

2024 Update

Port of Columbia County

Strategic Business Plan

January 2024 **DRAFT**



*Thank you –
to the Port of Columbia
County, its
stakeholders, and
community partners
for sharing their time
and insight in the
development of this
Strategic Business Plan*



**Port of Columbia County
2024 Strategic Business Plan Update - DRAFT**

**Submitted to
Port of Columbia County**

January 2024

Submitted by

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**PORT OF COLUMBIA COUNTY
2024 STRATEGIC BUSINESS PLAN UPDATE - DRAFT**

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1.0 INTRODUCTION AND STRATEGIC PLANNING PROCESS

1.1 PURPOSE

The Port of Columbia County (Port) 2024 Strategic Business Plan (the plan) builds upon past planning efforts and addresses the progress, as well as the challenges the Port has faced since completing its 2012 Strategic Business Plan and Capital Facility Plan. Since the adoption of the plan in 2012, the Port has eclipsed its planned capital investments target through completion of \$40 million in capital projects. This plan is intended to serve as the primary planning document to guide Port policies, projects, and practices over the 20-year planning horizon.

The plan was designed to comply with the strategic business plan requirements of Business Oregon and serves as a communication tool between the Port and the state. Once the state has accepted the plan and agreements are in place, the Port will become eligible for State Planning and Marketing funds for implementation (Oregon Administrative Rules [OAR] 123, Division 25). Further, the plan acts as a blueprint for Port Commissioners, staff, stakeholders, tenants, and the public in understanding the Port's mission, goals, priority projects, and key strategies going forward. It can be used as a basis for grant funding and to bring partners together to address common project goals. The plan is designed to be a flexible guide for the Port Commission as it sets priorities and policies. To that end, policies and capital improvement priorities should be reviewed annually in conjunction with the Port's budgeting process. A full update to the Strategic Business Plan is recommended every five years and is required at ten-year intervals.

1.2 PLAN DEVELOPMENT AND ORGANIZATION

This plan update is the result of various planning, market and financial, and facility assessments undertaken in 2023 and early 2024 that included coordination with the Port Commission, staff, tenants, and local and regional partners. These efforts helped define the current and future role of the Port and how new and long-standing goals will be achieved. To inform the recommendations outlined in this plan, key Port facilities and operations were evaluated. In addition, a market analysis was commissioned to evaluate economic and demographic realities and trends highlighting potential opportunities for the Port to make sound investments and propel economic growth.

This document is organized into eight sections as follows.

- **Introduction and Strategic Planning Process:** Provides a brief overview of the plan purpose, formation, and outreach conducted during plan development.
- **Port History and Background:** Describes the origins of the Port and significant milestones in its history.
- **Port Vision, Mission, and Goals:** Identifies the Port's vision and mission statements and overarching goals to achieve this mission and long-term vision.

- **Port Overview:** Provides an overview of Port properties, facilities, and transportation and utility infrastructure, as well as the current Port Commission, staff, and strategic partners.
- **Policy Context and Situational Analysis:** Identifies prior Port and strategic partner planning efforts, outlines applicable plans and policies that will affect future development at the Port, and highlights the economic and community benefits of the Port.
- **Market Analysis and Opportunities:** Provides a summary of current demographic, industry trends, and market opportunities for the Port.
- **Strategic Business Plan Elements:** Provides capital improvement priorities and goals and policies to inform Port management, financial, environmental, and marketing decisions.
- **Priority Projects:** Highlights future infrastructure projects identified by the Port for the expansion of business operations and continued economic growth along with planning-level cost estimates for these projects.

1.3 COMMISSIONER, STAKEHOLDERS, AND PUBLIC OUTREACH

The plan, which includes the Port’s capital improvement plan, was developed with extensive public outreach, including Port Commission and public meetings, two surveys, and stakeholder interviews. Summaries of outreach efforts are included in Appendix A.

A kickoff meeting was held with Port Commissioners and staff in August 2023 to introduce the planning process, discuss progress of the 2012 plan, and to hold a strengths, weaknesses, opportunities, and threats (SWOT) analysis. Coinciding with the kickoff, stakeholder interviews were conducted based on a series of questions regarding local market and growth opportunities, priorities for infrastructure improvements, and the Port’s role in integrating diversity, equity, and inclusion and climate priorities. Eight stakeholders were interviewed during the strategic planning process, including Port tenants, project partners, and local government officials.

Three additional Port Commission and public open house meetings were held to collect input and feedback from the community and the Commission. The first two meetings were held in October 2023 in Rainier and St. Helens to review key findings from the SWOT analysis, facilities assessment, and marketing and financial analysis, and to workshop the Port’s vision and mission statement. An online survey was conducted in conjunction with the first two public meetings to solicit input on the existing conditions and begin to identify strategic priorities for the future.

The third meeting was held at the Port Office in Columbia City in December 2023 to review the draft plan elements, present key findings, and gather feedback on the preliminary priority projects. At the meeting, members of the public expressed a desire for more emphasis on public outreach for the plan development. As a result, a second

online survey was conducted in conjunction with the release of the draft plan to solicit specific comments on the draft plan prior to being presented to the Port Commission.

2.0 PORT HISTORY AND BACKGROUND

The Port was created in 1940 under Oregon Revised Statute (ORS) Chapter 777 to pursue economic development activities. The Port is a special district with boundaries that span 51 miles along the Columbia River and includes the cities of Scappoose, St. Helens, Columbia City, Prescott, Rainier, and Clatskanie. The Port district is shown in Figure 1. The Port was renamed from Port of St. Helens to Port of Columbia County during a rebranding process in 2018 to be more representative of the entire district.

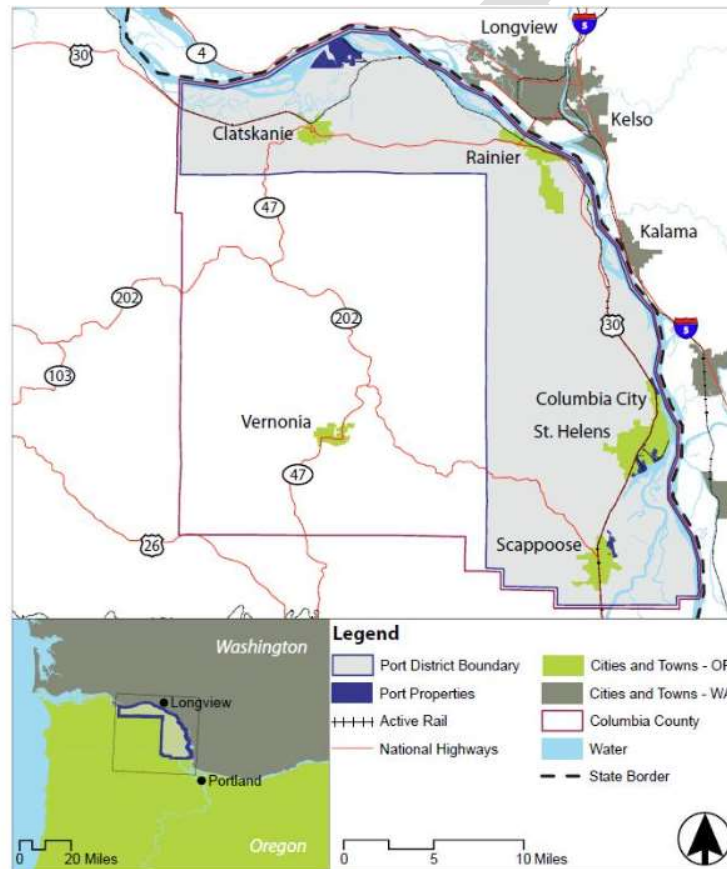


Figure 1. Port District Map

Columbia County, named for the Columbia River, was established in 1854. The county covers 646 square miles and is bordered on the north and east by the Columbia River, on the west by Clatsop County, and on the south by Washington and Multnomah Counties. Columbia County was the sixteenth county created in Oregon and is the third smallest county in the state, after Multnomah and Hood River Counties.

