expensive and more integrated planning process for the region.

If successful, the new planning process would bring together current regional planning efforts to assimilate the interrelated issues of economic and community development, workforce development, transportation, housing and the environment.

The region's current state of economic planning and development suffers from duplication and funding disconnect. Numerous organizations carry on some form of regional planning activities, many with overlapping functions and unclear jurisdiction. There is a perceived disconnect between community

needs and actual funding decisions, leading to questions as to whether timely information is being conveyed to our state and other funding partners. Finally, too much planning is taking place within a narrow, issue-specific scope - there is no mechanism that ensures that planning takes place with a cross-discipline approach and that expensive, duplicative planning programs are curtailed or eliminated.

Long-term, the collaboration of the private and public sector in the region will be more effective if these entities can express a common regional agenda to state and federal legislators and funding agencies.

State and federal recognition of CCD Regional Investment Board priorities as expressed in this plan is also essential to effective implementation. This region needs state and federal agencies to make their funding resources available in an easily-accessible and timely manner. Lending and granting decision processes need to be streamlined so that resources are more easily acquired and managed by local jurisdictions. Also, state and federal agencies need to make sure that adequate resources are devoted to managing loan and grant programs so that administrative details such as contracting or monitoring do not become a barrier to effective local and regional development. Finally, the CCD region believes that its citizens would be best served if state and federal agencies shifted resources and decision-making to local governments and communities based on measurable outcomes.

In addition to these general comments on state and federal cooperation needed to implement the Plan, there is a specific issue identified in the plan where state and federal assistance is essential. The CCD Regional Investment Board is looking to its state and federal partners for assistance in identifying a stable funding source for fostering human resource capacity in small towns. With minimal staffing levels, the small communities and towns of this region find it difficult or impossible to compete for state and federal resources that are needed to make their communities healthy and productive. This lack of capacity is a major reason this and other similarly rural regions have not been able to fully participate in the improved Oregon economy to the degree realized by the urban regions of the State.

Short Term Economic and Community Development Priorities

For the current biennium's allocation of State Lottery Funds, it is the intent of the Regional Investment Board to focus on Community Development, Economic Development and Regional projects as follows:

Community Development

Community Facilities - Includes, but is not limited to, such projects as special street lighting for downtown areas, community centers, park enhancements and libraries. It could also include public/private investments that lead to downtown capital enhancements such as enhanced pedestrian facilities, additional landscaping, parking improvements and storefront rehabilitation.

Infrastructure/Technology - Includes, but is not limited to, water, sewer, transportation, storm drain, dock, pier, wharf and telecommunications/technology projects for which Regional/Rural Investment funds can be used to assist communities with their local share to leverage federal, state, private sector or foundation funds. May include public safety projects designated as high priority by a city or county. Small stand-alone projects are encouraged involving significant local funding participation.

Community Services - Includes, but is not limited to, child care, youth services, senior services, health care and other projects designed to provide access to residents of the region's rural communities. Projects in this category may include start-up assistance and one-time investments as opposed to ongoing financial support for operating and maintenance costs.

Economic Development

Infrastructure/Technology - Projects in this category include, but are not limited to, water, sewer, street, storm drain, transportation and other infrastructure projects focused on development of publicly owned industrial property in the region. Could include major transportation projects within the region. Emphasis will be on leveraging Regional/Rural Investment funding to match local, state and federal funding for such projects. Includes assistance in the identification of infrastructure deficiencies and capacity needs as well as the development of financing & implementation strategies for infrastructure construction on both a community and regional level. Could include intra-region projects.

Tourism - This category includes, but is not limited to, projects designed to help market geographic areas within the region or its products. In addition to marketing programs, this category could also include projects designed to enhance the tourism experience such as interpretive centers, kiosks, restrooms or event centers. In accordance with OAR 123-057-0470, all marketing projects funded in this category will be required to demonstrate consistency with regional and statewide marketing programs.

New Business Development - This category includes, but is not limited to, outreach programs and public projects that produce new jobs in the region. Includes projects to attract & recruit businesses that create primary jobs in the region through the support of cooperative marketing and public-private collaboration to enhance economic development opportunities. Projects designed to create industry activity, investment and related jobs will also need to comply with the provisions of OAR 123-057-0470.

Business Retention and Expansion - Includes, but is not limited to, projects designed to enable businesses to stay in an area and expand such as telecommunications improvements. Also includes public/private projects that lead to downtown capital enhancements such as enhanced pedestrian facilities, additional landscaping, parking improvements, and storefront rehabilitation. Also needs to comply with OAR 123-057-0470.

Workforce Development & Training - Includes, but is not limited to, projects designed to provide job training/ job diversification and upgrading skill development. Includes projects that support efforts to ensure the availability of training & education as a means for upward mobility of current workers. Also includes projects to focus existing public workforce development resources on transferable skills.

Short Term Implementation Plan

The Memorandum of Understanding between the Coos, Curry and Douglas County Commissions, requires that Regional/Rural Investment funds project allocations produce funding decisions roughly equivalent to the State Lottery Allocations by County. In order to meet that requirement and to include sufficient information in the plan for public and agency review, the Regional Investment Board has conducted outreach through the use of sub-committees taking input in each County. Based on that process, the Regional Investment Board has determined that the plan should include target allocations. As part of the actual allocation process, it may be necessary for the Board to adjust the initial target allocations based on further determination of need. The currently planned target allocations are shown below:

Table 5 - Target Allocations of Regional/Rural Investment Funds

Project Category	Regional Investment Fund	%	Rural Investment Fund	%	Total	%
Community Development	\$ -		\$ 744,614	90.85	\$ 744,614	40.17
Community Facilities						
Infrastructure/Technology						
Community Services						
Sub-Total:	\$ -		\$ 744,614	90.85	\$ 744,614	40.17
Economic Development	\$ 671,255	64.92	\$ -		\$ 671,255	36.21
Infrastructure/Technology						
Tourism						
New Business Development						
Business Retention/Recruit.						
Workforce Dev./Training						
Sub-Total	\$ 671,255	64.92	\$ -		\$ 671,255	36.21
Immediate Opportunity Proj.	\$ 90,000	8.70	\$ 60,000	7.32	\$ 150,000	8.09
Multi-Region Set Aside	\$ 164,132	15.87	\$ -		\$ 164,132	8.85
Sub-Total	\$ 925,387	89.49	\$ 804,614	98.17	\$1,730,001	93.33
Administration/Staff Support	\$ 78,650	7.61	\$ -		\$ 78,650	4.24
Contingency	\$ 30,000	2.90	\$ 15,000	1.83	\$ 45,000	2.43
GRAND TOTAL	\$1,034,037	100.00	\$ 819,614	100.00	\$1,853,651	100.00

Rather than limiting funds to pre-selected industry sectors, the Coos, Curry, Douglas Regional Investment Plan and Rural Action Plan encourages projects and activities that diversify the local and regional economy. In addition, the Board has determined that Regional Investment fund allocations will be targeted to broader, multi-community projects while the Rural Investment Fund allocations will be targeted to be community specific. The allocation categories include a category entitled Immediate Opportunity projects. This category anticipates that projects will be developed and will need funding after the initial allocation process. The Regional Board will delegate the allocation of these immediate opportunity funds to the County Sub-committees. Funds will be focused on implementation of local community priorities. Given the need to grow and diversify the region's economy, local community projects that focus on strengthening a community's economic environment will receive highest priority.

Regional Investment Fund Criteria

The following criteria will be considered by the Board when making Regional and Rural Investment Fund grant awards:

- Extent to which the project addresses the regional long and short term priorities established by the Board in the Coos Curry Douglas Regional Investment Plan
- Extent to which the project is consistent with the Governor's Quality Development Objectives
- Linkage with local community needs and priorities

- Extent to which the project retains or creates or leads to new jobs
- Extent to which the project is ready-to-proceed
- Extent to which the project will leverage additional matching funds
- Extent to which the project is feasible and the performance/outcomes of the project can be measured in relation to regional benchmarks
- Qualifications of applicant
- Local community development impact

Schedule for Allocation of Regional and Rural Investment Funds

Action Item Targeted Completion Dates:

- Completion and adoption of Regional Investment Plan October, 2000
- Call for projects, review and approval, contract completion March, 2001
- Multi-Region projects allocations, if any ASAP
- Immediate Opportunity Projects, none later than May, 2001

Multi-Region Projects

At this time, no specific multi-region projects have been identified, although the CCD Regional Investment Board is open to all ideas for such projects. Areas of particular interest identified by the Board include Transportation, Telecommunications, Natural Gas delivery and Geographic Information Systems (GIS) projects that would benefit the region.

Other areas where there may be logical opportunities for joint investment activities include:

- Workforce Training and Development
- Computer/Internet Training in rural communities
- Tourism marketing
- Economic Development Marketing and Outreach
- Management Training

¹ Prepared by the Coos, Curry, Douglas Regional Investment Board with assistance from the CCD Business Development Corporation 744 SE Rose St., Roseburg, Oregon 97470, September, 2000, <http://www.ccdbusiness.com/extra/investplan.htm>

DOUGLAS COUNTY TELECOMMUNICATIONS PROVIDERS²

Providers

Cascade Utilities

<http://www.cuaccess.net/index.htm>

Elkton

Scotsburg

Century Tel of Oregon, Inc.

<http://community.centurytel.net/>

Camas Valley

Drain

Glide

North Umpqua

Yoncalla

Charter Communications - Roseburg

<http://www.charter.com/default.asp>

988 W. Harvard

Roseburg, OR 97470

Citizens Telecommunications Company of Oregon

http://www.czn.net/db/template/irxml_home.xml

<http://www.frontieronline.com/db/template/home.xml>

Azalea

Canyonville

Days Creek

Glendale

Myrtle Creek

Riddle

Douglas Electric Cooperative

<http://www.douglaselectric.com/>

Douglas FastNet - coming in Fall 2002

Qwest

<http://www.qwest.com/>

Oakland/Sutherlin

Roseburg

Winston

Verizon

<http://www22.verizon.com/>

Reedsport

Competitive Telecommunications Providers

This is a list of companies with authority to operate - it may not reflect actual service provided at any given time. <http://www.puc.state.or.us/telecomm/compro.pdf>

Competitive Local Exchange Carriers (CLECS)

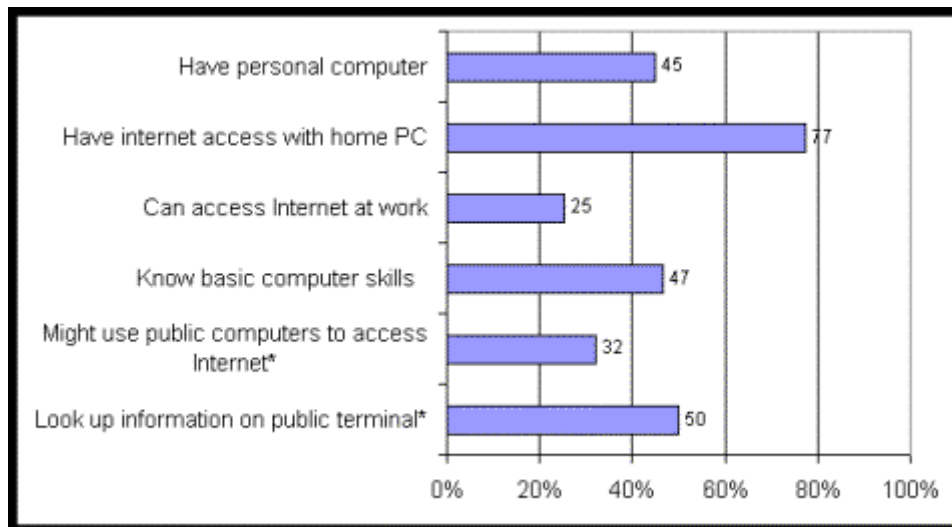
Certified in Oregon as of 10/15/2001. <http://www.puc.state.or.us/telecomm/clec.pdf>

² Source: <http://www.puc.state.or.us/>

OREGON HOUSEHOLD TELECOMMUNICATIONS SURVEY - COOS, CURRY, DOUGLAS³

As one part of a continuing effort to better serve the needs of Oregon residents, the Oregon Economic and Community Development Department (OECDD) contracted with the Oregon Survey Research Laboratory (OSRL) to conduct a representative survey of households on a variety of telecommunications issues. OSRL conducted a random-digit-dial (RDD) telephone survey of 1,696 households January - February 1999. (See Appendix 1 for further information, including the survey instrument). This first set of charts reflects the aggregated findings for Coos, Curry, and Douglas counties. Following that are the Douglas County findings. Both sets are included for comparison purposes.

Figure 1 - Computer and Internet Use



Very Likely and somewhat likely

Figure 2 - Internet service provider cost

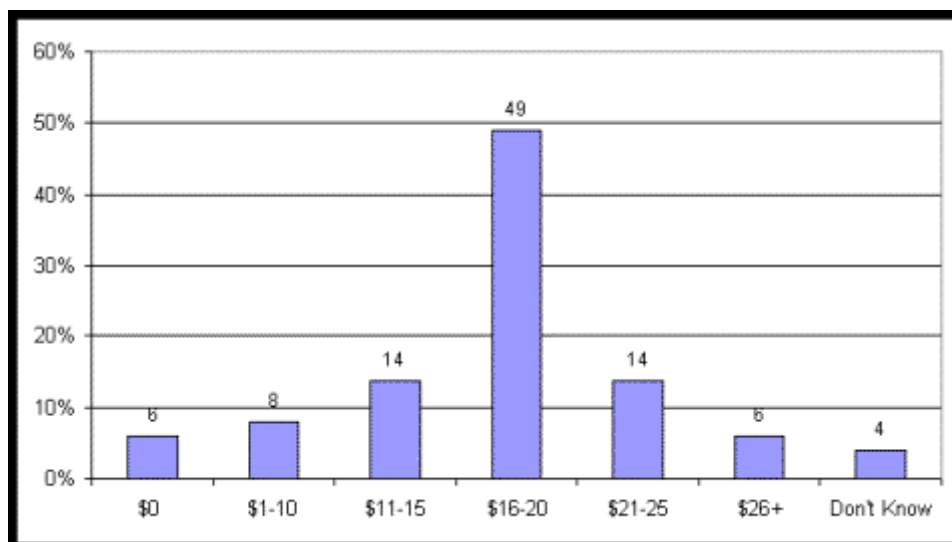


Figure 3 - Amount willing to spend per month for a particular ISP service

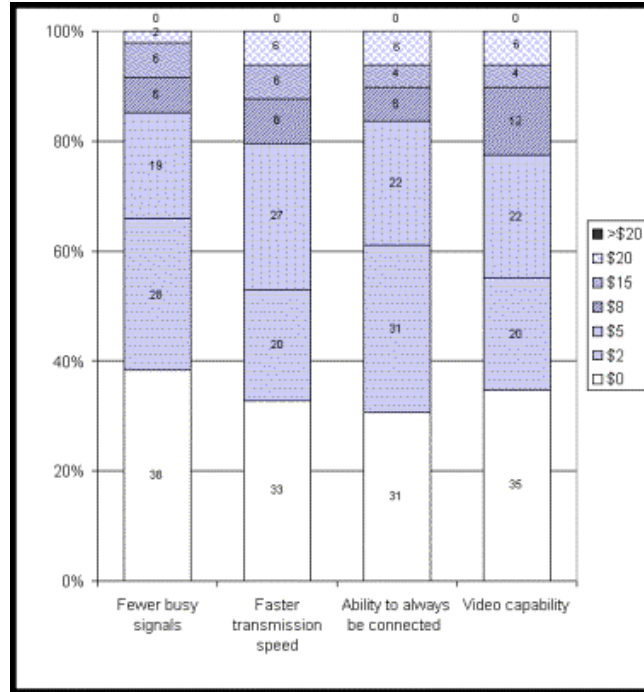
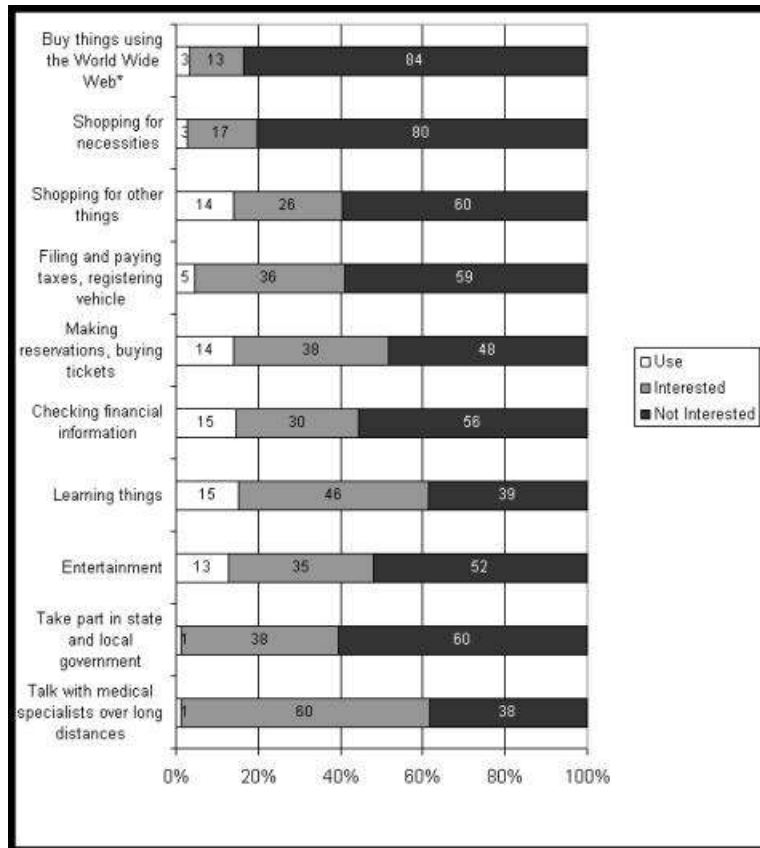


Figure 4 - World Wide Web use



Categories are often, sometimes, and rarely/never.