Lewis and Clark explored this area in 1805-1806. Early settlements were established by fur traders as early as 1810. As American immigration increased in the mid-1840s, lasting settlements began to appear. The Yakima Indian War (1855-1859) drove many

Washington Territory residents south of the Columbia River and helped boost the populations of St. Helens and Columbia City.

The county's total population grew from roughly 32,000 in 1975 to about 50,000 in 2015. The highest growth rates occurred during the late 1970s (2.2 percent) during a period of relative economic prosperity whereas the growth rate between 2010 and 2015 was 0.4 percent.

The traditional industries of Columbia County are timber, fishing, water transportation, dairying, horticulture, and recreation. The extensive stands of old growth timber, which had attracted many of the early settlers to the area, were completely logged over by the 1950s. Second growth timber provides the raw material for local lumber and paper mills.

Today, the Port owns eight industrial properties, totaling approximately 2,400 acres, including sites with excellent highway, rail, airport, and maritime access. The Port also owns and manages recreational properties at Scappoose Bay Marine Park and Bayport RV Park and Campground.

Recent developments and investments made in the Port district since the 2012 Plan include the following.

- Hermo Road Extension Design at Port Westward (in process)
- Rezone of Agricultural Land to Industrial Land at Port Westward (in process)
- Dredging at Scappoose Bay Marina (anticipated 2024)
- Permits and Preliminary Engineering for Speculative Building at McNulty Industrial Park (2022)
- Remedial Investigation and Feasibility Study at Railroad Avenue (2022)
- Columbia County Industrial Land Inventory (2022)
- Columbia County Rail Safety and Mobility Study (2022)
- New Corporate Hangar Building at Scappoose Airport (2021)
- McNulty Industrial Park Wetlands Engineering and Certified Shovel-ready by State of Oregon (2021)
- Westside Water & Sewer Project at Scappoose Airport (2019)
- Dock Demolition/Maintenance at Multnomah Industrial Park (2019)
- Taxiway Relocation at Scappoose Airport (2019)
- Port Rebranding from Port of St. Helens (2018)
- Construction of Building E at Multnomah Industrial Park (2018)
- Public Viewing Area Project at Scappoose Airport (2018)
- Port Westward Beaver Dock Extension – Berth 1 (2017)
- Clatskanie Business Center Rezone to Light-Industrial (2016)
- Scappoose Airport Master Plan Update (2015)
- Dredging at Scappoose Bay Marina (2015)
- Bridge Improvements at Railroad Avenue (2014)
- Transient Dock Extension at Scappoose Bay Marina (2013)

- Trail Repaving at Scappoose Bay Marina (2013)
- Bayport RV Park Opening at Scappoose Bay Marina (2013)
- Port Westward Water System (2012)
- D Dock Roof at Scappoose Bay Marina (2012)
- Structural and Environmental Assessment at Clatskanie Business Center (2012)

3.0 GUIDING PRINCIPLES, VISION, AND MISSION STATEMENT

The Port’s Vision and Mission Statement were updated as part of the process of developing this strategic business plan update. The Port Commission identified guiding principles that shape the direction for the district and inform the Vision and Mission Statement. The Vision outlines the Port’s forecast for successful outcomes and the Mission Statement reflects the Port’s purpose and achievable goals for the future.

Guiding Principles

- Fiscal and environmental sustainability
- Adaptability
- Accountability
- Integrity
- Opportunities for all

Vision

The Port of Columbia County demonstrates core values to achieve economic return on investments and support local businesses. In achieving its vision, the Port strives to foster economic development, improve opportunities for all, and be future-oriented.

Mission Statement

The Port of Columbia County's mission is to create a positive economic impact while maintaining the environmental assets of the district.

4.0 PORT OVERVIEW

4.1 PORT COMMISSION AND STAFF

The Port is governed by ORS 777 and a five-member commission that is elected by Port District voters. Port Commissioners and staff are supported by three committees: the Scappoose Bay Marine Park Advisory Committee, the Scappoose Airport Advisory Committee, and the Port Budget Committee. Committee members are appointed for a three-year term, and applicants are solicited through public notices and evaluated on an objective basis.

4.2 PORT POLICIES AND PROCEDURES

The Port revised a policy manual in 2016 to orient new board members and to act as a policy guide for Port operations and behavior. The policy manual should be reviewed by staff to ensure it is current and updated to reflect current Port branding as the Port of Columbia County.

4.3 STRATEGIC PARTNERS

Ongoing coordination and collaboration with local, regional, state, and federal partners allows the Port to leverage its resources to fulfill its mission and manage its assets. Ongoing coordination and compliance with the five local cities within the Port district boundary is paramount for the future of the Port. Maintaining relationships with the following public and private entities is key to the Port's success.

- U.S. Department of Transportation
- Federal Aviation Administration (FAA)
- U.S. Army Corps of Engineers
- Business Oregon and the Infrastructure Finance Authority
- Oregon Department of Aviation (ODAV)
- Oregon Department of Land Conservation and Development
- Oregon Department of Fish and Wildlife
- Oregon Department of Transportation (ODOT)
- Oregon Department of State Lands
- Oregon Water Resources Department
- Oregon Public Ports Association
- Special Districts Association of Oregon
- Columbia County
- City of Clatskanie
- City of Rainier
- City of Columbia City
- City of St. Helens
- City of Scappoose
- Columbia Economic Team
- Portland Community College
- Oregon Manufacturing Innovation Center
- Oregon State Marine Board
- Scappoose Bay Watershed Council
- Lower Columbia Estuary Partnership
- Local School Districts
- Local Businesses and Tenants

4.4 PORT PROPERTIES AND FACILITIES

The Port has made substantial investments in facilities and infrastructure to serve key industries and contribute to the economic development of the region. The Port's diverse portfolio of properties and facilities is a notable strength of the agency. The Port district extends for 51 miles and the Port's properties cover more than 2,400 acres of land in Columbia County. The Port owns eight different industrial sites: (1) Clatskanie Business Center, (2) Port Westward Industrial Park, (3) Columbia City Industrial Park, (4) Milton Creek Industrial Park, (5) McNulty Creek Industrial Park, (6) Multnomah Industrial Park,

(7) Railroad Corridor, and (8) Scappoose Airport. In addition, the Port owns and operates the Scappoose Bay Marine Park and Bayport RV Park and Campground.

In conjunction with the development of this strategic business plan, WSP performed a streamlined facilities condition assessment of properties at these facilities. The assessment recommended several improvements for the Port to consider. The assessment results are discussed in the memorandum included in Appendix B. Summary descriptions of the Port’s business parks follow below, organized by north and south counties (Figures 2 and 5).



Figure 2. Port Facility Locations – North County

4.4.1 Port Westward Industrial Park

Port Westward consists of 1,602.29 acres, 674.5 acres of which is leased to Portland General Electric (PGE); 43 acres leased to Cascade Kelly Holdings, LLC (Global Partners’ Columbia Pacific Bio-Refinery); 90 acres is leased to NEXT Renewable Fuels; 3.2 acres to the Clatskanie Public Utility District (PUD); 211 acres leased to Warren and Caryn Seely; and 243 acres to Columbia River Ranch. See Figure 3. Port tenants use the land for industrial and agricultural purposes. An additional 194 acres outside of Clatskanie (in the Clatskanie Drainage Improvement District) could be used for wetland mitigation or agriculture use. The facilities condition assessment (Appendix B) recommends increased dock capacity, west dolphin replacement, upgrades to the water intake system, improvements to fire suppression, seismic upgrades, and completing the Hermo Road access to the site.



Figure 3. Port Westward

4.4.2 Clatskanie Business Center

The Port owns approximately 1.53 acres of property at the business center, which includes the old Middle School building on SW Bryant Street. Recommendations for the business center include demolition, sale, or repurposing the outdated building. See Figure 4.