Figure 5 - TV and Cable

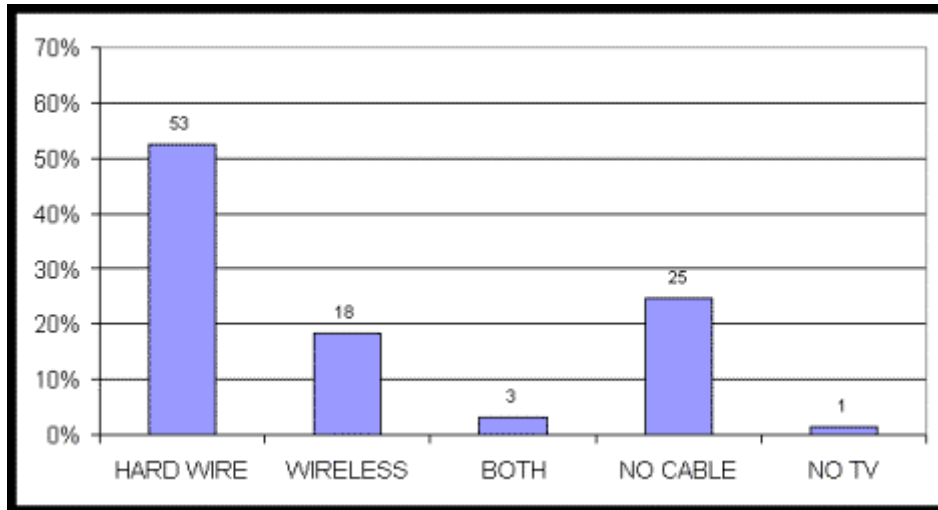


Figure 6 - Typical monthly telephone bill

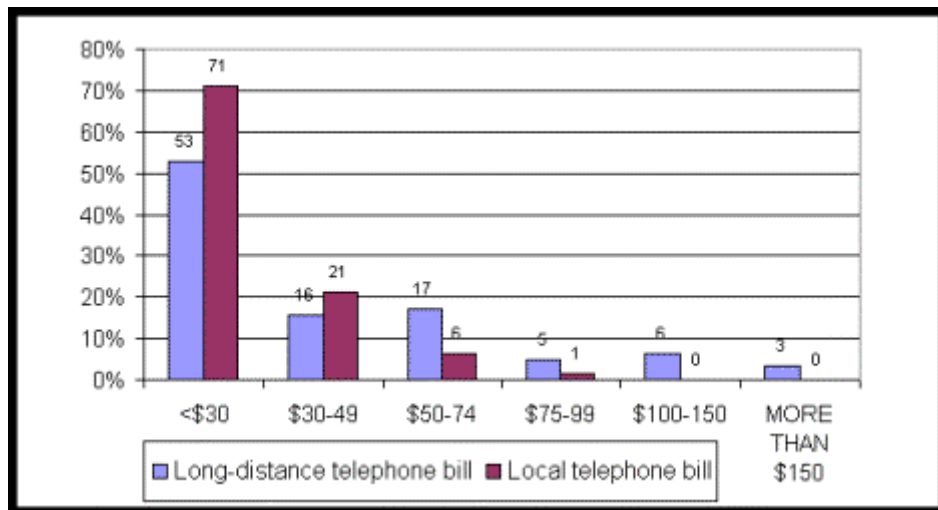


Figure 7 - Satisfaction with local telephone service

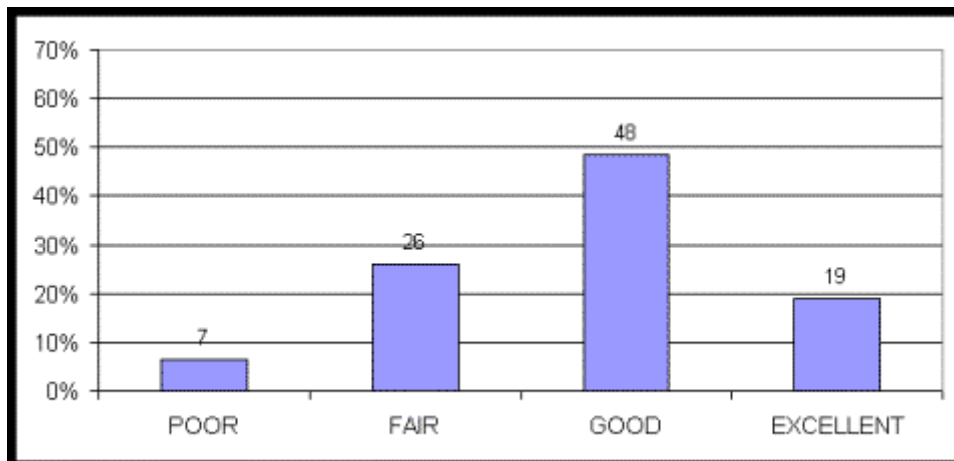


Figure 8 - Number of telephone users per household

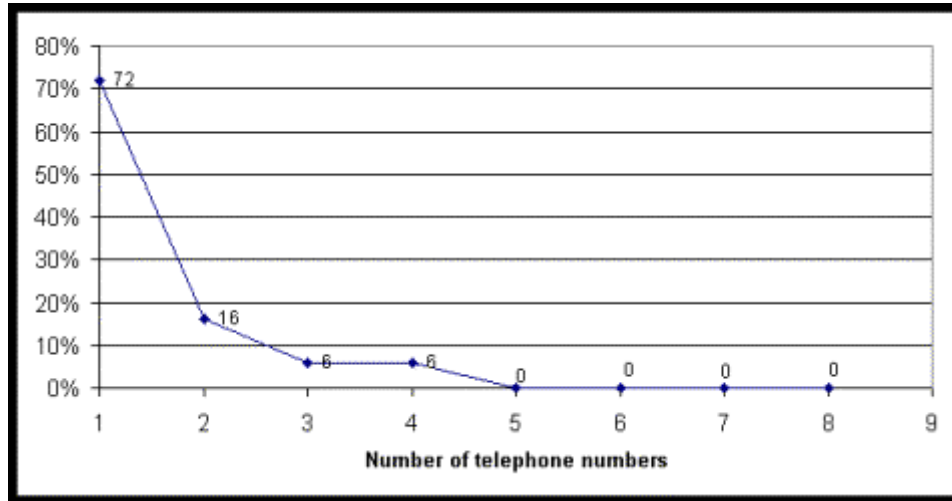


Figure 9 - Plans for adding a second telephone line and most willing to pay for it

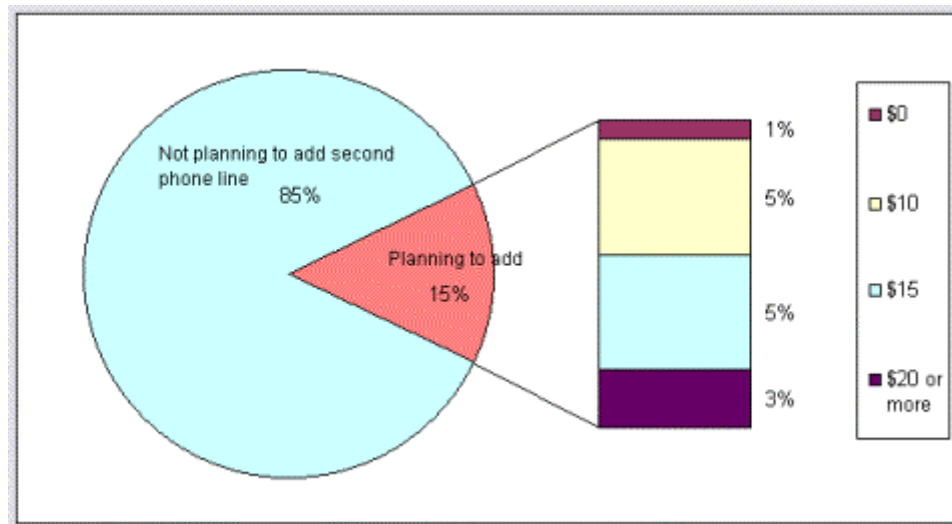


Figure 10 - Use of secondary lines

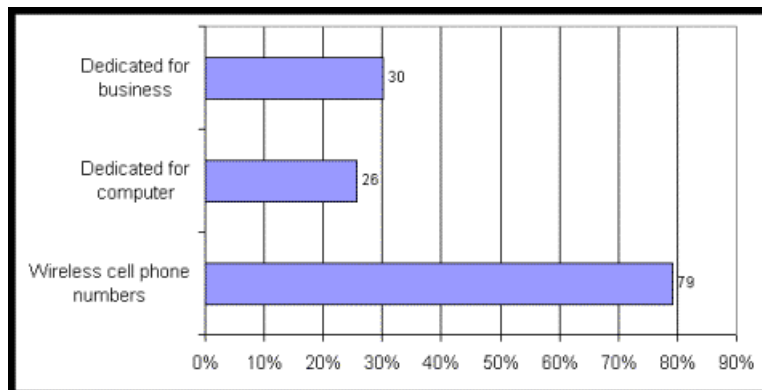


Figure 11 - Fax and other special phone services

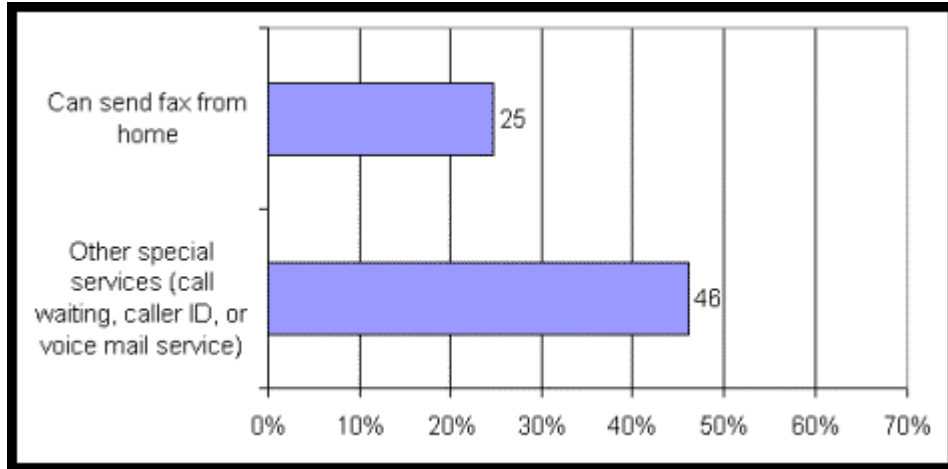
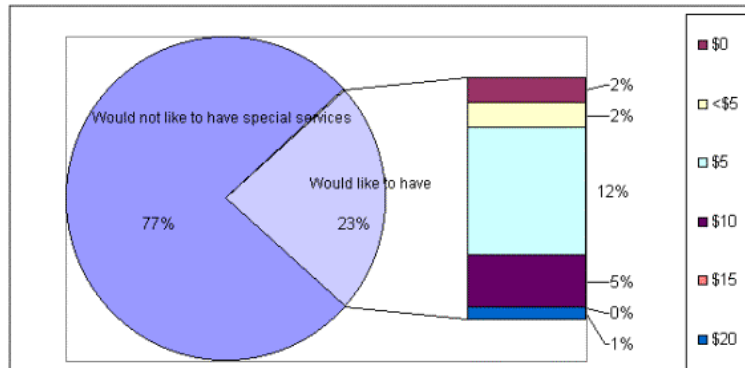


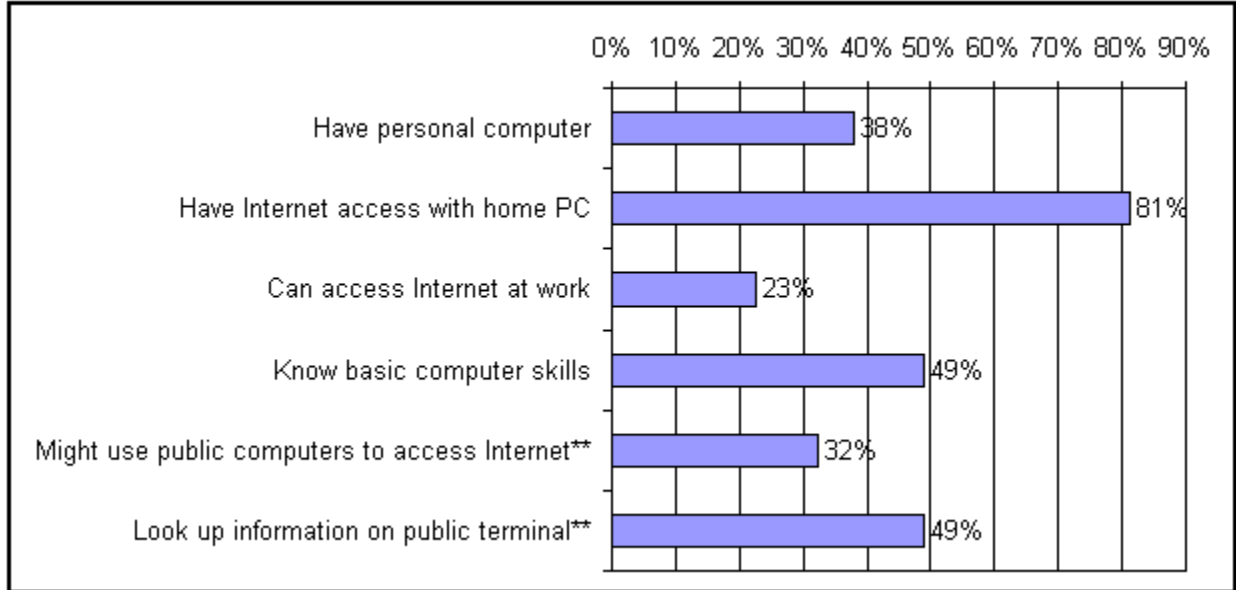
Figure 12 - Like to have other services (call waiting, caller ID, voice mail service) and most willing to pay for them



³ Source: <http://darkwing.uoregon.edu/~osrl/telecomoedd/frmtelecom.htm>

OREGON HOUSEHOLD TELECOMMUNICATIONS SURVEY WINTER 2001 - REGION 4 (DOUGLAS COUNTY)

Figure 13 – Computer and Internet use



** = Very likely/somewhat likely

Figure 14 – Internet service provider cost

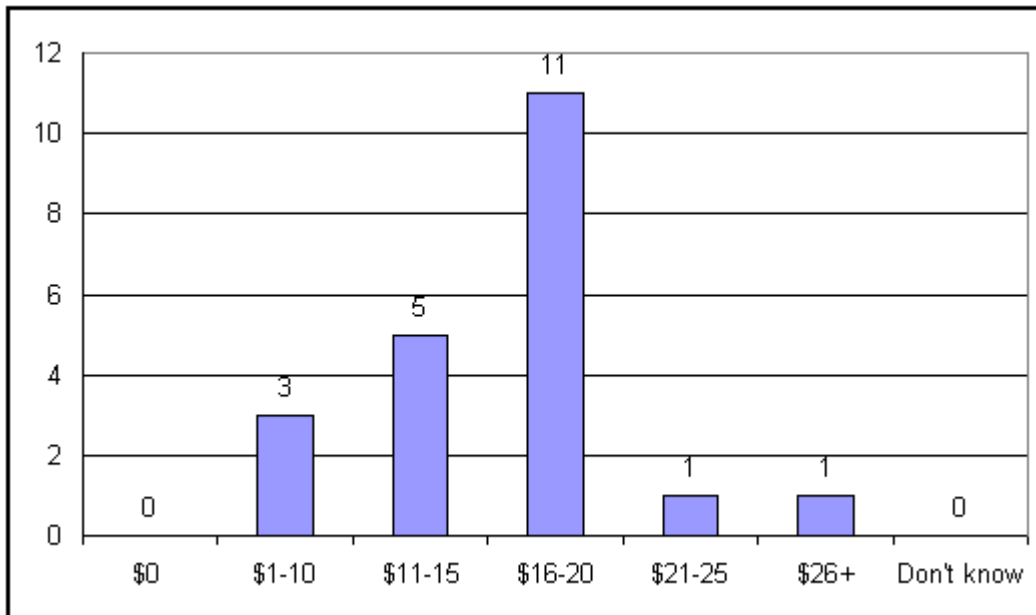


Figure 15 - Amount willing to spend per month for particular ISP service

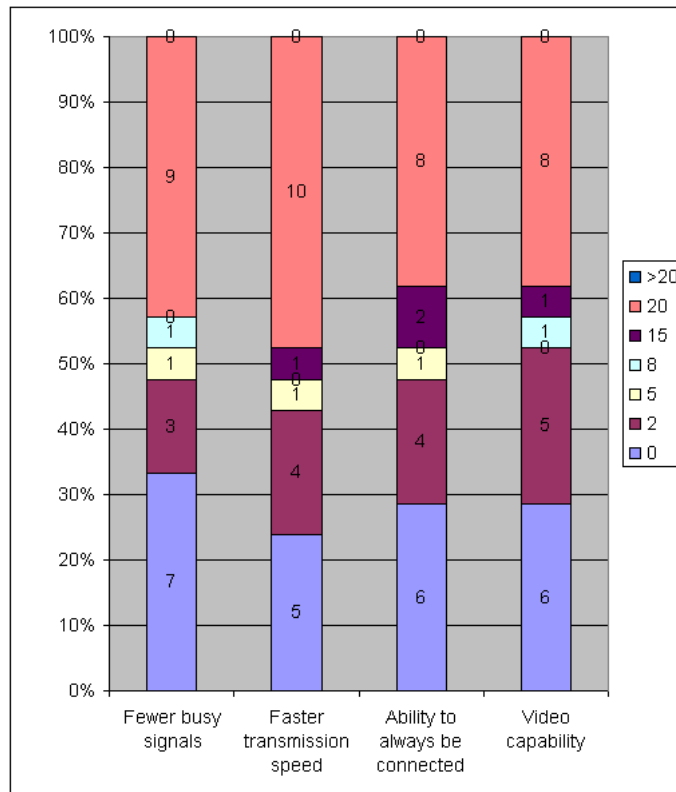
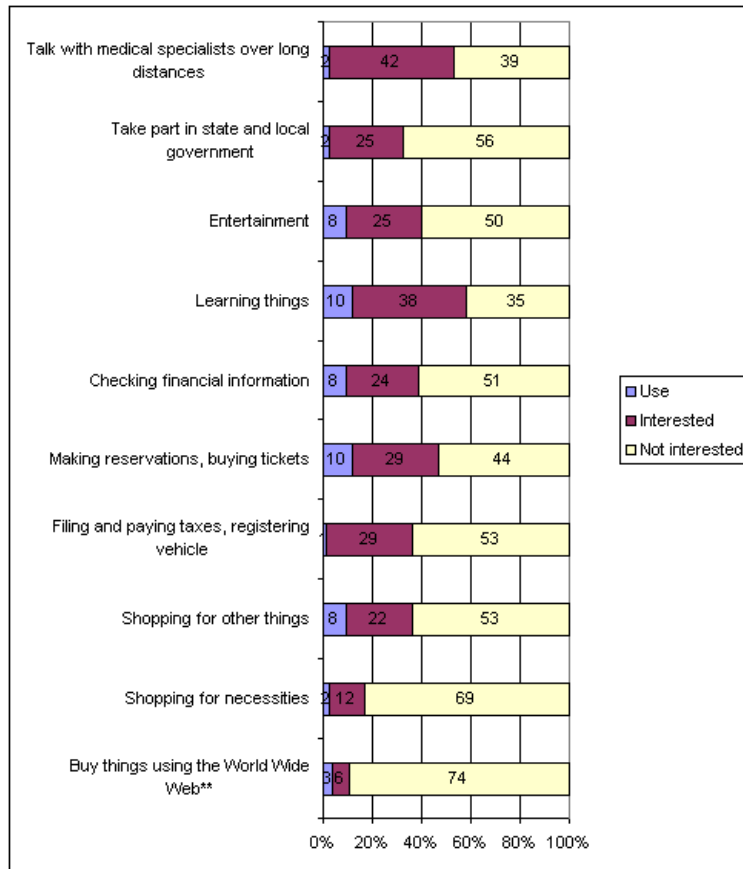