Figure 4. Clatskanie Business Center

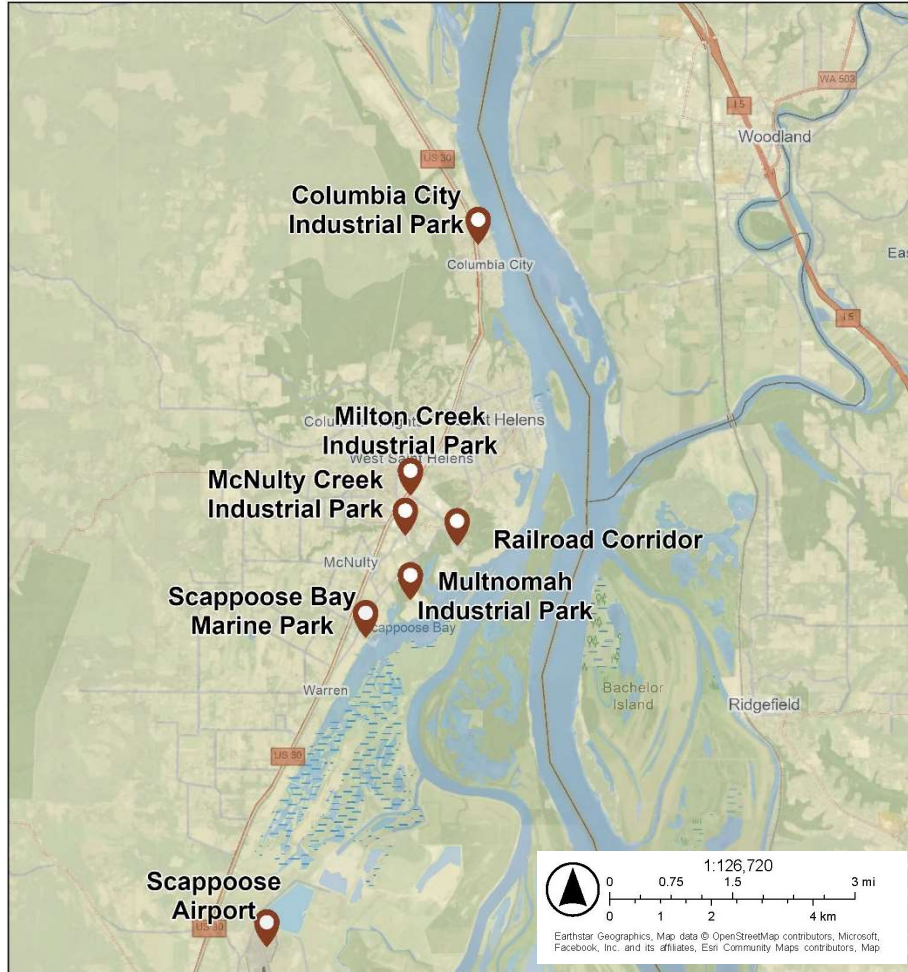


Figure 5. Port Facility Locations – South County

4.4.3 *Columbia City Industrial Park*

The Columbia City Industrial Park comprises 93 acres with 35 acres available for lease. The Port administrative office is located at this site. Current tenants include Lignetics, Clearwater Paper Corporation, and Michels Pipeline. The Columbia City dog park is also located at this site. The facilities assessment recommends improvements to the existing rail spur and dock inspection, as well as leveling and paving to increase capacity for heavy-haul usage. See Figure 6.



Figure 6. Columbia City Industrial Park

4.4.4 Milton Creek Industrial Park

Milton Creek Industrial Park is approximately 83 acres in size and is mostly developed; existing buildings are 100 percent occupied. The park's primary tenant is RainShadow Labs. The facilities assessment recommended property acquisition along Port Avenue, as well as site design and partitioning of the 300 – 700 Port Avenue properties. See Figure 7.



Figure 7. Industrial Building at Milton Creek Industrial Park

4.4.5 McNulty Creek Industrial Park

McNulty Creek Industrial Park covers about 54 acres, with 37 acres available for lease. The primary current tenant is Kinnear Specialties that uses the property for manufacturing. The facilities assessment recommends speculative industrial development, as well as rail spur maintenance. See Figure 8.



Figure 8. McNulty Creek Industrial Park

4.4.6 Railroad Corridor

Railroad Corridor is an approximate 104-acre site. Current tenants are industrial in nature and use the land for waste management services. The Port is working with the Oregon Department of Environmental Quality (DEQ) to clean up 25 acres of a former wood treatment property. In addition to DEQ cleanup, the facilities assessment recommended replacement of the Bailey Bridge or construction of a secondary access road to the “no further action” portion of the site. See Figure 9.



Figure 9. Railroad Corridor

4.4.7 Multnomah Industrial Park

Multnomah Industrial Park includes approximately 155 acres. Current tenants include Composites Universal Group, an advanced composites manufacturer; ORPET, a post-consumer plastic bottle recycling facility; Stella-Jones Corporation, a manufacturing center; U.S. Pipe, a pipe manufacturer; and Even Construction, a custom floating home builder. The facilities assessment recommended site development along Old Portland Road, rail spur maintenance, site paving, construction of a new Port maintenance shop,

environmental remediation, and upgrading the heating, ventilation, and air conditioning system. See Figure 10.



Figure 10. Multnomah Industrial Park

4.4.8 Scappoose Airport

The Scappoose Airport is 196 acres, including industrial properties available for lease. The airport includes a 5,100-foot runway, two parallel taxiways, standard lighting, precision approach path indicator lighting, and a weather reporting station. The Port owns and maintains the airport while the on-site fixed-base operator is privately owned. The facilities assessment recommended taxiway resurfacing, runway rehabilitation phases II and III, east side hangar demolition and replacement, and east side waterline extension. The Airport Master Plan will also need to be updated within the duration of the plan. See Figure 11.



Figure 11. Scappoose Airport

4.4.9 Scappoose Bay Marine Park

The Scappoose Bay Marine Park is a 26-acre site along the Columbia River. Port tenants are primarily recreational, offering access to the Scappoose Bay. The facilities assessment recommended ongoing dredging within the marina, expansion of the RV park, and improvements to the marina identified as the Marina Improvement Project. See Figure 12.



Figure 12. Scappoose Bay Marine Park

4.5 PORT UTILITIES AND TRANSPORTATION

4.5.1 Public Street Access

All Port facilities are accessible through public streets. U.S. Highway 30 serves as a critical point of access for many of the facilities. Additionally, arterials and collector streets maintained by local jurisdictions provide access to and through industrial parks. Port Westward is primarily served by Kallunki Road, which ties into Quincy Mayger Road. The Clatskanie Business Center is accessed off U.S. Highway 30 at SW Bryant Street. The Columbia City Industrial Park is accessible from U.S. Highway 30 towards the north end of the site and by E Street in Columbia City on the south end. McNulty Industrial Park is accessible from McNulty Way, a collector street that ties into Gable Road and U.S. Highway 30. Milton Creek Industrial Park is accessed through Port Avenue and Milton Way, which both run parallel to U.S. Highway 30. Multnomah Industrial Park is accessible through Old Portland Road, a minor arterial. Railroad Corridor is accessed through Railroad Avenue. Additionally, a Bailey Bridge provides access to the southern portion of the site over Milton Creek. Scappoose Airport is accessed from Honeyman Road, which connects to West Lane Road. The Scappoose Bay Marine Park is accessed off Old Portland Road just north of U.S. Highway 30.

4.5.2 Rail Access

The Scappoose Airport, Scappoose Bay Marine Park, and Clatskanie Business Center have no rail access, but the other Port facilities have rail access available. The Port owns a rail lead at Port Westward that connects to the Portland & Western Railroad mainline.

The Port's rail lead connects to a spur serving the Columbia Pacific Bio Refinery. Another spur leads to PGE's Beaver Plant. The Port's lead has sufficient capacity to support current and future tenants.

The Portland & Western Railroad mainline runs along the western side of the property at the Columbia City Industrial Park, with two spurs available. An existing Port-owned railroad spur bisects the McNulty Creek Industrial Park and connects to the Portland & Western Railroad mainline, ending at the Multnomah Industrial Park. The facilities assessment recommended rail spur maintenance at McNulty Creek Industrial Park and Multnomah Industrial Park. A spur parallels the mainline running almost the entire length of the Milton Creek Industrial Park and continues to bisect Railroad Corridor.

4.5.3 Marine Access

There is no marine access at the McNulty Creek Industrial Park, Milton Creek Industrial Park, Scappoose Airport, or Clatskanie Business Center. However, marine access is a key asset for many of the Port facilities. Columbia City Industrial Park has a dock at the northern end of the property that is used by Clearwater Paper Corp. However, the dock needs structural inspection, surface repaving, and pile replacement and the current river depth only allows for barge traffic. The Multnomah Industrial Park has access to a boat ramp for industrial tenants and one dock currently used by Even Construction. Port Westward has deepwater access surrounding the 1,600-foot Beaver Dock. Berth 2's mooring dolphin has reached the end of its useful life and is due to be replaced. There is marine access from a small float dock at Railroad Corridor, although the small dock is not appropriate for commercial use. The Scappoose Bay Marine Park is unique in that it offers recreational marine access to the Columbia River. Ongoing dredging is required in the marina to maintain river access.

4.5.4 Sanitary Sewer

Sanitary sewer facilities are available at all Port facilities through septic systems or gravity sanitary sewer. Public systems are maintained by local jurisdictions. The Port owns a water discharge system at Port Westward that is used by tenants for industrial purposes; this system is not used to treat or dispose of sewage.

4.5.5 Water

Water services are provided by local jurisdictions at all Port facilities. The Port owns and operates a water intake system at Port Westward that provides tenants with raw water for industrial use (primarily cooling and fire protection). In addition, the Port has undeveloped water rights for 18 cubic feet per second from four wells. The facilities assessment recommended improvements to the fire system at Port Westward.

4.5.6 Electrical Power and Natural Gas

Electrical power, provided by Columbia River PUD at its south county properties and Clatskanie PUD at Port Westward and Clatskanie Business Center, is available at all Port facilities. The nearest natural gas connection to the Scappoose Airport is about 1.5 miles away; however, it is a high-pressure line, so capacity is available for the future if the

mainline is extended. Natural gas, provided by NW Natural, is available at all other Port facilities.

4.5.7 *Communications*

Xfinity (Comcast) currently provides broadband and telephone service to Columbia City Industrial Park, McNulty Creek Industrial Park, Milton Creek Industrial Park, Multnomah Industrial Park, Scappoose Airport, and the Scappoose Bay Marine Park. Xfinity is exploring service options at Railroad Corridor. Broadband and telephone service is provided by Cascade Networks at Clatskanie Business Center.

4.5.8 *Buildings and Structures*

The facilities assessment identifies the need for improvements to buildings and structures at Port facilities, as well as recommendations for structural evaluations of Port docks at marine facilities (Appendix B).

5.0 **POLICY CONTEXT AND SITUATIONAL ANALYSIS**

The following sections describe local, regional, and state planning and policy documents that may affect the development of Port properties and the Port's ability to implement this strategic business plan. This strategic business plan aims to capture and, where applicable, update or implement key plans and projects included in the following related planning projects.

Port-led Planning Projects

- Port Westward Water Management and Conservation Plan (2024)
- Strategic Business Plan (2012)
- Columbia County Industrial Land Inventory Project (2022)
- Scappoose Airport Master Plan Update (2015)
- Viewing Area Project (2017)
- FAA Taxiway B Relocation (2018)
- Scappoose Airport Westside Water & Sewer Project (2019)
- Structural and Environmental Assessment for Clatskanie Business Center (2012)
- Remedial Investigation and Feasibility Study for Railroad Avenue (2022)
- Columbia County Rail Safety & Mobility Study (2022)
- Lower Columbia River Corridor Rail Safety Study (Columbia and Clatsop Counties 2009)

Strategic Partner Planning Projects

- Columbia County Comprehensive Plan (integrated through October 12, 2023)
- City of Scappoose Economic Opportunities Analysis (draft January 2023)
- Coordinated Population Forecast for Columbia County, its Urban Growth Boundaries (UGB), and Areas outside UGBs 2017-2067 (2017)
- Columbia County Transportation System Plan (TSP) (2017)
- Columbia County Housing Report (2017)
- City of Scappoose Housing Needs Analysis (2017)
- City of Scappoose Parks Master Plan Update 2022-2023 (in progress)

- St. Helens Industrial Business Park Funding Plan (2020)
- St. Helens Parks and Trails Master Plan (2015)
- St. Helens Transportation System Plan (2011)
- City of Scappoose Economic Opportunities Analysis (2011)
- Comprehensive Plan Guideline for Washington Public Ports (2009)
- Clatskanie Transportation Refinement Plan (2005)

5.1 CONSISTENCY WITH STATE, REGIONAL, AND LOCAL PLANS AND POLICIES

The successful implementation of this strategic business plan is dependent upon coordination with state, regional, and local planning efforts. The sections below address policy and guidance documents that may affect development on Port property and should be considered in conjunction with future projects.

5.1.1 *Oregon Revised Statutes (ORS) Chapter 777*

ORS Chapter 777 designates Oregon ports as special districts. These statutes give ports many of the standard powers of a public entity, including the ability to levy taxes, borrow money, issue bonds, and charge for services. ORS 777.065 declares that the development of deepwater port facilities at certain ports, such as Port Westward, is a state economic goal of high priority and requires state agencies to assist ports in this endeavor. The strategic business plan helps meet economic development goals outlined by the state and helps the Port acquire state funding for implementing projects.

5.1.2 *Ports 2010 – A New Strategic Business Plan for Oregon’s Statewide Port System*

In 2010, the Oregon Business Development Department and the Infrastructure Finance Authority (IFA) prepared and adopted *Ports 2010: A New Strategic Business Plan for Oregon’s Statewide Port System* (Ports 2010). The purpose of Ports 2010 is to “Define the State of Oregon’s future role, interest, and investment in the statewide port system. It will identify infrastructure, equipment, administrative, regulatory, and governance needs of the ports and also identify ways that Oregon’s port system can best serve the interest of the State of Oregon and its residents.”

In addition, Ports 2010 includes a business plan template to serve as a guide for individual port strategic business plans in order to be consistent with the Statewide Strategic Port Plan. This Port of Columbia County Strategic Business Plan Update was developed to meet the state template and once complete, is subject to final review by the IFA through its peer-review process.

5.1.3 *Statewide Planning Goals*

The Port developed its strategic business plan update to be consistent with the statewide planning goals as required by Ports 2010. The following statewide planning goals are most applicable to the Port’s planning efforts.

Statewide Planning Goal 9 – Economic Development

To provide adequate opportunities throughout the state for a variety of economic activities vital to the health, welfare, and prosperity of Oregon’s citizens.

Oregon Planning Goal 9 states that local jurisdictions should maintain a 20-year supply of lands suitable for economic growth to meet the needs of local business and industry likely to locate in the area during this period. The Port owns more than 2,000 acres of land with large portions of undeveloped and leasable land. Most of the Port-owned land is zoned for industrial development. A locational advantage of the Port is its proximity to multimodal transportation facilities and a variety of tenants. Port tenants include small-scale manufacturers and utility providers from industries, including waste management, aviation, floating home construction, and energy facilities.

As the second busiest non-towered general aviation airport in Oregon and the largest in Columbia County, Scappoose Airport is a public use facility that is owned and operated by the Port. The airport serves a variety of airport business tenants with a group of light industrial properties that are currently available for lease. An Airport Master Plan update in 2015 identified build alternatives for the Scappoose Airport and examined potential development beyond a 20-year Master Plan period.

The Port is actively pursuing opportunities to leverage partnerships with organizations, such as the Columbia Economic Team, Business Oregon, Greater Portland Inc, and Columbia Pacific Economic Development District. These partnerships can help the Port identify new tenants for the Port's array of undeveloped and leasable land. Organizations, such as Business Oregon, provide their own list of target industries that can be used to inform the Port's decision-making process for priority projects. Priority projects for the Port include maintenance of Port Westward, as well as the development and expansion of industrial park sites and buildings.