Figure 16 – World Wide Web use



** Categories are often, sometimes, and rarely/never.

Figure 17 – TV and cable

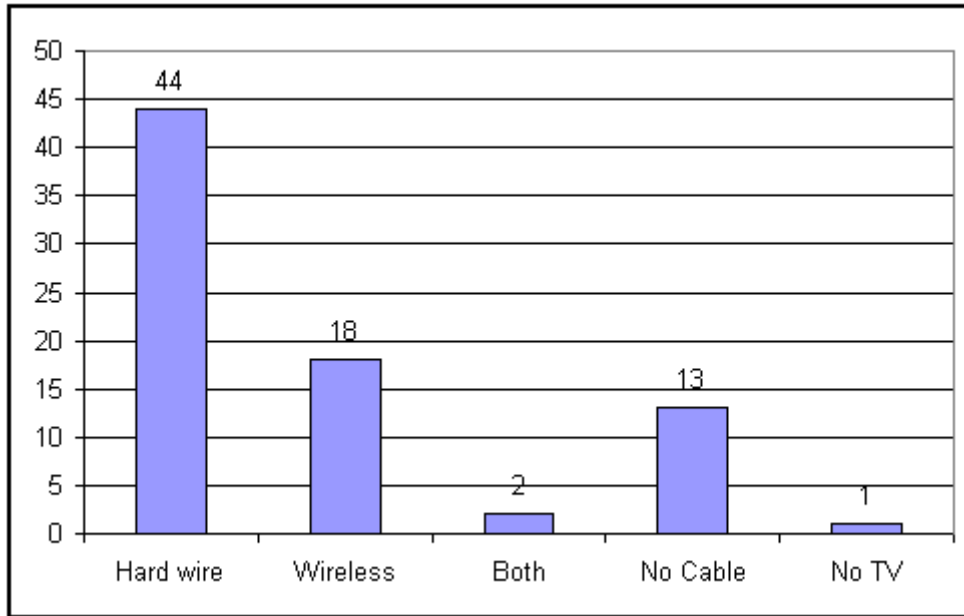


Figure 18 – Typical monthly telephone bill

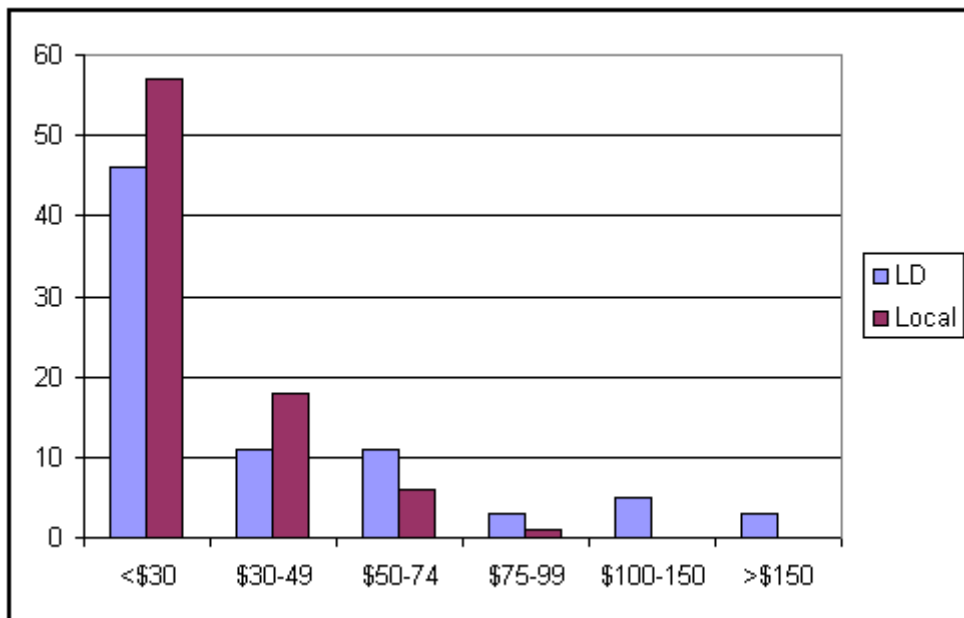


Figure 19 – Satisfaction with local telephone service

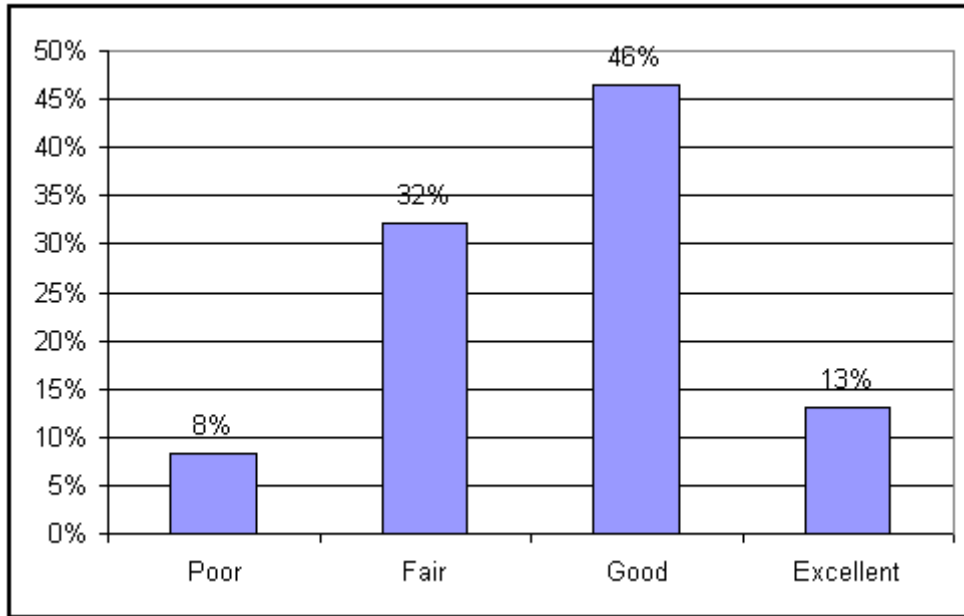


Figure 20 – Number of telephone numbers per household

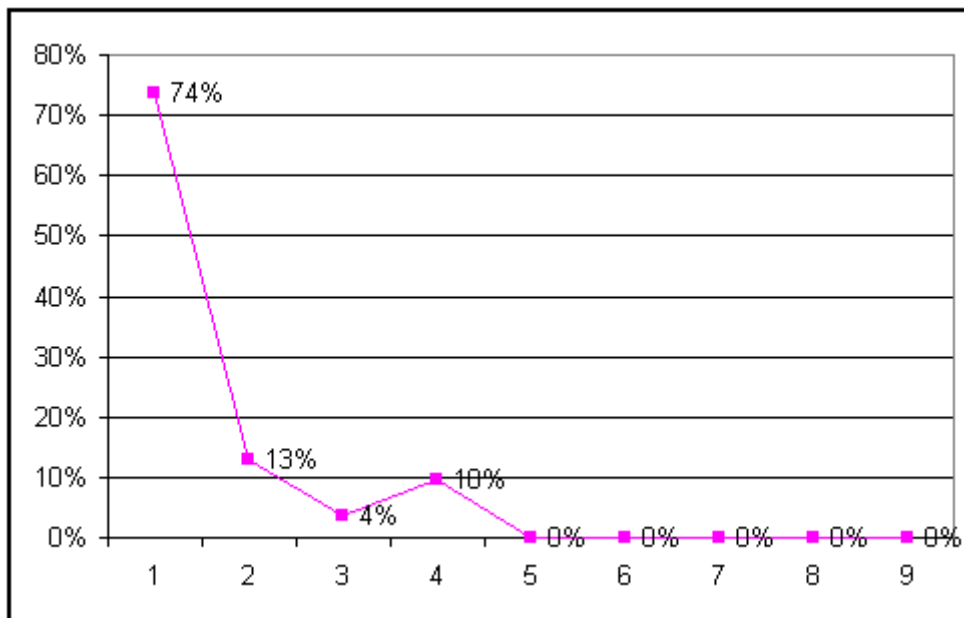


Figure 21 – Plans for adding a second telephone line, and most willing to pay for it

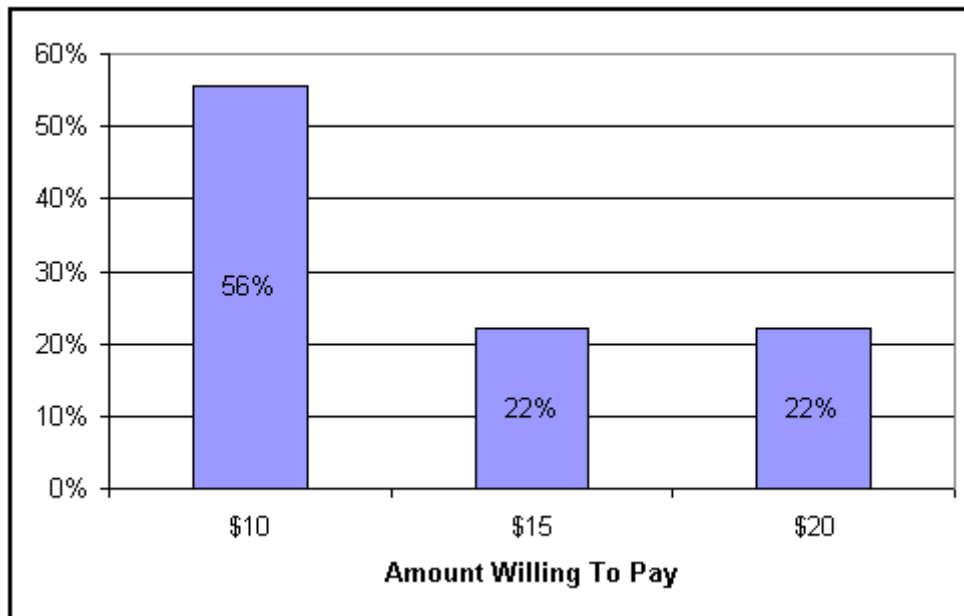
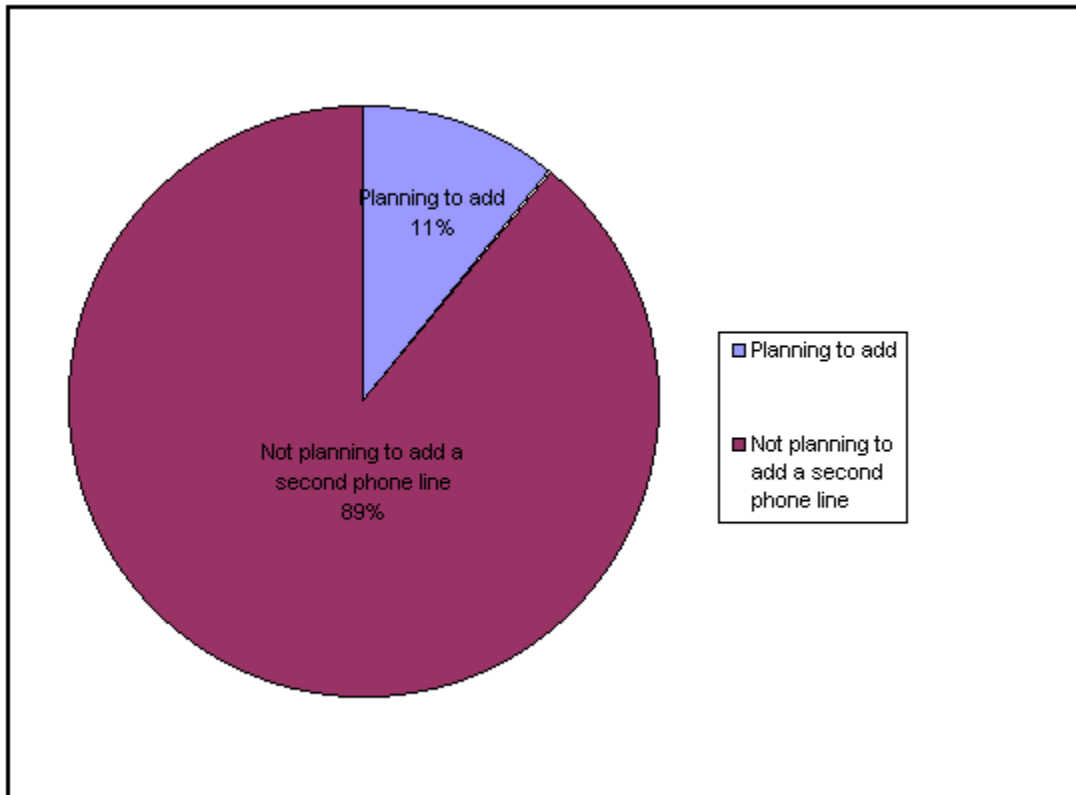


Figure 22 – Use of secondary lines

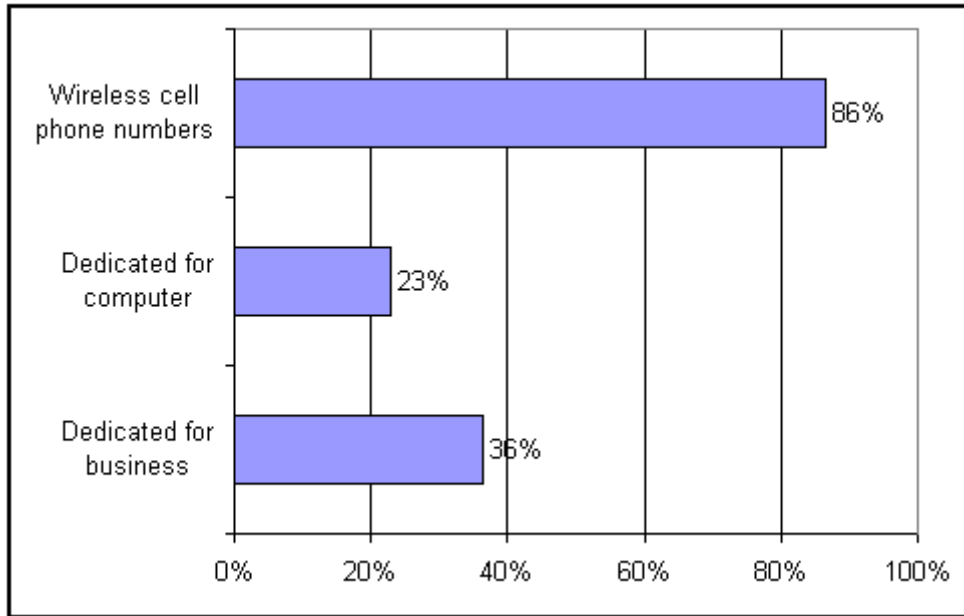


Figure 23 – Fax and other special phone services

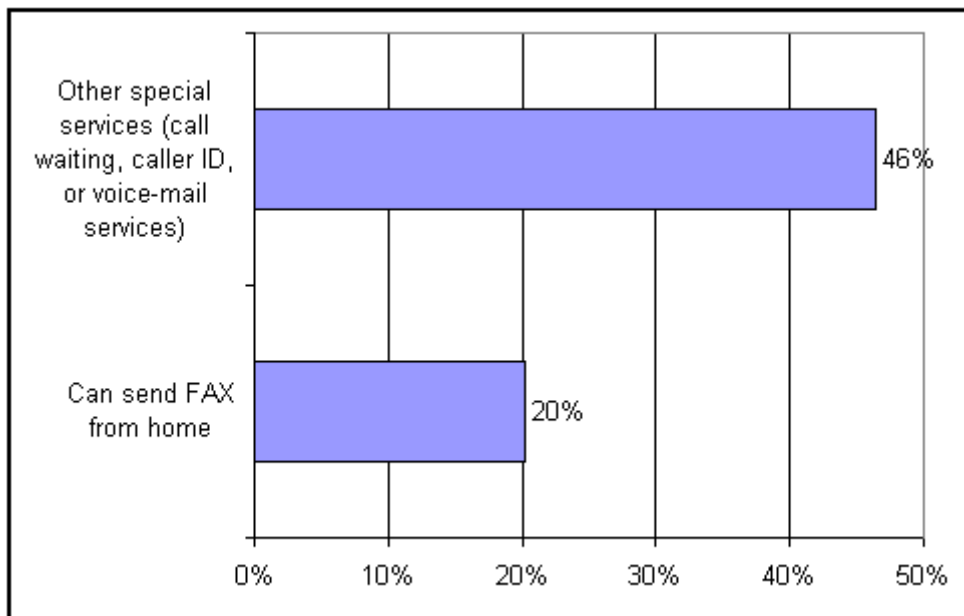
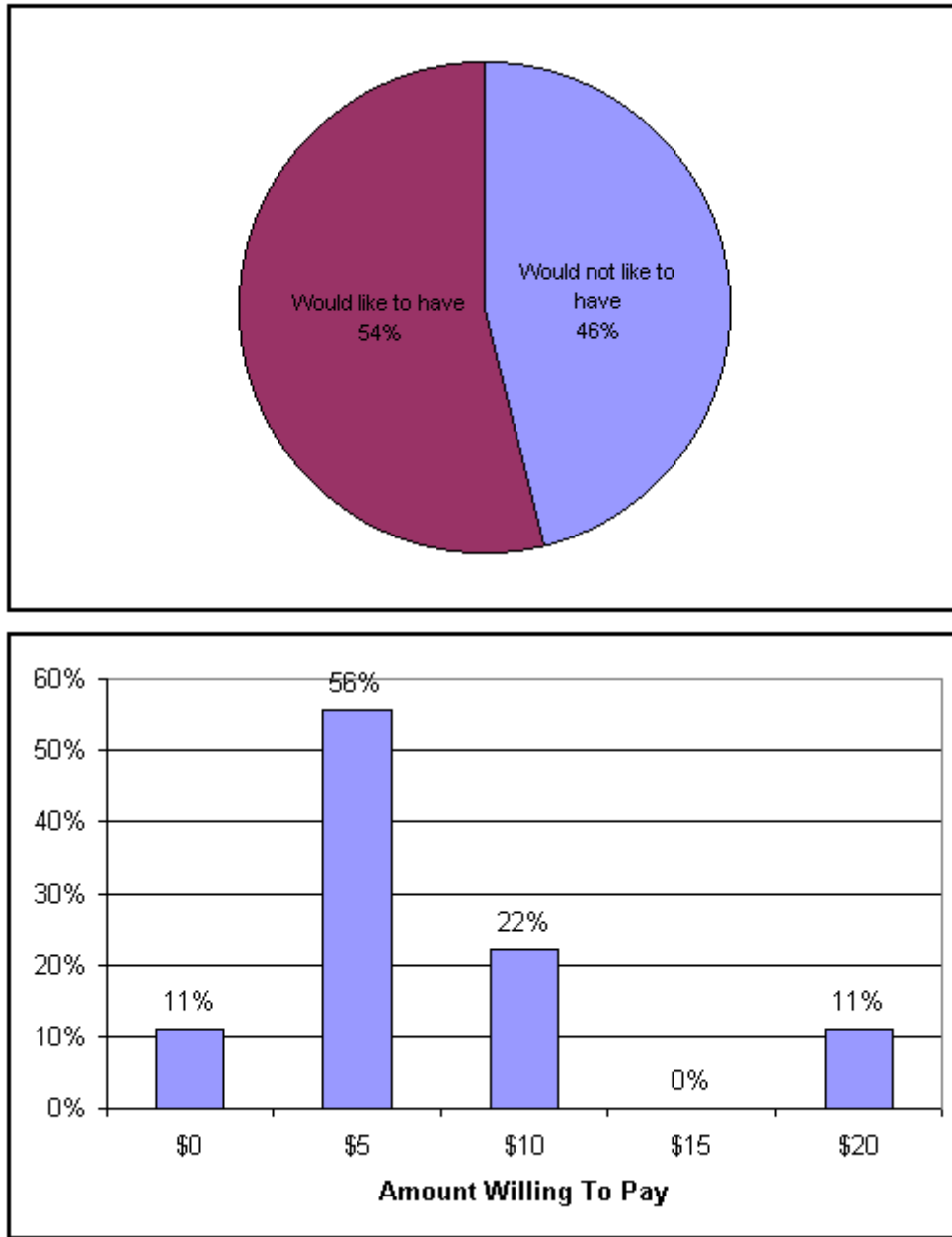


Figure 24 - Like to have other services (call waiting, caller ID, voice mail service)



⁴ Raw data provided for Douglas county results by Oregon Economic and Community Development Department, "Oregon Household Telecommunications Survey," Winter 2000, Methodology and Results, By Toshihiko Murata, Project Director, <http://darkwing.uoregon.edu/~osr/telecomodd/frmtelecom.htm>. The raw data was converted into the charts shown on this section by John Irwin, Consultant, www.callineb.com.

SB 622 SURVEY OF CRITICAL AND COMMUNITY USERS⁵

March 2000 Needs and Priorities Survey Results/Reports conducted as part of the groundwork for the SB 622 project preparation process. This is a separate survey from the preceding survey results.

Figure 25 - Ratings of Local Telephone Service - Critical Users Survey

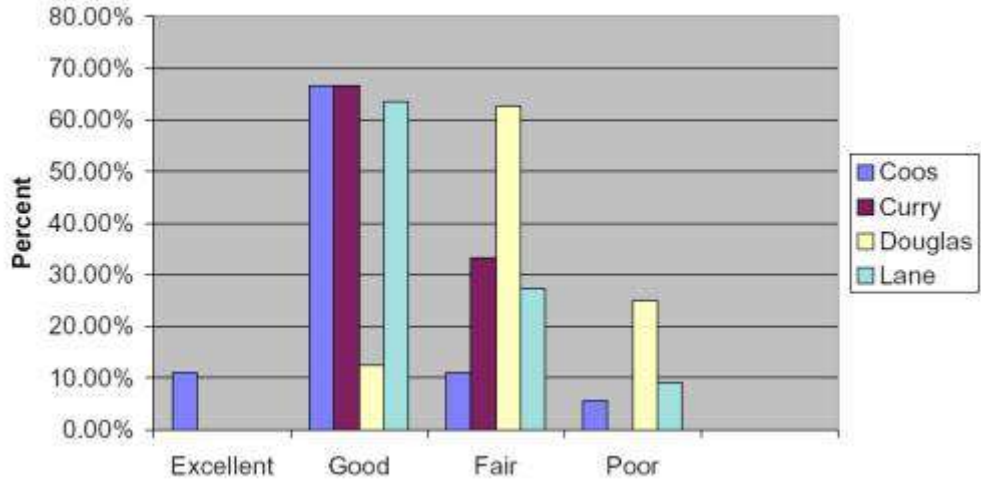


Figure 26 - Importance of Internet Access - Critical Users

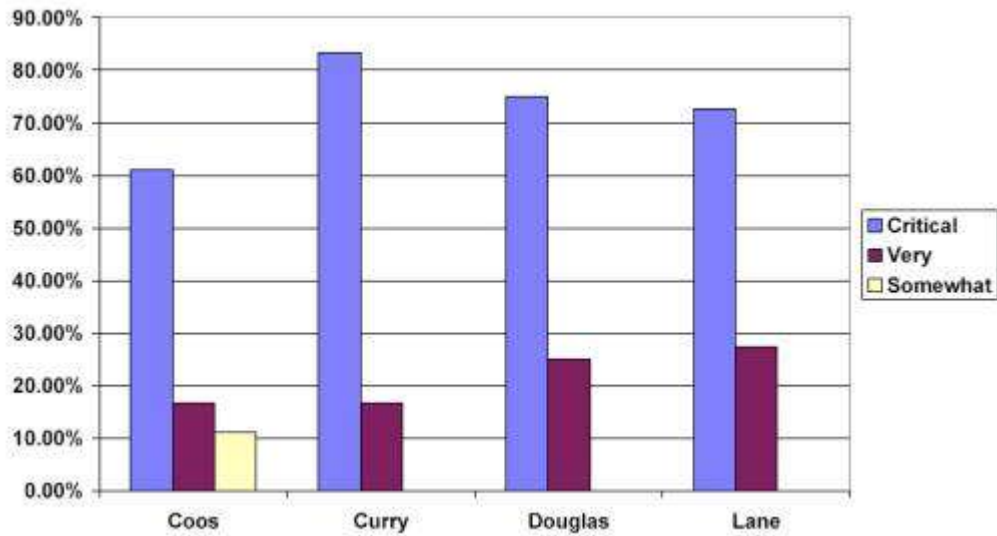


Figure 27 - Importance of Internet Access - Community Users

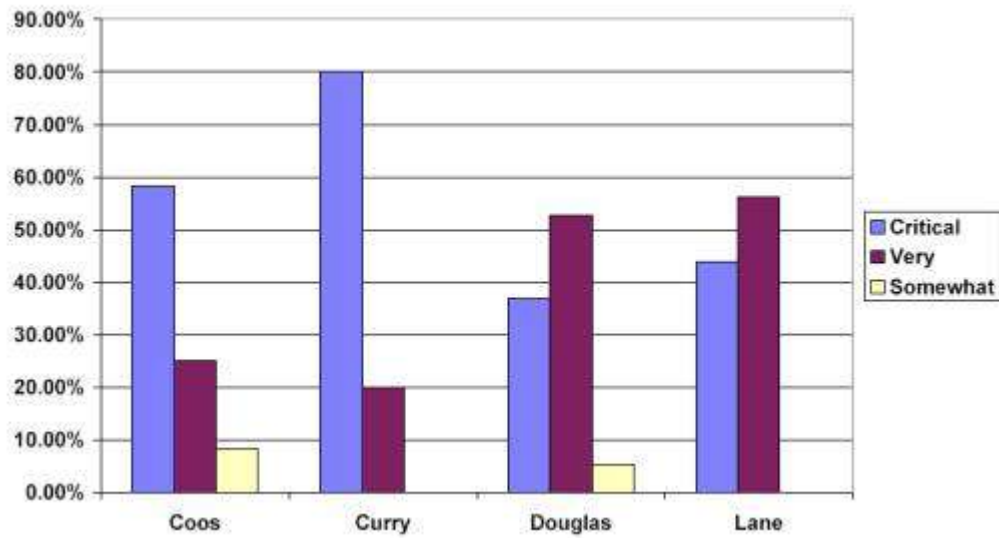


Figure 28 - Internet Connection Speed - Critical Users

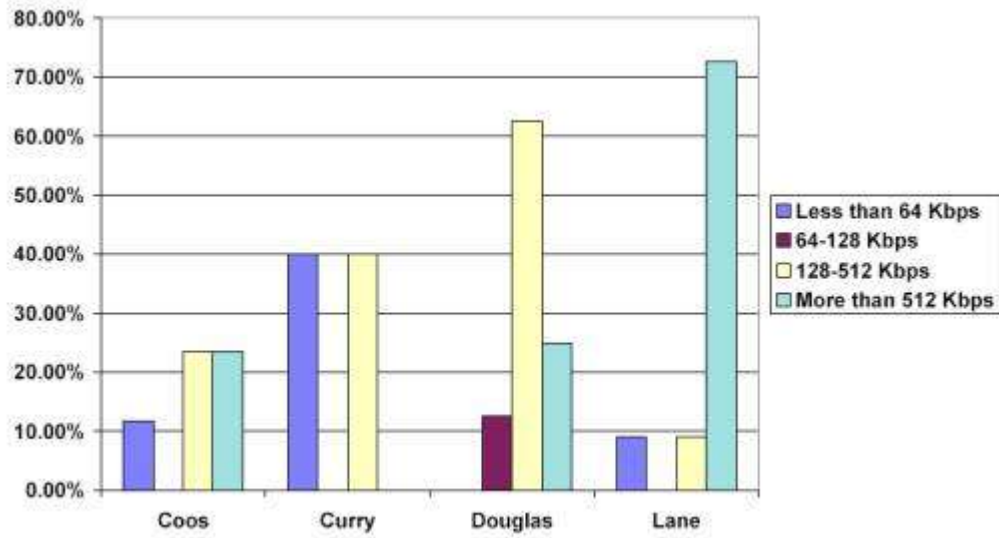


Figure 29 - Internet Connection Speed - Community Users

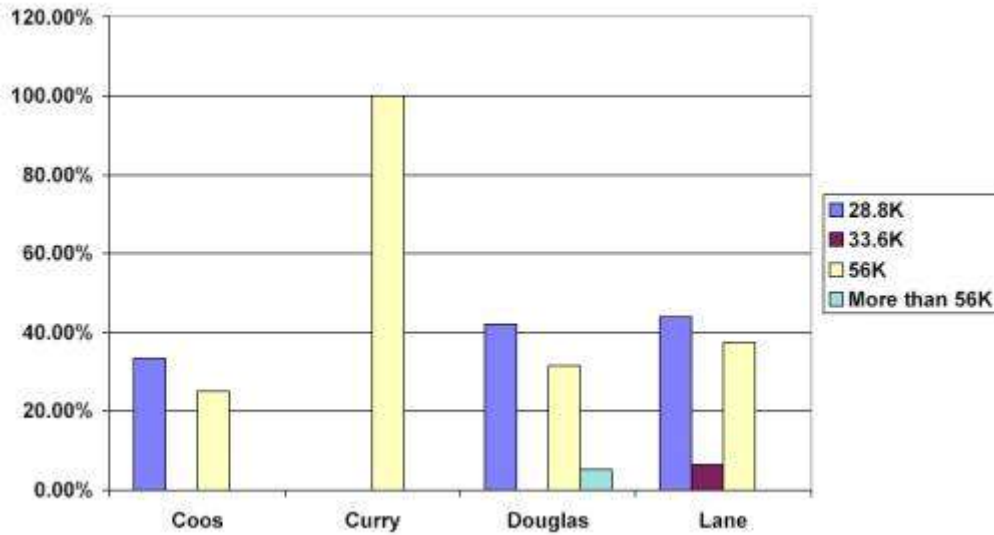


Figure 30 - Type of Internet Connection - Critical Users

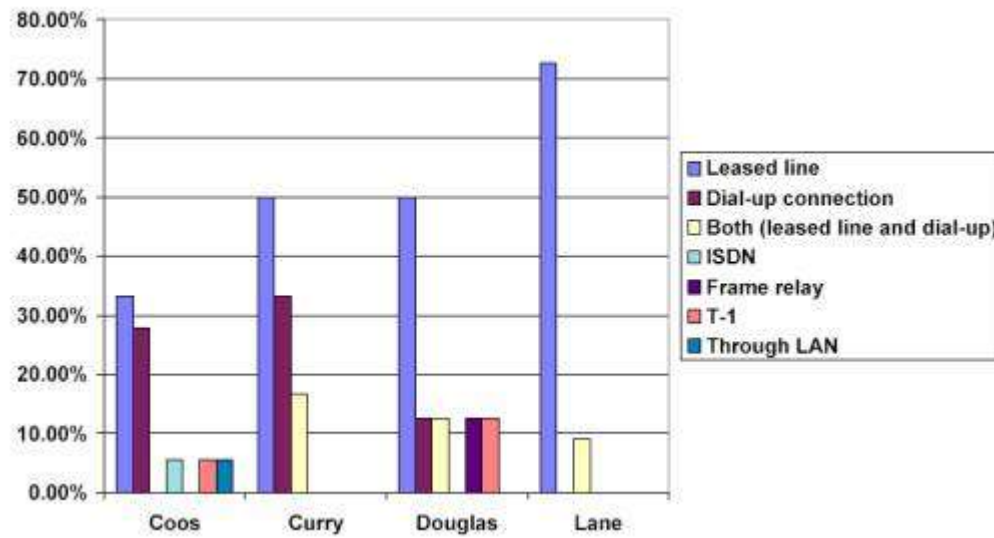


Figure 31 - Internet Connection by Type of Connection - Critical Users

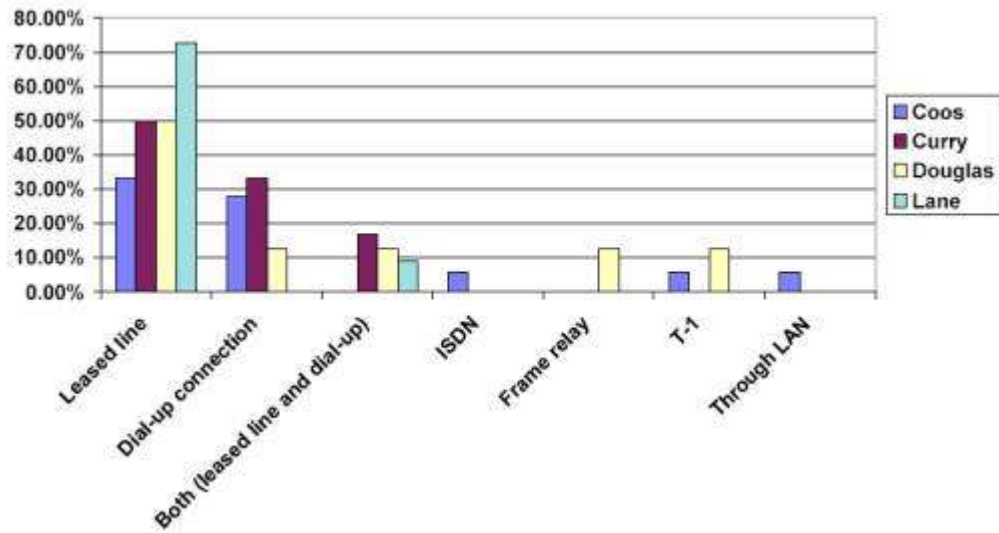


Figure 32 - Type of Internet Connection - Community Users

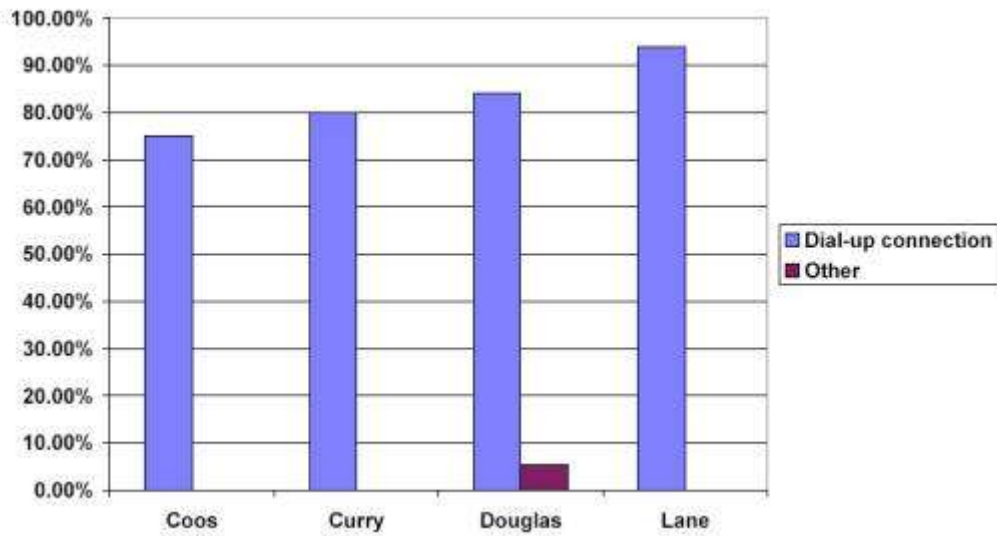


Figure 33 - Satisfaction with Telecommunications Providers - Douglas County Community Users