In addition to providing leasable land and business opportunities, the Port also provides recreational opportunities at Scappoose Bay Marine Park, which offers public boat launch with access to the Columbia River and a separate dock for launching kayaks, canoes, and stand-up paddle boards. Additional recreational activities are available, including the Bayport RV Park and Campground, gazebo and picnic area, and a nature walking trail.

Statewide Planning Goal 12 – Transportation

To provide and encourage a safe, convenient and economic transportation system.

The Transportation Planning Rule, OAR 660 Division 12, requires that cities, counties, Metropolitan Planning Organizations (MPOs), and state agencies implement Statewide Planning Goal 12 and prepare and adopt transportation system plans.

The Transportation System Plan (TSP) for Columbia County was implemented in 2017. The TSP includes a multimodal, network-wide approach to identify transportation systems solutions for projects in categories, such as freight. The Port has been an active member in coordinating with the County and other local jurisdictions in this approach. This partnership is mutually beneficial for the Port and each jurisdiction as transportation planning can provide for future freight facility needs and support industrial development while mitigating negative impacts to the transportation system.

The Oregon Department of Transportation (ODOT) has classified U.S. Highway 30 as a freight route and a reduction review route through Columbia County. U.S. Highway 30 serves as an important transportation resource for the movement of truck freight between major destinations, such as ports and harbors. Most of the Port's facilities and land are located within close proximity of U.S. Highway 30 and many of the Port's tenants rely on the roadway for access to local and outside markets. Ensuring that this roadway is designed and managed to safely accommodate the movement of goods is a priority for the Port.

Statewide Planning Goal 14 – Urbanization

To provide for an orderly and efficient transition from rural to urban land use, to accommodate urban population and urban employment inside urban growth boundaries, to ensure efficient use of land, and to provide for livable communities.

The availability of industrial park sites and buildings provides the Port and its tenants with significant employment opportunities and the ability to develop infrastructure to accommodate growth in the planning horizon. The Port is projecting a range of 4,211 to 10,944 net new jobs over the next 20 years in Columbia County (see Market Analysis for details). Currently, some of the largest employers among the Port's tenants include Portland General Electric (PGE), ORPET, Oregon Aero, Composites Universal Group, RainShadow Labs, Lignetics Group, Global Partners' Columbia Pacific Bio-Refinery, and U.S. Pipe. Port-owned land is supportive of City/County zoning districts that allow for industrial uses and future development. The Port will continue to work with the County and state to ensure an orderly and efficient transition from rural to urban land use.

Job growth in the County will impact the demand for housing to accommodate new workers. Population forecasts for Columbia County, analyzed by Portland State University's Population Research Center, show an increase of 20,000 people (40 percent) between 2017 and 2067 for a combined population of 71,988 in 2067. This increase in population will require new housing units to meet demand and allow employers to attract new employees. While the Port does not supply housing, it supports efforts by the County, community partners, and other jurisdictions to provide housing opportunities. Maintaining a quality of life standard through housing affordability will benefit the Port in their land development efforts and help attract new businesses.

5.1.4 Columbia County Comprehensive Plan

The Port developed its strategic business plan update to be consistent with the Columbia County comprehensive plan. The Port's mission is most directly related to the Economy element of the comprehensive plan and goals: *to strengthen and diversify the economy of Columbia County and insure stable economic growth; and to utilize Columbia County's natural resources and advantages for expanding and diversifying the economic base.* The Port's facilities provide critical economic activity and support 1,429 jobs. Additionally, the Port's diverse portfolio and utilization of the region's natural capital and other advantages will be leveraged to expand the County's economic base.

5.1.5 Zoning

Port-owned property must comply with the zoning and development standards of the Columbia County Zoning Ordinance, and with the relevant development codes of Clatskanie, Columbia City, Rainier, St. Helens, and Scappoose. The table below identifies the zoning designation and key zoning considerations of each Port-owned tax lot.

Table 1. Port Property Zoning

	Tax Lot	Zoning	Zoning Considerations (Jurisdiction)
Clatskanie Business Center	7408-CD-02101	ED	<p>ED – Employment District (City of Clatskanie):</p> <ul style="list-style-type: none"> Provides for a variety of employment opportunities, such as office, retail, or manufacturing, in an aesthetic environment and having a minimal impact on surrounding uses. Permitted uses include banks, conference facilities, business services, offices, postal services, printing/photography services, and software development. Conditional uses include clinics and medical facilities, warehouses, dry cleaners, light manufacturing, and educational institutions.
Columbia City Industrial Park	5121-00-00400	I	<p>I – Industrial (City of Columbia City):</p> <ul style="list-style-type: none"> Provides for access to the Columbia River and/or US Highway 30 and appropriate locations for industrial uses, marine-related uses including recreation, and limited commercial uses in support of industrial uses or requiring larger tracts of land with storage outside a structure. Permitted uses include manufacturing, packaging, utilities commercial uses required large storage areas, and other storage and distribution uses and public facilities. Conditional uses include safety facilities, parking, medical facilities, public works, and other uses subject to review. <p>R-2 – Moderate Density Residential (City of Columbia City):</p> <ul style="list-style-type: none"> Provides for residential use in areas of moderate concentration. Permitted uses include residential buildings, day care and residential care, and accessory buildings. Conditional uses include churches, greenhouses, schools, and other community buildings.
	5128-AC-01399	R-2	
McNulty Creek Industrial Park	4108-00-00307	HI	<p>HI – Heavy Industrial (City of St Helens):</p> <ul style="list-style-type: none"> Provides appropriate locations for intensive manufacturing activities and activities that need to be separated from more easily impacted activities, such as schools, churches, etc. Permitted uses include fabrication, processing, or assembling of semi-finished or finished products from raw materials, outdoor storage areas, and the storage of heavy equipment. Conditional uses include caretaker dwelling, entertainment, hazardous waste collection and treatment, mineral resource development, on-site retailing, parks, utilities, and other public facilities.
	4108-AD-01600	HI	
	4108-AD-01500	HI	
	4108-D0-00300	HI	
	4108-DB-00300	HI	
	4108-D0-00310	N/A	
	4108-D0-00200	HI	
4108-DB-00200	N/A		