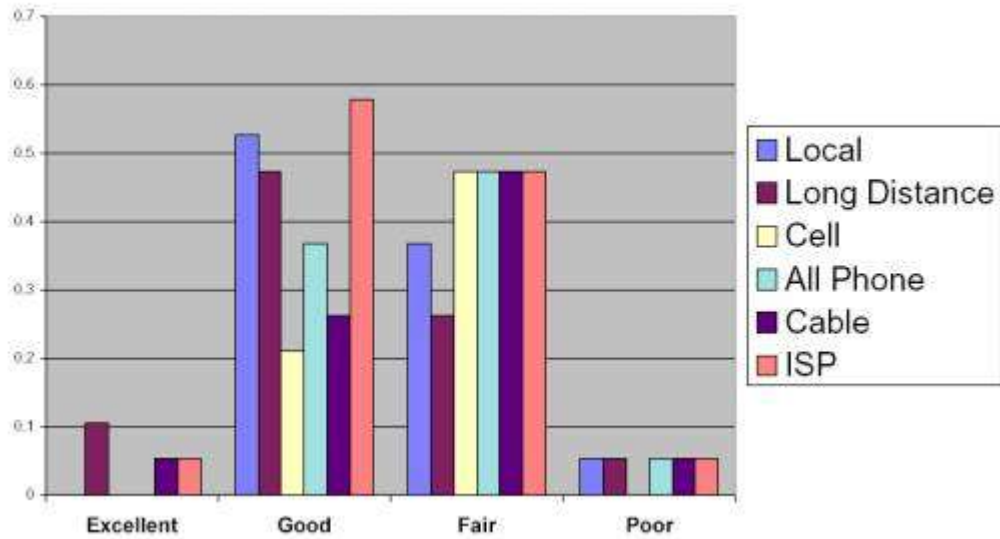


Figure 34 - Overall Telephone Service Ratings - Community Users

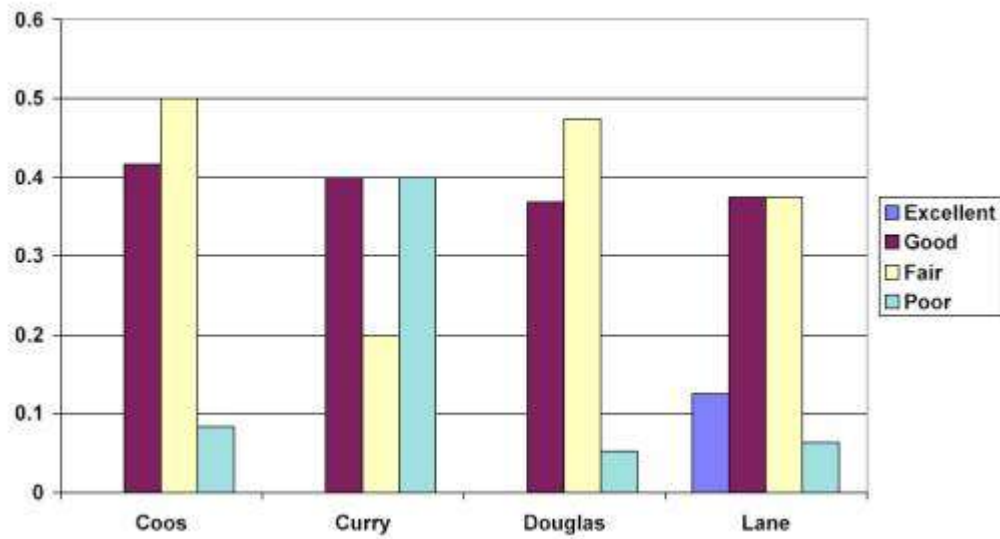


Figure 35 - ISP Ratings - Critical Users

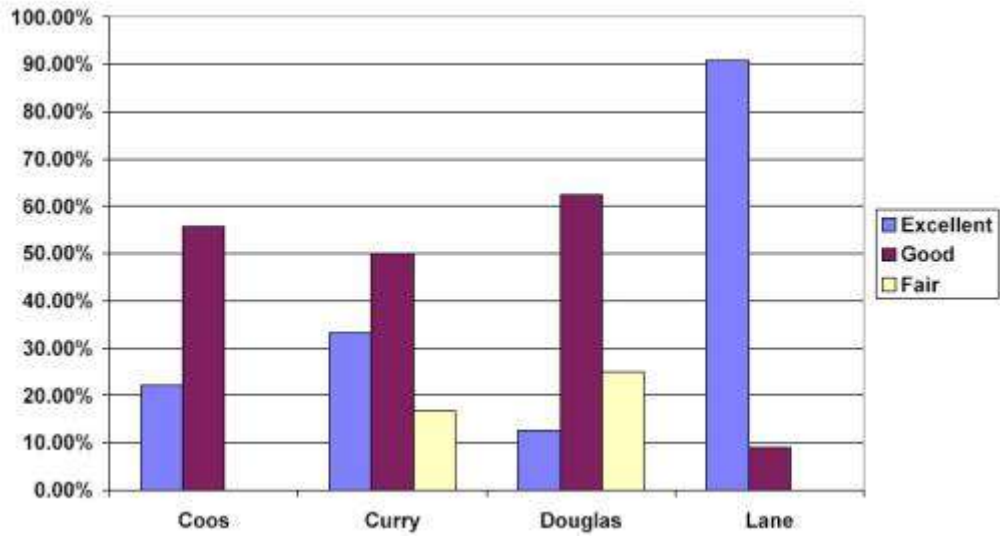


Figure 36 - ISP Ratings - Community Users

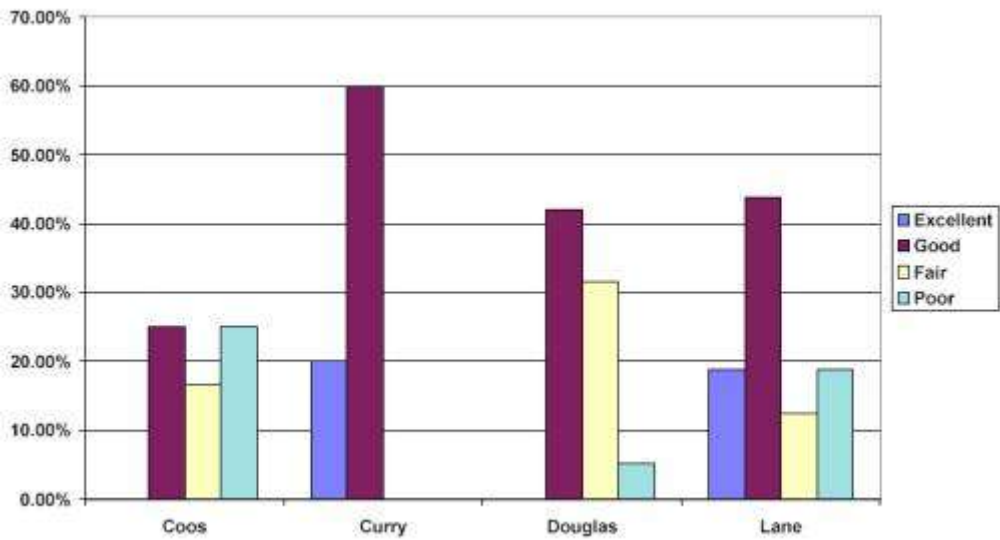


Figure 37 - Overall Telephone Service Ratings - Critical Users

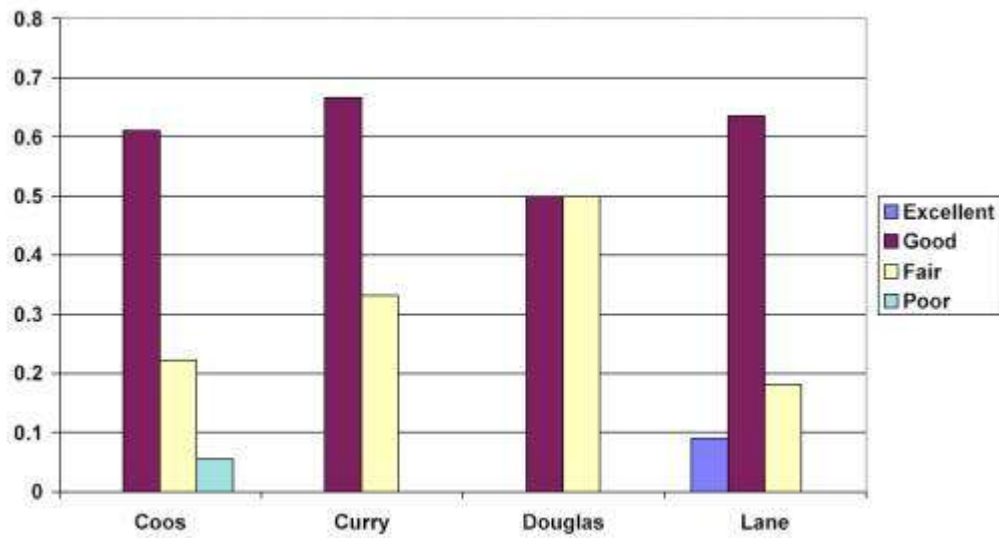


Figure 38 - Satisfaction with Telecommunications Services - Douglas County Community Users

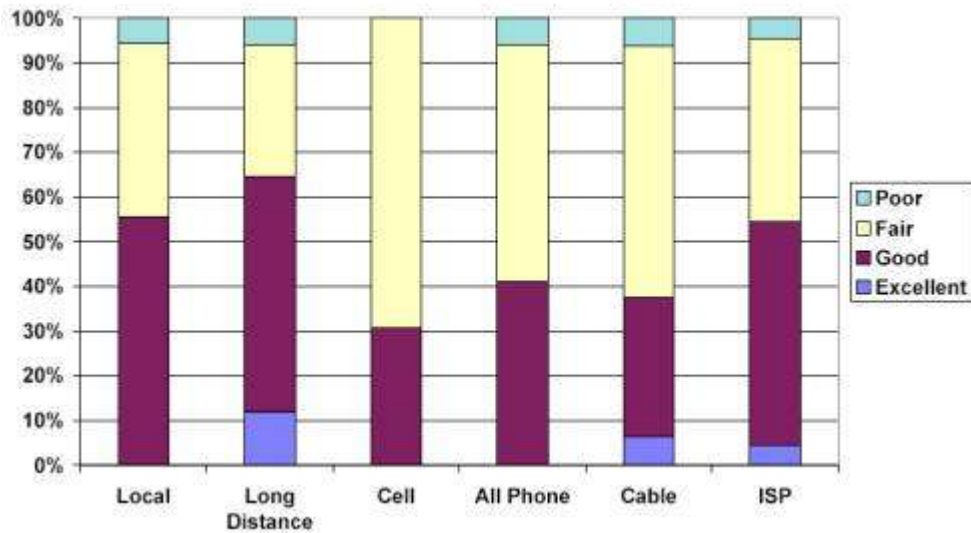


Figure 39 - Satisfaction with Telecommunications Services - Douglas County Community Users

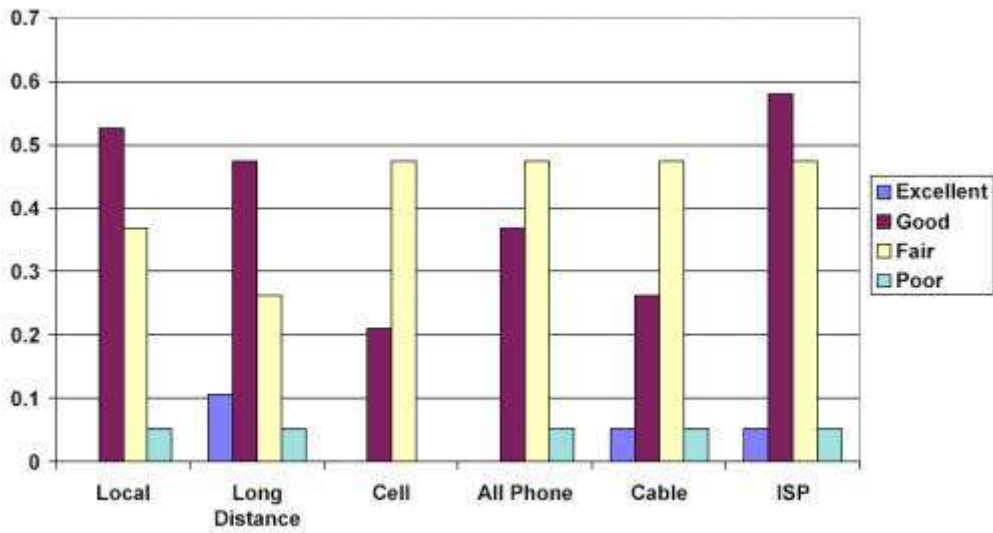


Figure 40 - Satisfaction with Telecommunications Services - Douglas County Critical Users

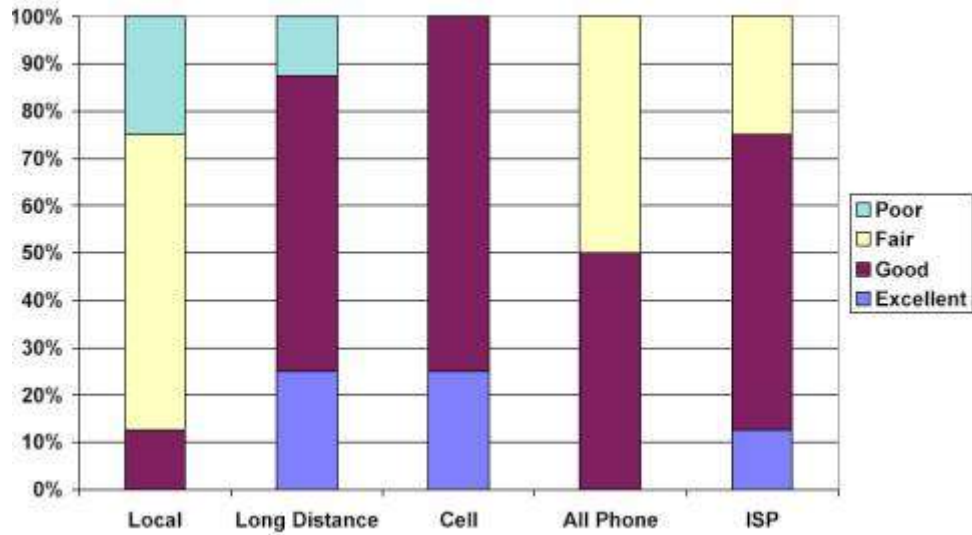


Figure 41 - Interest in Joining Regional Effort - Critical Users

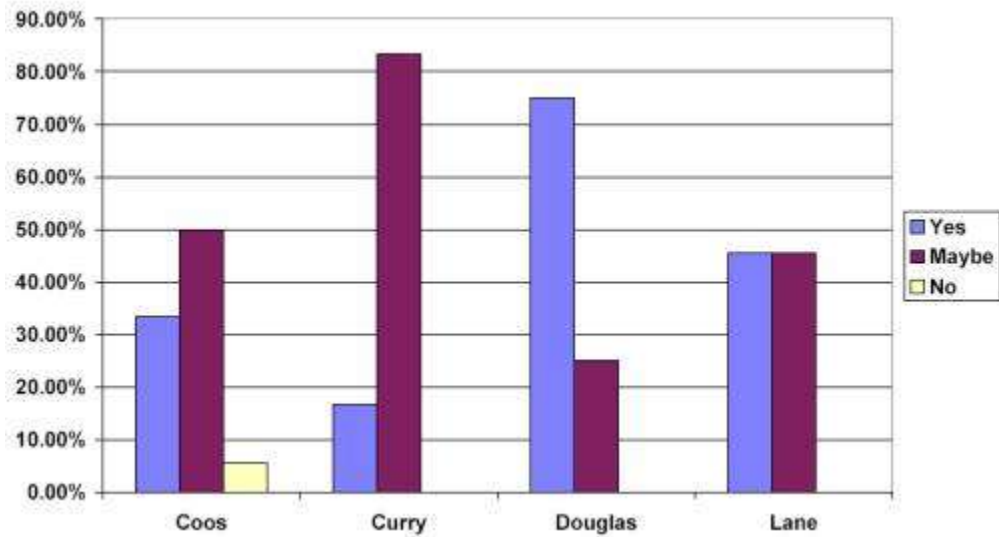


Figure 42 Anticipated Savings from Joining Regional Effort - Critical Users

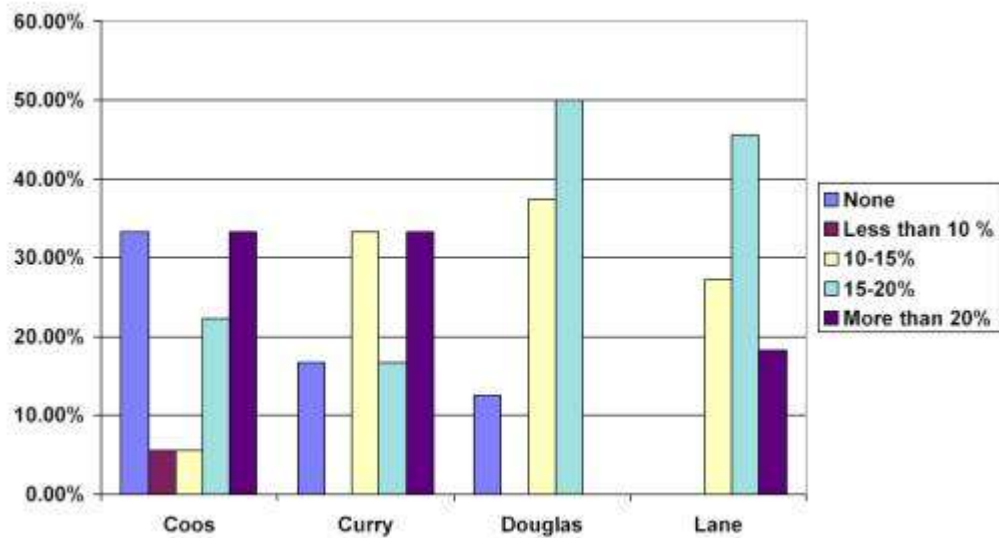


Figure 43 - Anticipated Savings from Joining Regional Effort - Community Survey

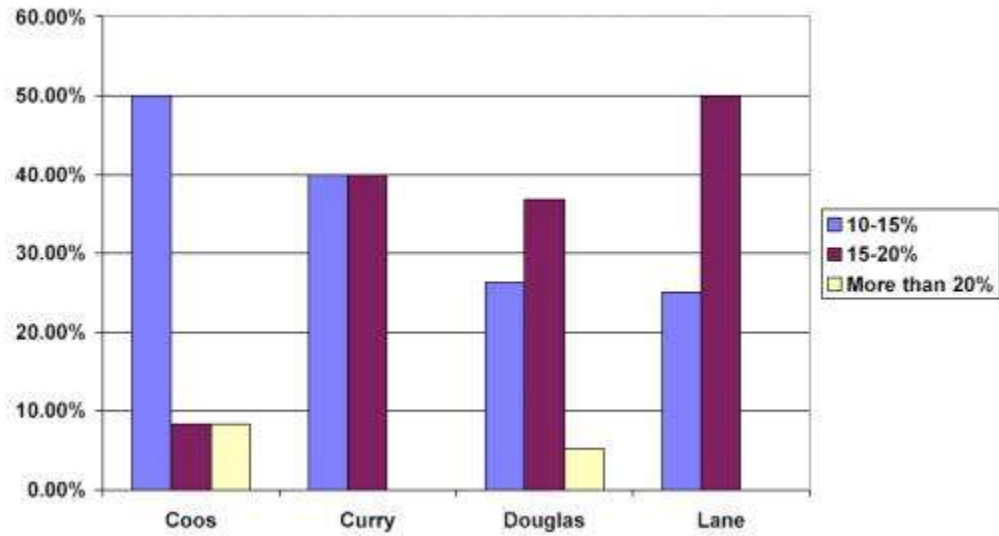


Figure 44 - Interest in Joining Regional Effort - Community Users

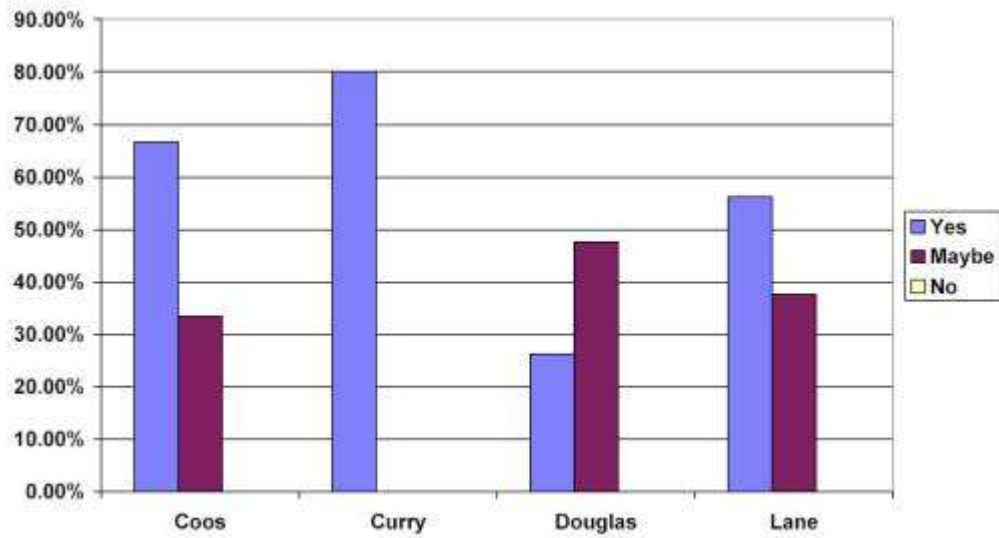


Figure 45 - Importance of Internet Access - Community Users

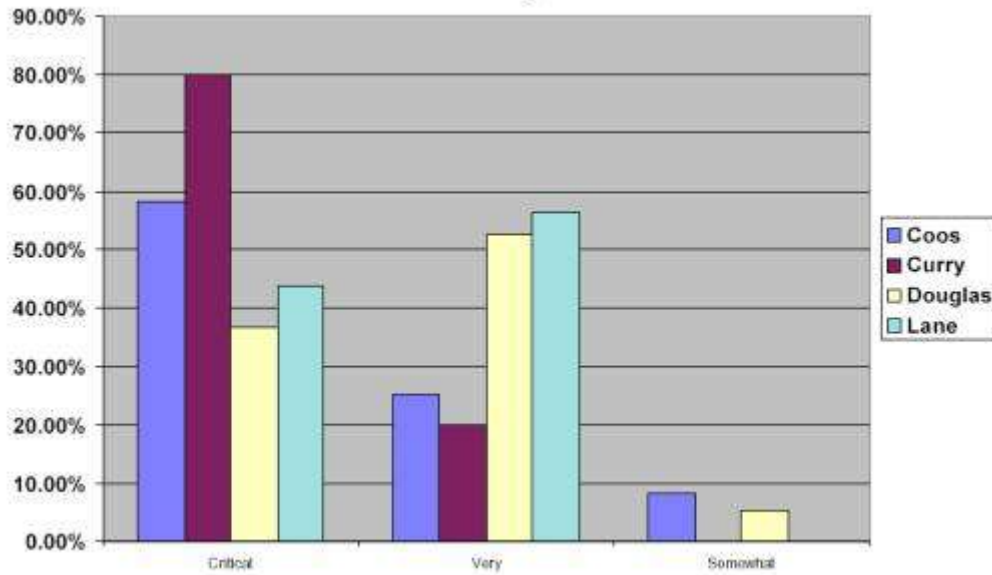
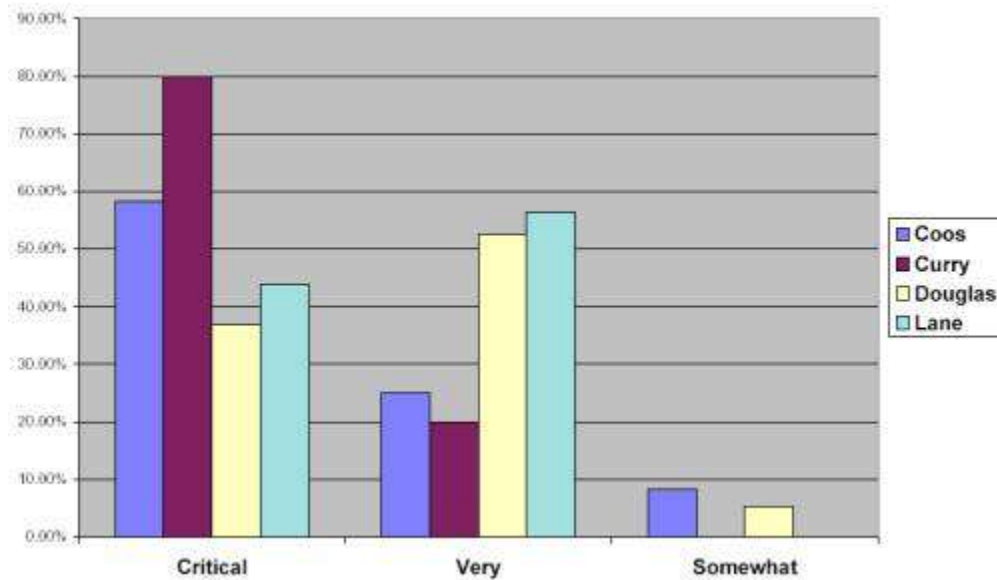


Figure 46 - Importance of Internet Access Community Users

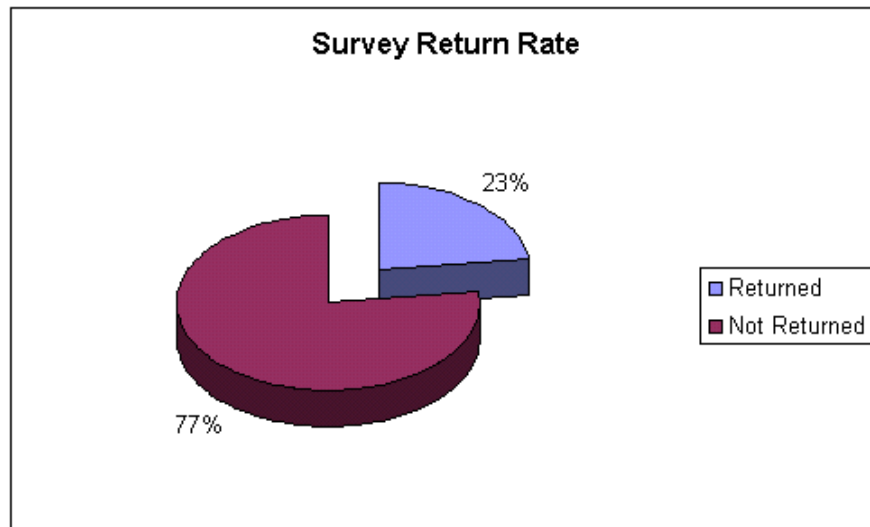


⁵ March 2000 Needs and Priorities Survey Results/Reports conducted as part of the groundwork for the SB 622 project preparation process.

ROSEBURG CHAMBER OF COMMERCE TELECOMMUNICATIONS SURVEY

Over the month of February 2002 the Roseburg Chamber of Commerce membership responded to a survey on various factors related to telecommunications. The results are best used to understand how small to mid-sized businesses of the area think about these factors. The response rate exceeded expectations and demonstrates the growing interest in telecommunications issues; reflecting growth in Internet access, importance of advanced services, ownership of personal computers and a number of other factors useful for planning purposes.

Figure 47 - Survey Return Rate



162 surveys returned out of 700 sent. Rounding of % may result in totals not equal to 100%.

Figure 48 - Business Locations

Average number of employees - 22

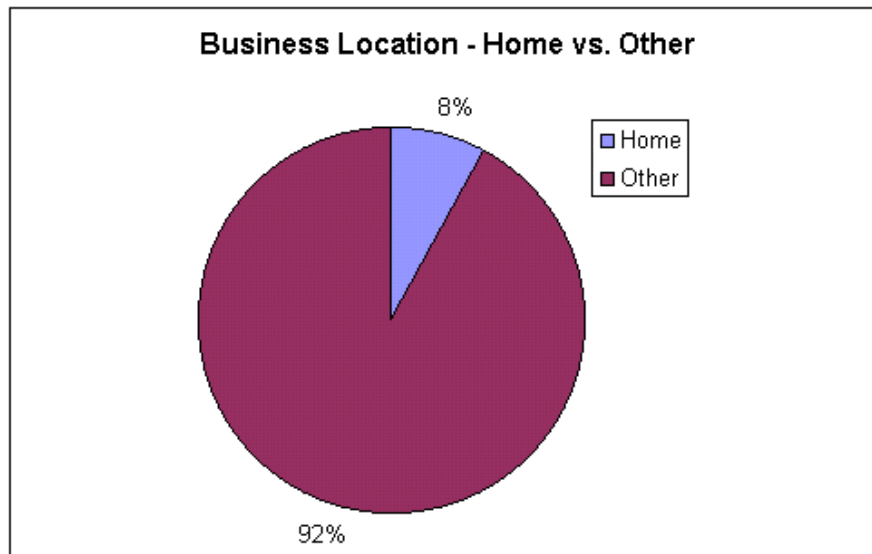


Figure 49 - Businesses In Cities

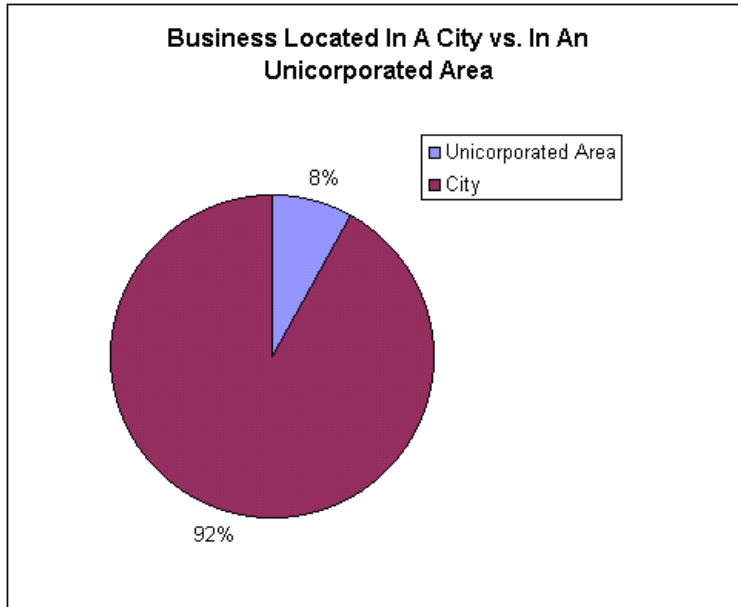
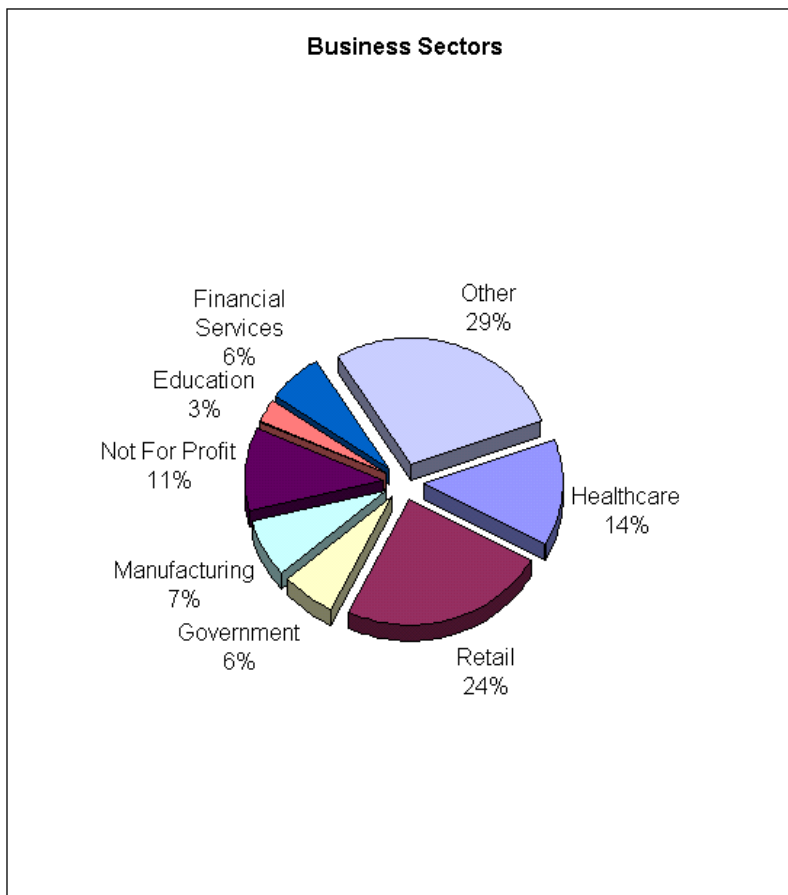


Figure 50 - Business Sectors Responding To Survey



Businesses in the "Other" category

- Artist
- Attorney
- Aviation
- Charity
- Communications
- Computer/Internet Usage
- Construction
- Contractor
- Electricity
- Employment Services
- Farming
- Food
- Forestry Consulting
- Golf Course
- Hospitality/Lodging
- Insurance
- Legal Services
- Office Space

Figure 51 - Computer Skills, Online Usage, and Work From Home

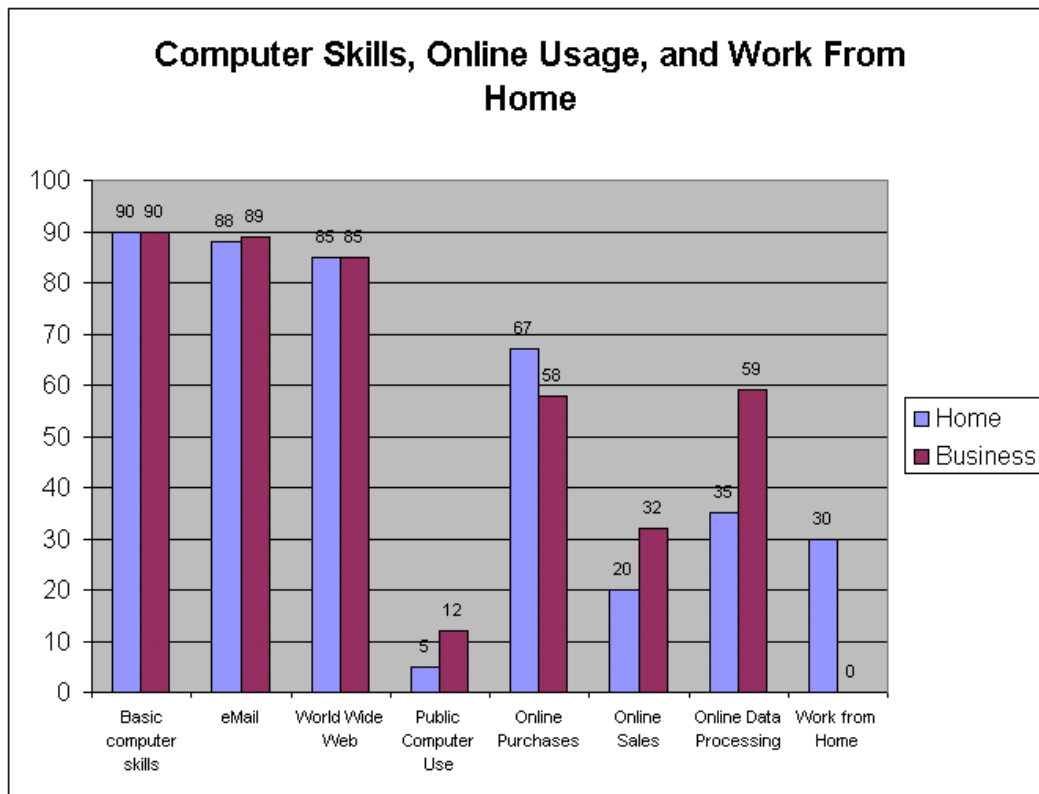
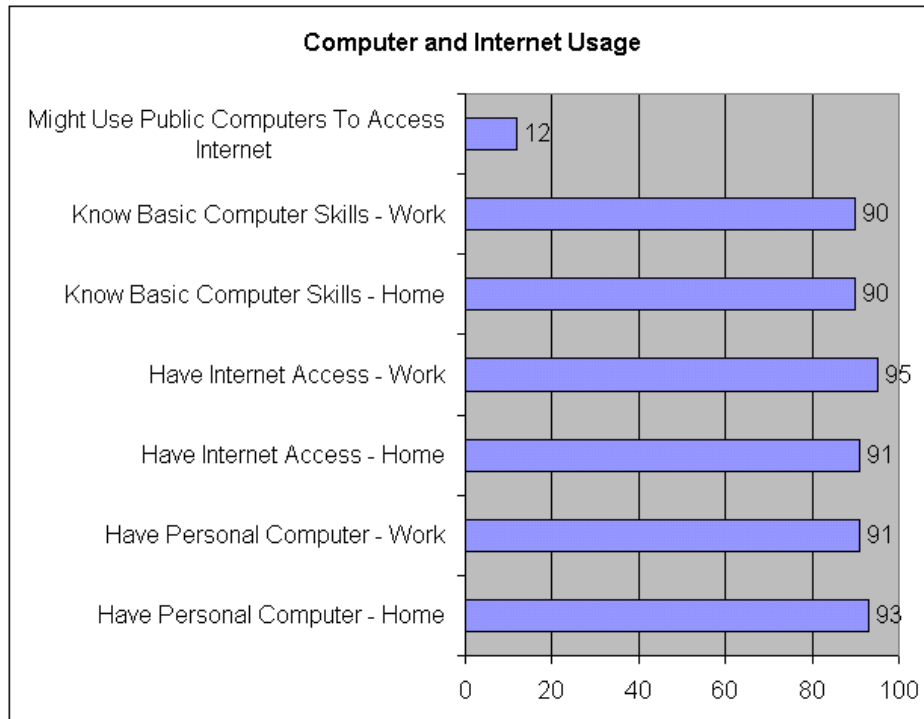


Figure 52 - Computer and Internet Use



Average Number of PC's at Home = 1.4
 Average Number of PC's at Work = 11.3

Figure 53 - Telecommunications Connections

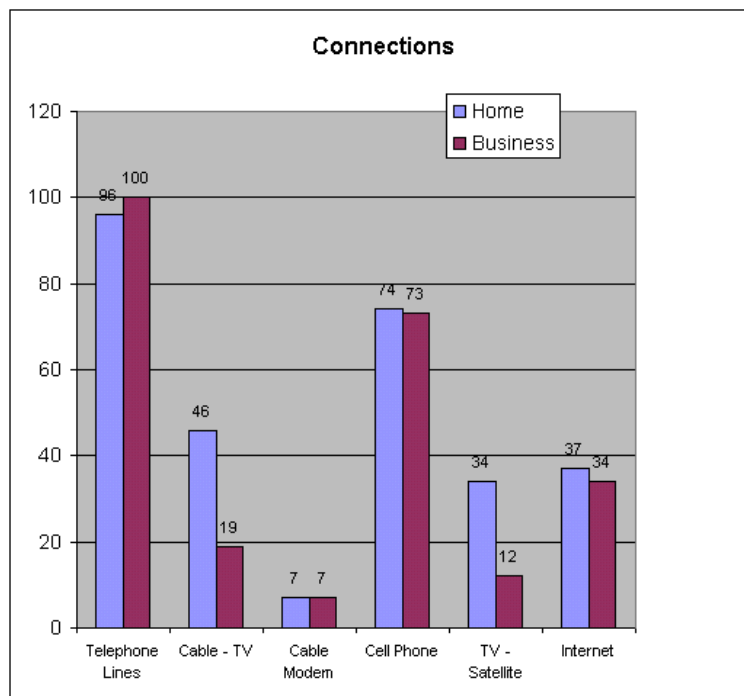
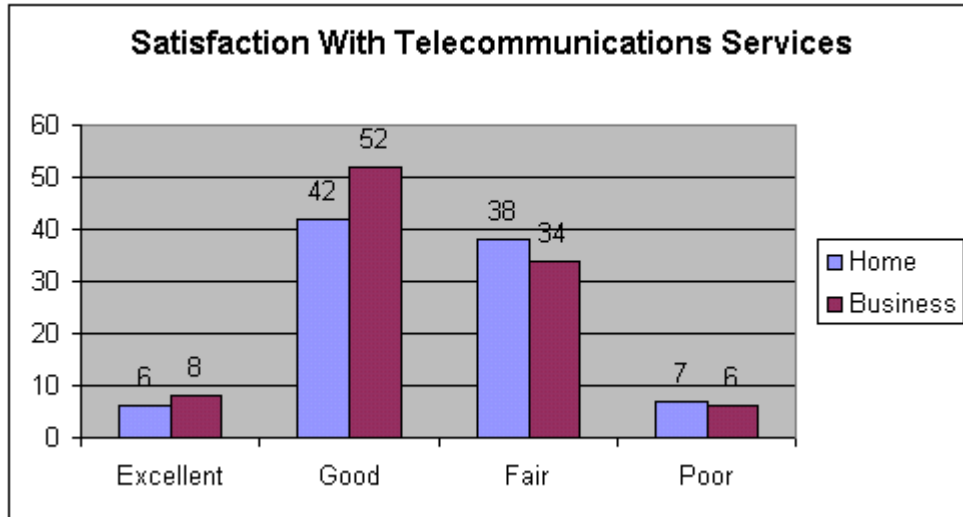