Milton Creek Industrial Park	4104-CC-00400	LI	<p>LI – Light Industrial (City of St. Helens):</p> <ul style="list-style-type: none"> Provides locations for general industrial use, including light manufacturing and related activities with few, if any, nuisance characteristics. Permitted uses include agricultural supply and sales, animal sales and services, auction sales, boat repair and other maintenance services, equipment and automobile sales, utility distribution, minor public facilities, and other whole trade operations. <p>HI – Heavy Industrial (City of St. Helens):</p> <ul style="list-style-type: none"> Provides appropriate locations for intensive manufacturing activities and activities that need to be separated from more easily impacted activities, such as schools, churches, etc. Permitted uses include fabrication, processing, or assembling of semifinished or finished products from raw materials, outdoor storage areas, and the storage of heavy equipment. Conditional uses include caretaker dwelling, entertainment, hazardous waste collection and treatment, mineral resource development, on-site retailing, parks, utilities, and other public facilities.
	4104-CC-00500	LI	
	4104-CC-00600	LI	
	4104-CC-00700	LI	
	4104-CC-00800	LI	
	4104-CC-00900	LI	
	4104-CC-01000	LI	
	4104-CC-01100	LI	
	4105-DD-03400	LI	
	4108-AA-01200	LI/HI	
	4108-AA-00700	HI	
	4109-B0-00700	HI	
	4109-B0-00800	HI	
	4109-B0-00900	HI	
4109-00-00700	HI		
Multnomah Industrial Park	4108-D0-01000	M-1	<p>HI – Heavy Industrial (City of St. Helens):</p> <ul style="list-style-type: none"> Provides appropriate locations for intensive manufacturing activities and activities that need to be separated from more easily impacted activities, such as schools, churches, etc. Permitted uses include fabrication, processing, outdoor storage areas, and the storage of heavy equipment. Conditional uses include caretaker dwelling, entertainment, hazardous waste collection and treatment, mineral resource development, on-site retailing, parks, utilities, and other public facilities. <p>M-1 – Heavy Industrial (Columbia County):</p> <ul style="list-style-type: none"> Provides for industrial operations that generate noise, odor, dust, glare, vibration, or truck and rail traffic in such amounts as to be objectionable to adjacent land uses. Permitted uses include automobile wrecking or manufacturing, machine shop, dry cleaning, feed and fuel storage, and numerous other manufacturing and associated uses. Conditional uses include kennels.
	4108-D0-01004	M-1	
	4108-D0-01001	HI	
	4108-D0-00900	HI	
	4108-D0-01003	M-1	
	4108-D0-01002	M-1	
	4117-00-00100	HI	
Port Westward Industrial Park	8415-00-00100	RIPD	<p>RIPD – Resource Related Industrial Use on Rural Land (Columbia County):</p> <ul style="list-style-type: none"> Provides for rural and natural resources related industries which are land extensive and are consistent with the rural facilities and services. Permitted uses include farm use, and management, production and harvesting of forest products. Conditional uses include production, processing, assembling, and packaging of materials. <p>PA-80 – Primary Agriculture Use Zone (Columbia County)</p> <ul style="list-style-type: none"> Provides for prime agricultural lands and farm use areas, open space, watershed protection, and maintenance of clean air, water, and habitat.
	8415-00-00200	RIPD	
	8415-00-00300	RIPD	
	8416-00-00100	RIPD	
	8416-00-00200	RIPD	
	8421-00-00700	RIPD	
	8422-00-00100	RIPD	
	8422-00-00200	RIPD	
	8422-00-01100	RIPD	
	8422-00-01100	RIPD	
8415-00-00100	PA-80		
8421-00-00300	PA-80		

	8421-00-00400	PA-80	
	8421-00-00500	PA-80	
	8421-00-00600	PA-80	
	8422-00-00400	PA-80	
	8422-00-00500	PA-80	
	8422-00-00600	PA-80	
	8422-00-00700	PA-80	
	8423-00-00900	PA-80	
	8423-B0-00400	PA-80	
	8423-B0-00500	PA-80	
	8423-B0-00600	PA-80	
	8423-B0-00700	PA-80	
Railroad Corridor	4109-00-00700	HI	<p>HI – Heavy Industrial (City of St Helens):</p> <ul style="list-style-type: none"> Provides appropriate locations for intensive manufacturing activities and activities that need to be separated from more easily impacted activities such as schools, churches, etc. Permitted uses include fabrication, processing, or assembling of semi-finished or finished products from raw materials, outdoor storage areas, and the storage of heavy equipment. Conditional uses include caretaker dwelling, entertainment, hazardous waste collection and treatment, mineral resource development, on-site retailing, parks, utilities, and other public facilities.
	4109-AB-00800	HI	
	4109-00-00200	HI	
	4109-B0-00300	HI	
	4109-BA-00800	HI	
	4109-BA-00600	HI	
	4109-BA-01200	HI	
	4109-BA-00900	HI	
	4109-BD-00100	HI	
	4109-BA-01100	HI	
	4109-BD-00200	HI	
	4109-BD-00300	HI	
	4109-BD-00400	HI	
	4109-BD-00500	HI	
	4109-BD-00800	HI	
	4109-BD-01000	HI	
	4109-BD-00700	HI	
	4109-BD-01100	HI	
	4109-BD-00900	HI	
	4109-BD-01200	HI	
	4109-00-00400	HI	
	4109-00-00200	HI	
	4109-00-00300	HI	
	4109-00-00302	HI	
	4109-AB-00700	HI	
	4108-D0-01004	M-1	
4108-D0-01001	HI		
4108-D0-00900	HI		
4108-D0-01003	M-1		
4108-D0-01002	M-1		
4117-00-00100	HI		
Scappoose Airport	4131-00-00600	PUA	<p>PUA – Public Use-Airport (City of Scappoose)</p> <ul style="list-style-type: none"> Provides appropriate locations to encourage and support the continued operations and vitality of the Scappoose Airport. Permitted uses include airport-related commercial, manufacturing, and recreational uses, as well as law enforcement and firefighting activities, and certain agricultural and forestry activities. Conditional uses include auto rental, cafeterias and restaurants, food carts, motels, and other commercial uses associated with public airports.
	3106-B0-01300	PUA	
	3106-B0-01400	PUA	
	3106-B0-01600	PUA	
	3106-00-00300	PUA	
	3106-C0-00800	PUA	
	3106-C0-00700	PUA	

Scappoose Bay Marine Park and Bayport RV & Campground	4117-00-00200	C-2	<p>C-2 – Marine Commercial (Columbia County)</p> <ul style="list-style-type: none"> Provides for a range of water-related activities both commercial and residential. Permitted uses include boat launch or moorage, houseboats, retail and dining, and public or private open spaces and parks. Conditional uses include single-family dwellings, utility facilities, and water-dependent construction activities.
	4117-00-01300	C-2	
	4117-00-01100	R-10	<p>R-10 – Single Family Residential (Columbia County):</p> <ul style="list-style-type: none"> Provides for low-density residential uses. Permitted uses include residential buildings and accessory structures. Conditional uses include home occupations and churches.

5.2 ECONOMIC AND COMMUNITY BENEFITS ANALYSIS

FCS Group analyzed the economic and community benefits of the Port and of Port-related businesses in 2023. An economic and fiscal impact analysis was conducted using analysis provided by the University of Oregon, using IMPLAN (Impact Analysis of Planning) model, and by FCS Group (using the Business Oregon Fiscal Impact Model for Oregon Ports). The results and overall findings are summarized below.

The economic analysis concluded that the annual economic impact of the Port of included the following benefits in 2021.

- There are approximately 27 separate business entities along with the Port that are directly responsible for 480 jobs (including full- and part-time workers).
- The spending of labor income and business operations (on supplies and services) from direct business spending supports an additional 949 jobs within the region.
- In total there are 1,429 jobs supported by Port-dependent businesses and related operations.
- Port-related businesses paid workers approximately \$65.9 million in labor income in 2021. With annual sales output of an estimated \$256.8 million.
- These businesses contributed nearly \$135.3 million in value added (gross domestic product) for Oregon and the nation.
- The taxable sales and related property and leasehold taxes paid by Port-related businesses generated an estimated \$17.9 million in state tax revenue and \$16.6 million in local tax revenue in 2021.

6.0 MARKET ANALYSIS AND OPPORTUNITIES

The following sections identify current demographic and economic conditions, future trends, and existing and emerging economic opportunities for the Port to pursue. The full market analysis is included in Appendix C.

6.1 ECONOMIC AND DEMOGRAPHIC OVERVIEW

The Port of Columbia County District is located within the greater Portland-Vancouver-Hillsboro OR-WA Metropolitan Statistical Area (Portland MSA), and most of the economic interaction between the Port of Columbia County and the larger region is

contained within the Portland MSA. The Portland MSA contains over 3.3 million residents, has a civilian labor force of 1.4 million, and generates an annual Gross Domestic Product (GDP) in excess of \$187 billion.

The U.S. and Oregon economy are still recovering from the national economic recession brought on by the global Covid-19 pandemic in 2020. According to the U.S. Bureau of Economic Analysis, current-dollar GDP in Oregon increased in 2022 at an annual rate of 9.9 percent; and increased at an annual rate of 9.8 percent in 2021, indicating moderate economic expansion. In the near term, U.S. GDP is expected to remain relatively flat over the next two years according to December 2022 projections by the Federal Reserve Bank. In Oregon, state economists are predicting a continued upturn in the short term, although the Oregon Office of Economic Analysis notes that record low unemployment is a major headwind that curtails business expansion.