Figure 54 - Satisfaction With Telecommunications Services



Name of Telecommunications Providers

- ADNINTERN (GP)
- AOL
- ATG
- ATT
- Avaya
- BBG Marketing
- Cascade Utility
- Century Tel
- Charter
- Citizens
- Computer Connect
- Dataweb
- Direct TV
- Douglas County
- Earthlink
- Edge Wireless
- Fairpoint
- Fox Communications
- GE Exchange
- Hughes Network Services
- Internetcds
- McLeod USA
- MCSI
- Megabyte
- Pacific Communications
- Pegasus Satellite TV
- Pioneer Net
- Preferred Communications
- Qwest
- Ramcell
- Rio
- Rosenet
- Shared Communications
- Softech Suites

Southern Oregon Communications
 Southern Oregon Telecom
 Sprint
 Sprint PCS
 Starband
 Tymwyse
 US Cellular
 United Communications
 Valley Tel
 Verizon
 Wanweb
 Web Media Express
 Wizzards

Figure 55 - Modes of Internet Access

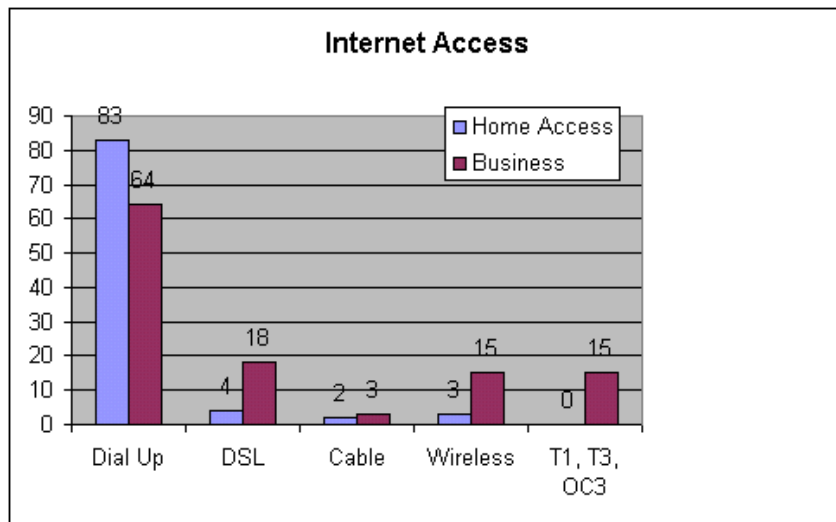


Figure 56 - Importance of Internet Access

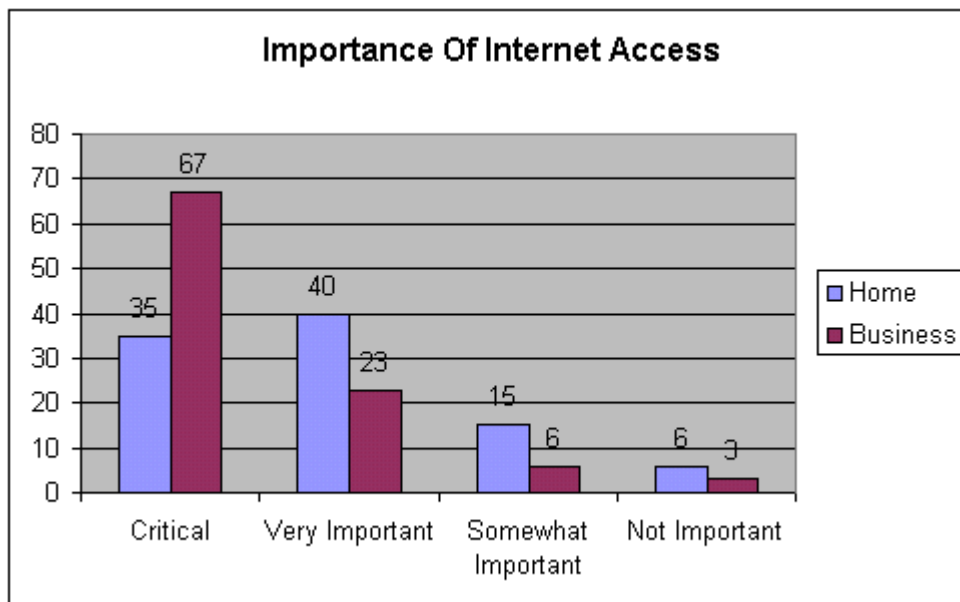


Figure 57 - Importance of Speed for Internet Access

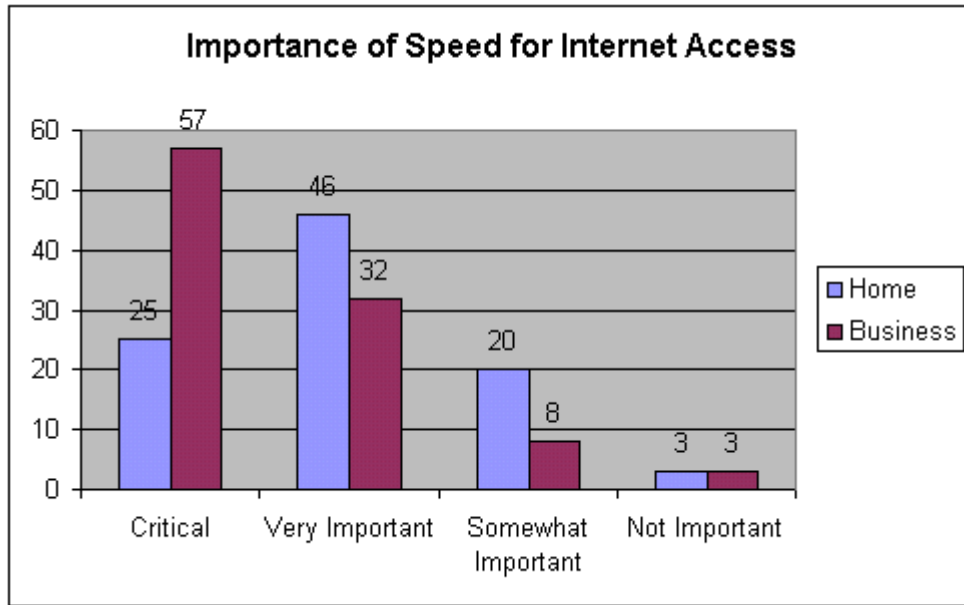


Figure 58 - Website Ownership

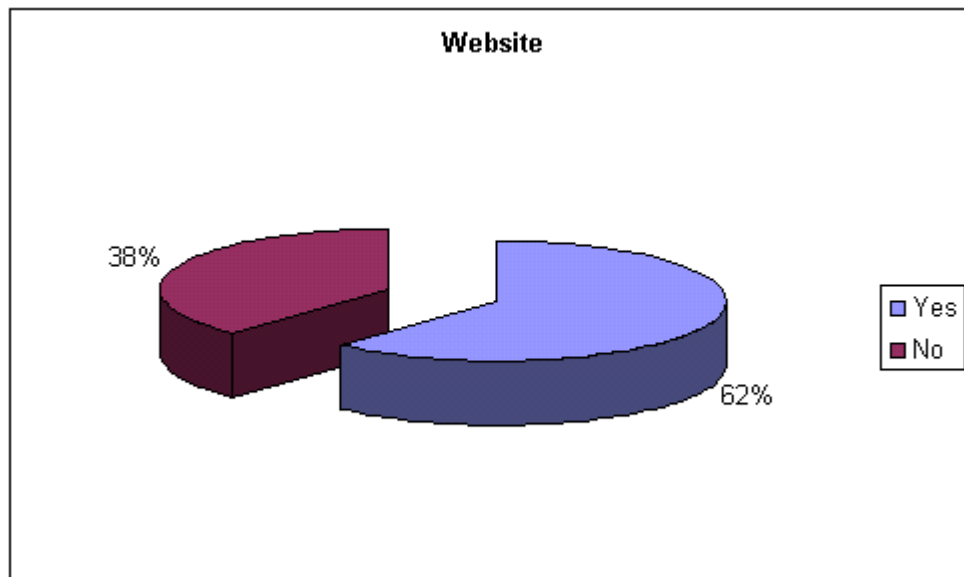


Figure 59 - Website Hosting Location

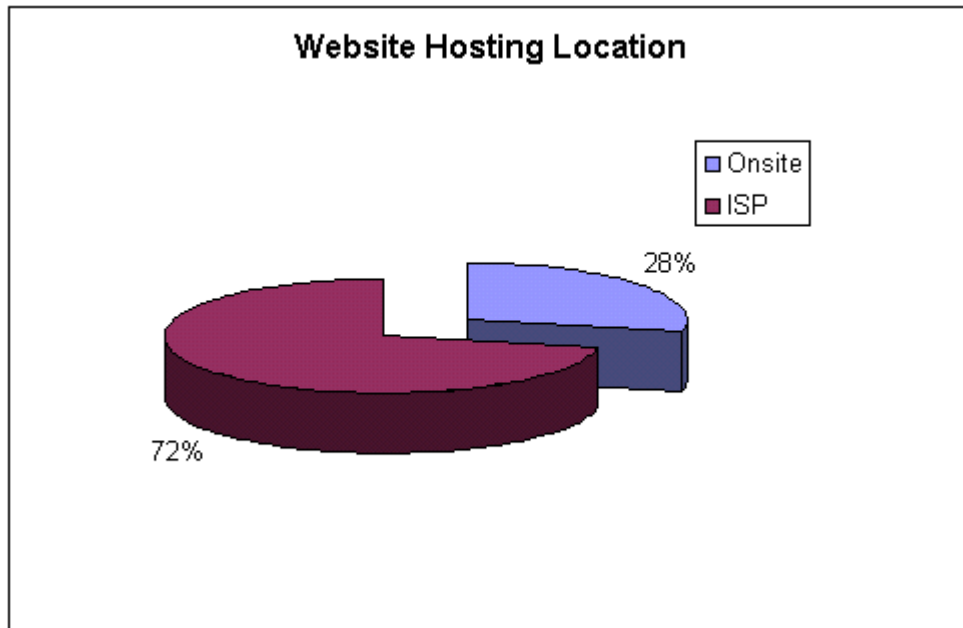
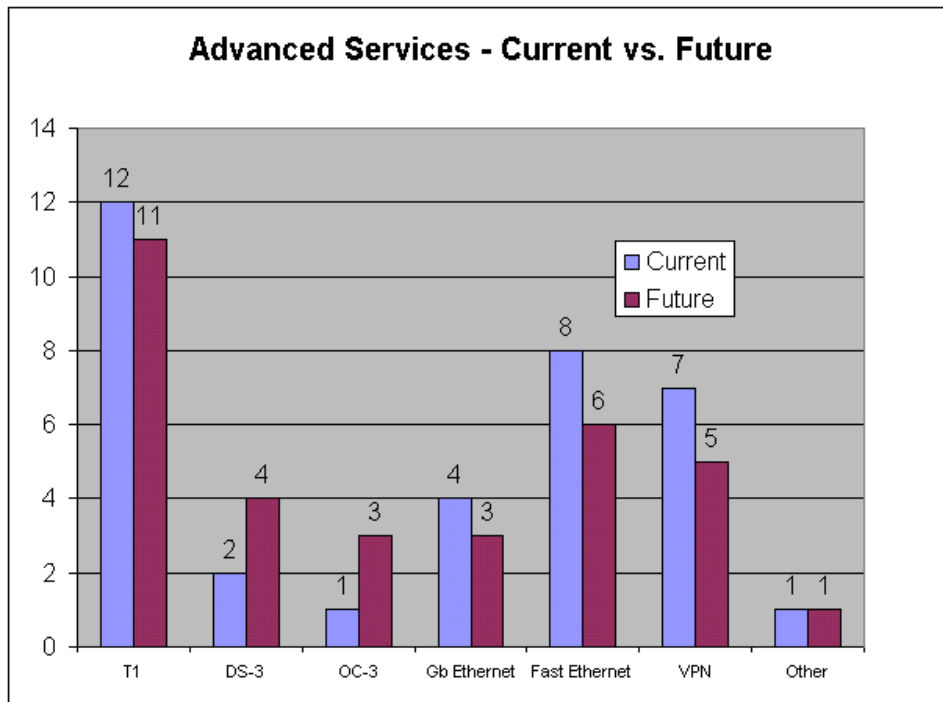


Figure 60 - Advanced Services - Current vs. Future



Note: Low response rate with questionable accuracy. Over 120 surveys left these questions blank with many indicating "?" for these items. The T-1 % does closely correspond to the responses given under "Modes of Internet Access" (Figure 55).

STAKEHOLDERS

Residents

Government

- Federal
- State
- County
- Cities
- Tribal

Telecommunications Industry

- Incumbent Local Exchange Carriers
- Cable Industry

Competitive Local Exchange Carriers

- Internet Service Providers

Health Care

- Hospitals
- Clinics
- Provider offices
- Imagery Facilities
- Other

Commerce

- Chamber of Commerce
- Businesses of all sizes

Education

- Universities & colleges
- Community Colleges
- k-12
- Trade schools

Libraries

Not for profit entities

SWOT ANALYSIS - STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS

SWOT Evaluations

	Goal 1	GOAL 2	GOAL 3	GOAL 4	GOAL 5
STRENGTHS					
Quality of life	X		X	X	X
Electric Co-operative	X		X	X	
Awareness/motivation to make positive changes	X		X	X	X
Motivated work force/intelligent work force, trainable work force, etc				X	X
Incentives like tax breaks, quality of life, cost of living			X	X	X
On I-5 corridor					
Railroad					
Political/community leadership	X		X	X	X
High-speed fiber access	X	X	X	X	X
Tier 1 Internet access	X	X	X	X	X
Postage stamp pricing	X	X	X	X	X
Direct fiber connect to Asia	X	X	X	X	X
Potential for out of county data storage		X	X	X	X
PC home and business ownership			X	X	X
Pent-up demand for high speed access	X	X	X	X	X
Number of ISP's	X	X	X	X	X
Good community college	X		X	X	X
Medical Center	x		X	X	X
Work from home-build on		X		X	X
WEAKNESSES					
Embracing change	X	X	X	X	X
Telecom infrastructure	X	X	X	X	X
Limited trained work force	X	X	X	X	X
"Hundred valleys of the Umpqua" - Terrain		X	X	X	X
Ability to attract services	X	X	X	X	X
Limited amount of industrial property	X	X	X	X	X
No telecom strategic plan	X	X	X	X	X
Too many backhoes	X	X			
High cost of build-out	X	X	X	X	X
Scarce funds (capital)			X	X	X
ROI by telco's uses urban model			X	X	X
Unbundled network elements			X	X	X
Telco perception of rural opportunities	X		X	X	X
Insular thinking	X	X	X	X	X
Need to think beyond County		X	X	X	X
Community healthcare network	X	X	X	X	X
Not for profit technical capacity	X	X	X	X	X
No commercial airport					
Political attacks on BPA concept	X		X	X	X
Understanding of how to use advanced Internet services	X		X	X	X
Public transportation		X	X	X	X
Upscale shopping		X	X	X	X
Young people leave	X	X	X	X	X
Retention/recruitment of rural healthcare providers	X	X	X	X	X
Seniors using email in rural areas	X	X	X	X	
Lack of reasonably priced high-speed services	X	X	X	X	X
OPPORTUNITIES					

Preserves high quality of life	X	X	X	X	X
Better level of services, or better	X	X	X	X	X
Move to high tech usage	X	X	X	X	X
Rebound in economy	X	X	X	X	X
Advances in medicine/Tele-Health	X	X	X	X	X
Government	X	X	X	X	X
Financing		X	X	X	X
Global market access – To & From	X	X	X	X	X
Educational opportunities	X	X	X	X	X
Digital libraries	X	X	X	X	X
Cultural activities	X	X	X	X	X
Entertainment	X	X	X	X	X
Testing	X	X	X	X	X
Job market	X	X	X	X	X
Politics	X	X	X	X	X
Tourism	X	X	X	X	X
Constantly evolving technology	X	X	X	X	X
Homeland security	X	X	X	X	X
Telco's	X	X	X	X	X
Telecommute	X	X	X	X	X
Cost of fiber/equipment		X	X	X	X
More than 1 backhaul provider		X	X	X	X
Offsite data storage	X	X	X	X	X
<u>THREATS</u>					
Financing		X	X	X	X
Media-bad press	X	X	X	X	X
Politics	X	X	X	X	X
Government	X	X	X	X	X
Unwilling to embrace change	X	X	X	X	X
Constantly changing technology	X	X	X	X	X
Lack of information	X	X	X	X	X
Existing, entrenched, telcos	X	X	X	X	X
"Homeland security"	X	X	X	X	X
Franchise fees	X		X	X	X
On I-5 corridor (Security)					

APPENDICES



**APPENDIX 1 - ROSEBURG AREA CHAMBER OF COMMERCE TELECOMMUNICATIONS
SUBCOMMITTEE**

NAME	REPRESENTING	DTCSPC
Helga Conrad	Economic Development	**
Gary Crowe	FCC Furniture	
John Dunn	Chamber	
Rex Eads	Government/URCOG	
Jim Evans	Private Sector/Wood Products	**
Peter Felten	Government/City of Roseburg	
Doug Hunter	Government/County	Chair **
Dennis Hurowitz	Orengo	
John Irwin	Facilitator	**
Ron Lovern	Co-operatives/Douglas Electric Co-op & NoaNet Oregon/Alternate	(**)
Jim McClellan	Citizen/Community Participation	**
Kevin Potter	Government/County/Alternate	(**)
Nancy Radcliffe	Health & Medical	**
Dotty Randall	Private Sector/Call Centers	**
George Roth	Education	**
Dave Sabala	Co-operatives/Douglas Electric Co-op & NoaNet Oregon	**
Jim Stelsen	Mercy	
Paul Sykes	Government/City of Roseburg & ISP's	**
Pete Wild	Financial	**
Randy Wetmore	Government/City of Roseburg	

** = Core planning group

APPENDIX 2 - SCOPE OF SERVICES

Working with selected members of the Roseburg Chamber of Commerce, Telecommunications Subcommittee John Irwin will facilitate and participate in a strategic-planning process for telecommunications for Douglas County, comprised of three parts:

A needs assessment,

Goal setting to address the most critical issues, and

The crafting of an appropriate action plan.