6.1.1 Trade

The greater Portland-Vancouver region is one of four primary international trade gateways along the West Coast. A developing middle class within Asian and Middle Eastern economies will result in significant increases in demand for trade for international exports.

As global and state GDP rises and commodity trade increases, Oregon ports should benefit from increases in import and export activity. Oregon exports reached a record high of \$34.5 billion in 2022 (according to the most recent data by the U.S. International Trade Administration); up 15 percent from 2021. Oregon's leading trade partner is China, which imports 24.5 percent of Oregon exports. Other leading export destinations in decreasing order include Mexico, Canada, Malaysia, Ireland, Japan, South Korea, and Israel.

6.1.2 Population, Labor, and Income

According to the U.S. Census Bureau and Portland State Population Research Center, Columbia County reached a record-high population level in 2022 with 53,588 residents. From 2010 to 2022, Columbia County's average annual population growth rate (AAGR) was 0.7 percent, just below the statewide average (0.85 percent). The fastest growing jurisdictions within the county in terms of population included Scappoose (1.9 percent) and Clatskanie (1.8 percent). While most jurisdictions experienced a positive AAGR, Columbia City (-0.01 percent) and Rainier (-0.37 percent) experienced a negative AAGR between 2010 and 2022.

As population levels have increased, income levels within Columbia County have also been increasing since 2010. The median household income in Columbia County was approximately \$73,909 in 2021 compared to \$55,199 in 2010. In the same time period, per capita income in Columbia County grew by 2.9 percent annually from \$20,070 to \$27,449.

6.2 MARKET ANALYSIS

A market analysis was completed by the project team to identify existing and emerging economic opportunities for the Port of Columbia County. The Market Study completed

by FCS Group (Appendix C) evaluated current economic conditions and demographics and market data provided by local, state, and federal agencies. Findings from the analysis are used to support business plan recommendations designed to assist the Port and its partners with growth opportunities consistent with the Port’s Mission and Vision.

6.2.1 *Employment*

Employment growth has rebounded since the pandemic, exceeding pre-pandemic levels, with a total employment in Columbia County of 11,908 jobs in 2022. Total employment is estimated to include: 1,650 manufacturing jobs, 1,590 retail trade jobs, 1,490 education and health service jobs, and 1,350 leisure and hospitality jobs. According to the Oregon Employment Department (OED), at the end of 2022, Columbia County had 1,484 private employers (including non-profits) and 70 public employer entities (at separate locations).

The largest private employers within the Port of Columbia County District include Fred Meyer, Rightline Equipment, Pacific Stainless Products, Cardinal Services, Walmart, and Safeway Stores. Compared to 2007 levels, job growth has occurred broadly in the services sector followed by modest improvements in retail and slight decreases in industry and government.

In the future, the OED expects 12,540 jobs to be added within the region (including Benton, Clatsop, Columbia, Lincoln, and Tillamook Counties) over the next 10 years, equating to a 12 percent annual growth rate between 2021 and 2031. Job growth in Columbia County is expected to be between 3,751 and 11,479 jobs over the 2023-2043 timeframe. Employment sectors where the most job growth is expected to occur include industrial, retail trade, services, and government.

6.2.2 *Tourism*

Visitation and tourism play an increasingly important role in supporting the Columbia County economy. According to a tourism impact study prepared for the Oregon Tourism Commission, annual travel spending in Columbia County amounted to \$36.3 million in 2022, up from \$21.6 million in 2020. Total travel spending increased at an average (AAGR) of 2.2 percent in Columbia County between 2012-2022. In addition to the county’s many natural attractions, planned reconstruction and expansion activities at the Scappoose Bay Marina should help promote recreational activities for residents and visitors in the Port district.

6.2.3 *Target Market*

The team prepared a target industries analysis for the Port of Columbia County to identify existing and emerging key business sectors. “Employment clusters” are a primary force driving local economic prospects and often site selection decisions. Clusters of economic activity go well beyond mere concentrations of industry or employment types and they represent unique competitive market advantages. The analysis identified the following four classifications of business clusters:

- **Stars:** include businesses with high location-quotient (LQ) (propensity to locate in County) and higher than average projected growth rate compared to other locations in Oregon.

- **Opportunities:** include businesses with low LQ and high average growth rate (possible pent-up demand or competitive market disadvantage relative to other locations).
- **Mature:** include businesses with high LQ but lower than average growth rate.
- **Challenges:** include businesses with low LQ and lower than average growth rate.

Employment sectors in the “Stars” cluster include Leisure and Hospitality (e.g., hotels/motels and food services), other services (i.e., business to business supply chains), administrative and waste management services, construction materials manufacturing and services, and transportation and subregional warehousing. The recommended target industries for the Port or Columbia County should include, but not be limited to:

- Power and Energy Production
- Machinery and Transportation Product Manufacturing
- Building and Construction Materials Manufacturing
- Apparel, Footwear, and Textile Product Manufacturing
- Aeronautical and Aviation Products and Testing
- Marine Products and Testing
- Wood/Paper Products and Composite Materials Manufacturing

6.2.4 *Development Opportunities*

Several private and public facility investments in the Port district have occurred or been proposed in recent years. Examples of investments include site development at Port Westward for a clean fuels refinery, and improvement projects at Scappoose Bay Marina. The investments at Port Westward are currently pending approval of federal permits. Construction of the upland portion of the Scappoose Bay Marina Improvement Project and marina dredging are both planned for 2024.

Recent and ongoing investments highlight the Port’s existing portfolio of industrial sites, buildings, and facilities that support jobs and tourism and generate a significant share of the annual GDP produced in Columbia County. The Port has the ability to provide a mix of “development ready” medium and large industrial sites with transportation access to rail, barge, and highway facilities. To support future investments and job forecasts, Columbia County will need between 418 and 776 gross acres of buildable employment land to accommodate future demand over the next 20 years. This includes 93 to 137 acres of land for marine and energy use and 25 to 166 acres of land for commercial opportunities (e.g., office, lodging, and retail). A portion of the projected service and retail-related job growth could also be accommodated by redevelopment or adaptive reuse of existing buildings and sites, located in downtown St. Helens, Columbia City, Scappoose, Rainier, and Clatskanie.

7.0 STRATEGIC BUSINESS PLAN ELEMENTS

The state template identifies five elements that must be included in a local Oregon port strategic business plan. The following sections (7.1 to 7.5) identify the Port’s priorities, goals, and strategies related to capital improvements, management, finance, environment,

and marketing. These goals and strategies will help guide the Port's economic development activities over the 5- to 20-year planning horizon. Each section provides an overview of the element, Port-wide goals and strategies, and, where applicable, strategies specific to the locations of Port facilities.

7.1 CAPITAL IMPROVEMENT PLAN

The Port's capital improvement plan (CIP) identifies the highest priority capital improvement projects to encourage economic development opportunities and the continued success of Port operations and facilities. The CIP guides capital improvement priorities but does not oblige the Port to make improvements. Funding for capital improvements is often contingent on partnerships with local, state, or federal agencies and/or private entities. These capital improvement projects do not represent all projects pursued by the Port, but instead, the highest priority projects across all Port business lines. The estimated total cost of projects identified in the CIP is approximately \$63 million. Figure 13 shows the general breakdown of costs for each Port facility.

Goal 1: Develop and maintain a Capital Improvement Plan that lists projects and gives planning-level costs and estimates for capital projects.

Strategy 1.1: Develop a list of viable capital improvement projects for Port facilities, assets, and partnership projects with other agencies or property owners (see Table 2).

Strategy 1.2: Maintain and update the CIP on an annual or biannual basis, with input from partner agencies or property owners as appropriate.

Goal 2: Promote Port Westward as a prime industrial site capable of supporting energy and bulk commodities manufacture and trans-shipment, including rail and barge-to-ship transfers between inland ports and Pacific Rim destinations.

Strategy 2.1: Pursue rezoning of property to allow for industrial uses.