Needs Assessment

Action item(s):

- Facilitate identification of stakeholders.
- Facilitate an agreed to process for gathering and analyzing of information about the local telecommunications environment from both a demand and supply perspective.

Outcome(s):

Documentation reflecting:

- Identification of stakeholders;
- Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis;
- Existing telecommunications services providers;
- Business, public agency and household use of (and satisfaction with) existing infrastructure and services;
- Potential demand for expanded infrastructure and service; and
- Financial resources and potential partnerships for implementing strategies to address telecommunications needs.

Expected duration:

1 to 2 months

Comment(s):

The information-gathering process will be at a level sufficient to identify general trends, make reasonable projections, and evaluate the feasibility of alternatives.

Goal Identification and Setting

Action item(s):

- Facilitate the identification and setting of priority goals to be derived from the findings of the needs assessment.

Outcome(s):

- Documented priority goals.

Expected duration:

1 month

Comment(s):

The goals will be based on broad input from the Telecommunications Subcommittee and reflect the community's consensus about needed action. These goals will drive the development of the action plan. Concrete goals show that the community is focused on its priorities, that there is a coordinated effort to work towards a common end, and that progress will be measurable.

Action Plan

Action item(s):

- Facilitate the crafting of an effective plan that identifies specific strategies, funding resources, organizational issues, staffing needs and a general timeframe for implementation.

Outcome(s):

- Documented action plan.

Expected duration:

2 to 3 months

Comment(s):

The action plan will contain strategies that complement one another and offer a realistic framework for accomplishing top-priority goals. In combination with the assessment and goal setting it will provide:

- Infrastructure issues and problems that limit economic development, service delivery, or quality of life;
- Provide an agreed to set of priorities for people to use as guidelines for the problems most important to address first;
- Create opportunities for partnerships by identifying common interests;
- Build more broad-based support for new telecommunications applications; and
- Provide a mechanism to coordinate multiple strategies.

Methodology and Results
By Toshihiko Murata, Project Director, and
Patricia A. Gwartney, Founding Director



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Eugene, OR 97403-5245
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Facsimile: 541-346-5026
Email: osrl@oregon.uoregon.edu
WWW: <http://darkwing.uoregon.edu/~osrl>

I. Introduction

As one part of a continuing effort to better serve the needs of Oregon residents, the Oregon Economic and Community Development Department (OECD) contracted with the Oregon Survey Research Laboratory (OSRL) to conduct a representative survey of households on a variety of telecommunications issues. OSRL conducted a random-digit-dial (RDD) telephone survey of 1,696 households January - February 1999. This report summarizes the survey methodology and results.

II. Survey Methodology

This section describes the development of the survey instrument, the survey sampling strategy, and data collection efforts.

Survey Instrument

The survey's goal was to obtain statistically valid and reliable information from Oregon households about telecommunications-related behaviors, plans, needs, knowledge, and attitudes. OSRL developed survey questions in close consultation with OECD representatives. Many questions replicate those in the Central Oregon Household Telecommunications Survey, conducted by OSRL Fall 1999 for the Central Oregon Telecommunications Task Force. Other questions OSRL developed, tested, and implemented specially for this project.

The telephone survey instrument addressed the following topics:

1. Household computer ownership and the "Oregon Benchmarks" question on computer skills;
2. Internet and World Wide Web (WWW) access at home, monthly cost of home Internet service, household members who use the Internet connection, and modem speed and type;
3. Largest amount willing to pay for better Internet and WWW service (unbundled), in addition to current bill, for:
 - a. fewer busy signals,

- b. faster transmission speed,
 - c. ability to always be connected, and
 - d. video capability;
4. Internet and WWW access through employer or volunteer work, and frequency of such use;
 5. Anticipated frequency of Internet and WWW access in public places in 3-5 years for employment-related purposes and informational purposes;
 6. Current frequency of WWW use for buying things;
 7. WWW use already, desire to use, or disinterest in using, for the following purposes:
 - a. shopping for necessities, such as groceries and medicines,
 - b. shopping for other things, such as clothes, cars, or trucks,
 - c. conducting government business, such as filing taxes or registering motor vehicles,
 - d. making reservations or buying tickets,
 - e. checking financial information, such as on-line banking or the stock market,
 - f. learning things, such as taking college classes for credit, registering for classes, learning new job skills, or on-the-job training,
 - g. entertainment, such as watching TV or movies, listening to music, or downloading music,
 - h. taking part in state and local government, such as giving testimony, or watching debates and votes (using real-time video), and
 - i. talking with medical specialists over long distances (using real-time video);
 8. Household television ownership, cable service, and wireless cable;
 9. Household telephones, including:
 - a. service quality,
 - b. number of telephone lines,
 - c. plans to add an additional line,
 - d. largest amount willing to pay for a second home telephone line,
 - e. cell telephones,
 - f. computer-dedicated lines,
 - g. home business-dedicated lines,
 - h. presence of telephone services (call waiting, caller ID, or voice mail),
 - i. largest amount willing to pay for telephone services (call waiting, caller ID, or voice mail),
 - j. ability to send faxes,
 - k. monthly costs for long-distance, and
 - l. monthly costs for local telephone services;
 10. Knowledge questions concerning:
 - a. the ability to place long distance telephone calls via the Internet, and
 - b. awareness of digital subscriber lines (DSL);
 11. Demographic and background questions, including age, sex, race/ethnicity, education, employment, home business, presence of children in home, household income, and county.

Completed interviews averaged 21 minutes. Respondents were completely anonymous (i.e., no one can be identified in any way). OSRL obtained human subject approval for the survey from the University of Oregon Committee for the Protection of Human Subjects.

Sampling

Accurate sampling was one key part of OSRL's strategy to achieve the goal of statistically valid and reliable information from Oregon households about telecommunications. Another study goal was to better understand rural regional telecommunications needs. To achieve these goals, OSRL implemented a regional over-sampling strategy, concentrating on rural areas.

OECD provided OSRL with information identifying 11 county-defined regions, which closely match the agency's usual regional divisions. All Oregon urban areas were placed into a single "region." Rural areas were divided into 10 regions, defined in the list below:

Region 1 Urban areas, including all Multnomah County, urban areas of Washington and Clackamas Counties, and larger cities (Albany, Ashland, Bend, Eugene, Springfield, and Salem).

Region 2 Clatsop, Columbia, and Tillamook Counties, plus rural areas of Washington County.

Region 3 Benton, Lane, Lincoln, and Linn Counties.

Region 4 Coos, Curry, and Douglas Counties.

Region 5 Jackson and Josephine Counties.

Region 6 Baker, Morrow, Umatilla, Union, and Wallowa Counties.

Region 7 Grant, Harney, and Malheur Counties.

Region 8 Hood River, Gilliam, Sherman, Wasco, and Wheeler Counties.

Region 9 Klamath and Lake Counties.

Region 10 Crook, Deschutes, and Jefferson Counties.

Region 11 Marion, Polk, and Yamhill Counties, plus rural areas of Clackamas County.

OSRL's goal was to obtain 150 interviews in each region. OSRL employs the Genesys Sampling System, the same used by the U.S. Census Bureau for its large-scale random-digit-dial (RDD) surveys. The Genesys procedure employs an RDD algorithm that is used in conjunction with our computer-aided telephone interviewing system (CATI). Within each region, OSRL obtained lists of all postal zip codes. Based on the zip codes, OSRL generated RDD samples of telephone numbers for each region.

This system is valuable both because it avoids biases encountered in telephone books and similar lists, and because new and unlisted telephone numbers have equal chances of selection as established numbers. This pre-programmed sampling process is accomplished without interviewer intervention. Telephone numbers appear automatically on interviewers' computer screens and are dialed by a keystroke (preventing dialing errors).

The first survey question asked respondents their county of residence, to ensure each sample unit was in its pre-defined region. A few respondents, however, did not know their county (1.3%). For such cases, we assigned them to the county that our sampling methodology said they resided in. The completed sample sizes for Regions 1, 2, 3, 4, 5, 7, 8, 9, and 10 were between n=150 and n=154. Region 5 had n=148, Region 6 had n=160, and Region 11 had n=175.

Altogether, 6,770 telephone numbers were randomly generated within regions. Of those, 3,859 (57%) were disconnected, non-working, nonresidential, fax/modem lines, or otherwise ineligible for the study. For 827 telephone numbers (12%), the status could not be determined (e.g., the numbers were continuously busy or no one ever answered, as occurs with telephone booths). From the remaining 2,084 telephone numbers, 1,700 interviews were completed and 2 were partially completed. After data collection, 6 cases were removed from the final data set because too many data were missing in the survey questions. In a few instances, adults who answered the survey did not know the answers to

technical telecommunications and computer questions, and they voluntarily handed the telephone over to another household member to answer a few questions.

The net CASRO response rate was 71.7% and the refusal rate was 11.3%. Response rates varied by region, from a high of 80.6% in Region 6 (Baker, Morrow, Umatilla, Union, and Wallowa Counties) to a low of 65.5% in the combined urban areas (Region 1). Refusal rates also varied by region, from a high of 16.0% in Region 9 (Klamath and Lake Counties) to a low of 8.8% in Region 11 (Clackamas, Marion, Polk, and Yamhill Counties). A complete sample, call disposition, and response rate report for each region and the entire study is provided in another section of this final report.

For completed sample sizes of about 150 in each region, sampling error is moderate. Sampling errors are calculated to help users of survey data assess how much confidence to place in a particular result in order to generalize from sample estimates back to the population. Sampling error is determined in part by sample size: the larger a sample is, the lower the sampling error. Sampling error is also determined by how much variability is in a particular statistic; thus, a variable split 50-50 has higher estimated sampling error than one split 95-5.

For a sample $n=150$ from a region with population $N=1,000,000$, at the 95% confidence level, a variable with a 50-50 proportional split has a confidence interval of .08. This means readers can be 95% sure that the true population figure is between 42% and 58% (i.e., $50\% \pm 8$). On a 90-10 split, the confidence interval is .05, which means readers can be 95% sure that the true population figure is between 85% and 95% (i.e., $95\% \pm 5$).

Data Collection

Interviewer training was conducted January 10, 2000. Interviewing was conducted from 9:00 a.m. to 9:00 p.m. all days of the week (except Sunday mornings) between January 11th and February 25th until the regional target sample sizes of completed interviews were achieved. Only well-experienced interviewers participated in this survey. Summary interviewer instructions are provided elsewhere in this final report.

The survey was conducted using OSRL's computer-aided telephone interviewing system (CATI). In CATI, sampling, interviewing and data entry is accomplished interactively. The programmed survey instrument contains all survey questions, interviewer probes for consistency, and pre-coded answer categories. Skip logic is programmed into CATI, preventing inappropriate questions from being asked.

In administering the survey, trained interviewers use telephone headsets in sound-reduced carrels at computer workstations connected by an NT network. Randomly distributed telephone numbers appear automatically at each workstation and are mated to pre-programmed survey instruments. As respondents answer questions, interviewers enter their answers into CATI's data file. Telephone numbers are stripped automatically from the data to ensure respondent anonymity. The CATI system eliminates out-of-range responses and wild codes by validating each response interactively and not allowing unacceptable responses. Thus, the CATI system eliminates many routine, error-prone coding and data entry tasks, enabling OSRL to maintain the highest standards of quality control.

APPENDIX 4 – ASSESSMENT OF TELECOMMUNICATIONS NEEDS - COMMUNITY SURVEY

The following pages contain the Community Survey instrument used in the SB 622 analysis. Outcomes are reported in the section titled “SB 622 Survey of Critical and Community User.”

APPENDIX 5 – ASSESSMENT OF TELECOMMUNICATIONS NEEDS – CRITICAL USERS SURVEY

The following pages contain the Critical Users Survey instrument used in the SB 622 analysis. Outcomes are reported in the section titled “SB 622 Survey of Critical and Community User.”

APPENDIX 6 – ROSEBURG CHAMBER OF COMMERCE TELECOMMUNICATIONS SURVEY



TELECOMMUNICATIONS SURVEY

The Telecommunications subcommittee is underway on a Telecommunications Strategic Plan for the area. We need just a couple of moments of your time to help us update some information. Countywide surveys conducted within the past two years gave us a good benchmark. We'd like to see what, if anything, has changed in a few of the categories surveyed.

Please complete the enclosed telecommunications survey (both sides – Home and Business) by checking all of the applicable items in each of the categories listed. Your responses will be factored into the planning process and so are very important.

Questions? Feel free to get in touch with the Strategic Planning Facilitator.

John Irwin

jirwin@mind.net

541.664.2456

Once you've completed the survey, PLEASE return the survey ASAP. *It's important!* Mail it using the stamped self-addressed envelope or drop it off at the Chamber office. Cut-off for participation is the first week in February. **MEMBERS WOULD LIKE TO SEE THE SURVEYS COMPLETED AND RETURNED BY FEBRUARY 4, 2002.**

410 SE Spruce Street / PO Box 1026 / Roseburg, OR 97470 / 541.672.2648 / FAX 541.673.7868

Results of this survey will be published on line at www.callineb.com (see DOCUMENTS page). Targeted timeframe for posting is March 1, 2002.

Thanks in advance for investing this time in your community.

Sincerely,

Roseburg Chamber of Commerce Telecommunications Subcommittee

Your Name (optional): _____

Business Name (optional): _____ Number of Employees: _____

Home Based Business: No Yes

Your location: Unincorporated area City (name of city _____)

HOME

Home telecommunications connections

✓ PLEASE CHECK ALL THAT APPLY

- Telephone lines
- Cable – TV
- Cable - modem

Wireless:

- Cell phone
- TV (Satellite)
- Internet

Importance of Internet Access

✓ PLEASE CHECK ONE

- Critical
- Very important
- Somewhat important
- Not important

Importance of Internet connection speed

✓ PLEASE CHECK ONE

- Critical
- Very important
- Somewhat important
- Not important

Internet Access At Home

✓ PLEASE CHECK ALL THAT APPLY

No Yes

If YES,

- Dial up over telephone line
- DSL
- Cable modem
- Wireless

Telephone lines in your home

✓ PLEASE CHECK ALL THAT APPLY

No Yes (Number of lines _____)

If YES, Used for...

- Personal/family use
- Dedicated for business use
- Internet dial-up
- Dedicated - FAX machine
- Shared – FAX / Internet / conversations

Computer and Internet Use

✓ PLEASE CHECK ALL THAT APPLY

- Have a personal computer (Number _____)
- Have basic computer skills
- Use email
- Use the World Wide Web
- Use a public computer to access the Internet
- Purchase items/services online
- Sell items/services online
- Online data processing (exchange reports, update databases, apply for permits, etc.)
- Work from home (check this if you are employed and use your home computer and Internet connection to work from your home)

Rate your overall home telecommunications service(s)

✓ PLEASE CHECK ONE

Excellent Good Fair Poor

List your communications service providers:

Additional Comments:

Please turn over and complete all appropriate responses on the other side.

BUSINESS

INTERNET

Your business sector

- ✓ PLEASE CHECK ALL THAT APPLY
- Healthcare
- Retail
- Government
- Manufacturing
- Not for profit
- Education
- Other (Specify _____)

Computer and Internet Use

- ✓ PLEASE CHECK ALL THAT APPLY
- Have a personal computer (Number _____)
- Have basic computer skills
- Use email
- Use the World Wide Web
- Use a public computer to access the Internet
- Purchase items/services online
- Sell items/services online
- Online data processing (exchange reports, update databases, apply for permits, etc.)

Importance of Internet Access

- ✓ PLEASE CHECK ONE
- Critical
- Very important
- Somewhat important
- Not important

Importance of Internet connection speed

- ✓ PLEASE CHECK ONE
- Critical
- Very important
- Somewhat important
- Not important

Internet Access At Your Business/Work

- ✓ PLEASE CHECK ALL THAT APPLY
- No Yes
- If YES,
- Dial up over telephone line
- DSL
- Cable modem
- Wireless
- T1, T3, OC3 (Dedicated Access)

TELEPHONE

Telephone lines in your business

- ✓ PLEASE CHECK ALL THAT APPLY
- No Yes (Number of lines _____)
- If YES, Used for...
- Personal/family use
- Dedicated for business use
- Internet dial-up
- Dedicated for FAX machine
- Shared - FAX/Internet/conversations

Business telecommunications connections

- ✓ PLEASE CHECK ALL THAT APPLY
- Telephone lines
- Cable – TV
- Cable - modem
- Wireless:
- Cell phone
- TV (Satellite)
- Internet

Connections – additional information

- ✓ PLEASE CHECK ALL THAT APPLY
- | <u>Current</u> | <u>Future</u> | |
|--------------------------|--------------------------|-------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | T-1 |
| <input type="checkbox"/> | <input type="checkbox"/> | DS-3 |
| <input type="checkbox"/> | <input type="checkbox"/> | OC-3 |
| <input type="checkbox"/> | <input type="checkbox"/> | Gigabit Ethernet |
| <input type="checkbox"/> | <input type="checkbox"/> | Fast Ethernet |
| <input type="checkbox"/> | <input type="checkbox"/> | Virtual Private Network |
| <input type="checkbox"/> | <input type="checkbox"/> | Other (specify _____) |

Rate your overall business telecommunications service(s)

- ✓ PLEASE CHECK ONE
- Excellent
- Good
- Fair
- Poor

List your communications service providers:

Website: No Yes
Hosting Location: Onsite At ISP

Please return the survey. *It's important!* - Mail it using the stamped self-addressed envelope or drop it off at the Chamber office.

APPENDIX 7 – REPORT ON OECD TELECOMMUNICATIONS SURVEY

Follow-up Meetings: Lane, Douglas, Coos Curry Counties - General Conclusions

- One significant aspect that came out of discussions about the survey and related matters was the importance of competitive forces.
- Most people who raised the issue were certain that competitive services would be a significant advantage for the residents and users in all communities.
- It would further the overall goals behind SB 622 a great deal if the projects developed under its guidance included a requirement that the carrier must make the 622 projects freely available to competitive forces.
- Given that the need to protect investments and preserve limited resources are given as the major reasons behind restricting competitive access to the local switching equipment, it should be possible make certain that the SB 622 projects have truly open access, because they are specifically categorized as being separate from the adequate return on expenses.

<http://www.econ.state.or.us/telecom/coclccd1.pdf>

Lane-Douglas-Coos-Curry Graphic Analysis

<http://www.econ.state.or.us/telecom/coclccd2.pdf>