Strategy 2.2: Expand and improve dock capacity to increase Columbia River access by increasing dock capacity of the existing Beaver Dock to accommodate two 75,000 metric-ton laden vessels, adding a third berth, and repairing the downstream approach to the dock that was damaged in late 2023.

Strategy 2.3: Continue to work with PGE and other tenants and adjacent agricultural users to ensure a compatible mix of uses.

Goal 3: Maintain Scappoose Airport and Scappoose Bay Marina as key assets to meet market demand and improve revenue streams.

Strategy 3.1: Support improvements identified in Airport Master Plan to ensure full use of airport aircraft storage capacity.

Strategy 3.2: Complete Phase II marina improvements to improve river access.

Strategy 3.3: Budget for operations and maintenance by identifying projected cash requirements and funding sources.

Goal 4: Modernize and continue to develop existing Port assets that lead to economic resiliency and the Port’s capacity to carry out its mission of economic development.

Strategy 4.1: Encourage the investment of capital improvements that increase resiliency and capacity of existing infrastructure at industrial and business park properties.

7.1.1 Port Westward Site Development

The Port Commission identified development of projects at Port Westward as a key priority project for the Port. The Port has identified maintenance and expansion projects for the site, as included in the CIP (see Tables 2 and 3). Capital plans include increasing the dock capacity of the existing Beaver Dock to accommodate two 75,000 metric-ton laden vessels, adding a third berth, and repairing the downstream approach to the dock that was damaged in late 2023. Improvements also include connecting the fire system at the dock to the Port’s water system, expanding the water intake system, and seismic improvements. The Port has also identified completing the Hermo Road access at Port Westward, which would improve connectivity of the site.

Table 2. Capital Improvement Plan

Facility	Project	Description	Cost*	Target Start Year	End Year	Funding Source	Revenue Rating**	Priority	Service Life
Port Westward	Seismic Resiliency	Determine vulnerabilities per Oregon SB 1567.	\$ 50,000	2023	2024	Port	0	1	20
	Beaver Dock Down Stream Approach Replacement	Repair 130' gap in approach to dock caused by barge hitting approach damaging product pipelines, water lines, electrical conduits, piles, and decking. Focus on restoring product line, fire water, PGE water discharge.	\$ 3,000,000	2023	2024	Insurance	1	1	50
	Beaver Dock Expansion Berths 1 & 2	Upgrade berths 1 and 2 to accommodate up to Panamax-class liquid bulk vessels.	\$ 5,000,000	2024	2027	Port/grant funding	1	1	30
	Improve Fire System on Dock	Connect to port's water system and consider reestablishing looped system.	\$ 600,000	2024	2027	Port/grant funding	0	1	20
	Expand Water Intake System	Redesign water meters to provide accurate metering and expand system to accommodate future new user.	\$ 250,000	2025	2027	Tenant/Port	0	1	30
	Complete Hermo Road Access	Extend from Quincy Mayger Rd. to Port Access Rd.	TBD	2025	2028	Tenant/ Port	0	2	50
	Beaver Dock Expansion Berth 3	Add 3rd berth to accommodate Panamax-class liquid bulk vessels.	TBD	2029	2035	Port/tenants/grant funding	1	3	50
	Total Cost:			\$ 8,900,000					
Clatskanie Business Center	Sell/Demolition of Building	Preferred option is to sell.	\$ 1,000,000	2025	2030	Port/grant funding	-1	2	NA
	Total Cost			\$ 1,000,000					

Facility	Project	Description	Cost*	Target Start Year	End Year	Funding Source	Revenue Rating**	Priority	Service Life
Columbia City Industrial Park	Port Headquarters Office Expansion	Expand and remodel Port office building.	\$1,000,000	2026	2027	Port	-1	2	30
	Dock Operational Capacity Improvements	Design, engineering, permitting, and construction to add additional capacity.	\$ 2,000,000	TBD	TBD	Port/grant funding	-1	1	30
	Site Development/ Building Demolition	Site improvements including grading, utilities, building pad, and roads. Demo existing building/manufactured home.	\$ TBD	2029	2029	Port	-1	2	NA
	South Rail Spur Track Replacement/ Drainage Improvements	Replace south rail spur. Drainage work split out.	\$ 1,000,000	2026	2026	Port/grant funding	-1	3	100
	Total Cost		\$ 4,000,000						
McNulty Creek Industrial Park	Speculative Industrial Development – Design	82,000 SF speculative building and site improvements.	\$ 500,000	2026	2027	Port	-1	2	50
	Speculative Industrial Development – Construction	82,000 SF speculative building and site improvements.	\$ 8,200,000	2028	2030	Port	-1	2	50
	Total Cost		\$ 8,700,000						
Multnomah Industrial Park	Port Maintenance Shop Const.	New shop building including site improvements and utilities.	TBD	2025	2026	Port	-1	2	50
	DEQ Environmental Remediation	Site environmental remediation.	TBD	2026	2036	Port/grant funding	-1	3	100
	Site Development along Old Portland Rd.	New building and utilities on 2+ acres. Building size TBD.	TBD	2030	2036	Port	0	3	50
	Park Expansion	Expand the existing footprint of Multnomah Industrial Park.	\$ 1,000,000	2028	2030	Port	-1	3	NA
	Total Cost		\$ 1,000,000						

Facility	Project	Description	Cost*	Target Start Year	End Year	Funding Source	Revenue Rating**	Priority	Service Life
Railroad Corridor	DEQ Environmental Remediation	Remediation of creosote in upland and in-water areas.	\$ 23,000,000	2024	2124	Insurance/ Port/ grant funding	-1	1	100
	Site Access	Feasibility study for northern access road.	\$ 70,000	2028	2030	Port	-1	3	NA
	Total Cost		\$ 23,070,000						
Scappoose Airport	West Side Pavement Maintenance	Deferred pavement maintenance on taxiways, taxi lanes and aprons.	\$ 399,000	2025	2026	FAA/ Port	0	1	10
	Runway Rehabilitation Phase II Design	Design for resurfacing 510,000 SF of runway.	\$ 400,000	2025	2026	FAA/ Port	0	1	10
	Update Airport Master Plan	Update Scappoose Airport Master Plan.	\$ 250,000	2028	2029	FAA/ Port	0	1	10
	Emergency Generator System	Install emergency generator.	\$ 324,000	2024	2025	ODAV/ Port	-1	1	15
	Runway Rehabilitation Phase III Construct	Runway rehabilitation construction.	\$ 4,700,000	2026	2027	FAA/ ODAV/ Port	0	2	10
	East Side Hangar Demolition	Demo east side hangars.	\$ 100,000	2025	2026	Port	-1	2	NA
	East Side Hangar Replacement (E10 & E5) Design and Construction	Replace east side hangars.	\$ 750,000	2026	2027	Port	1	2	50
	East Side Waterline Extension	Extend water service to the east side of the airport.	\$ 450,000	2024	2025	FAA/ Port	-1	2	100
	Total Cost		\$ 7,373,000						

Facility	Project	Description	Cost*	Target Start Year	End Year	Funding Source	Revenue Rating**	Priority	Service Life
Scappoose Bay Marine Park	Maintenance Dredging (every 7-10 years)	Dredging at marina.	\$ 2,500,000	2024	2024	Grant funding/Port	-1	1	6
	Upland Marina Improvements	Parking lot improvements, kayak unloading area, additional ADA parking, get-ready platform with power and air compressor, and install 2nd pay station.	\$ 900,000	2024	2025	Grant funding/Port	-1	2	25
	In-Water Marina Improvements	In-water improvements include replace gangway and dock, add 6 paddle craft docks, replace boat ramp, and install ADA compliant kayak launch.	\$ 5,000,000	TBD	TBD	Grant funding/Port	-1	2	20
	Bayport RV Park Expansion	Expand RV Park to other side of creek.	\$ 1,000,000	TBD	TBD	Grant funding/Port	0	3	30
	Total Cost		\$ 9,400,000						
CIP Total Cost***		\$ 63,443,000							

* All costs are shown in 2023 dollars.

** Revenue Rating:

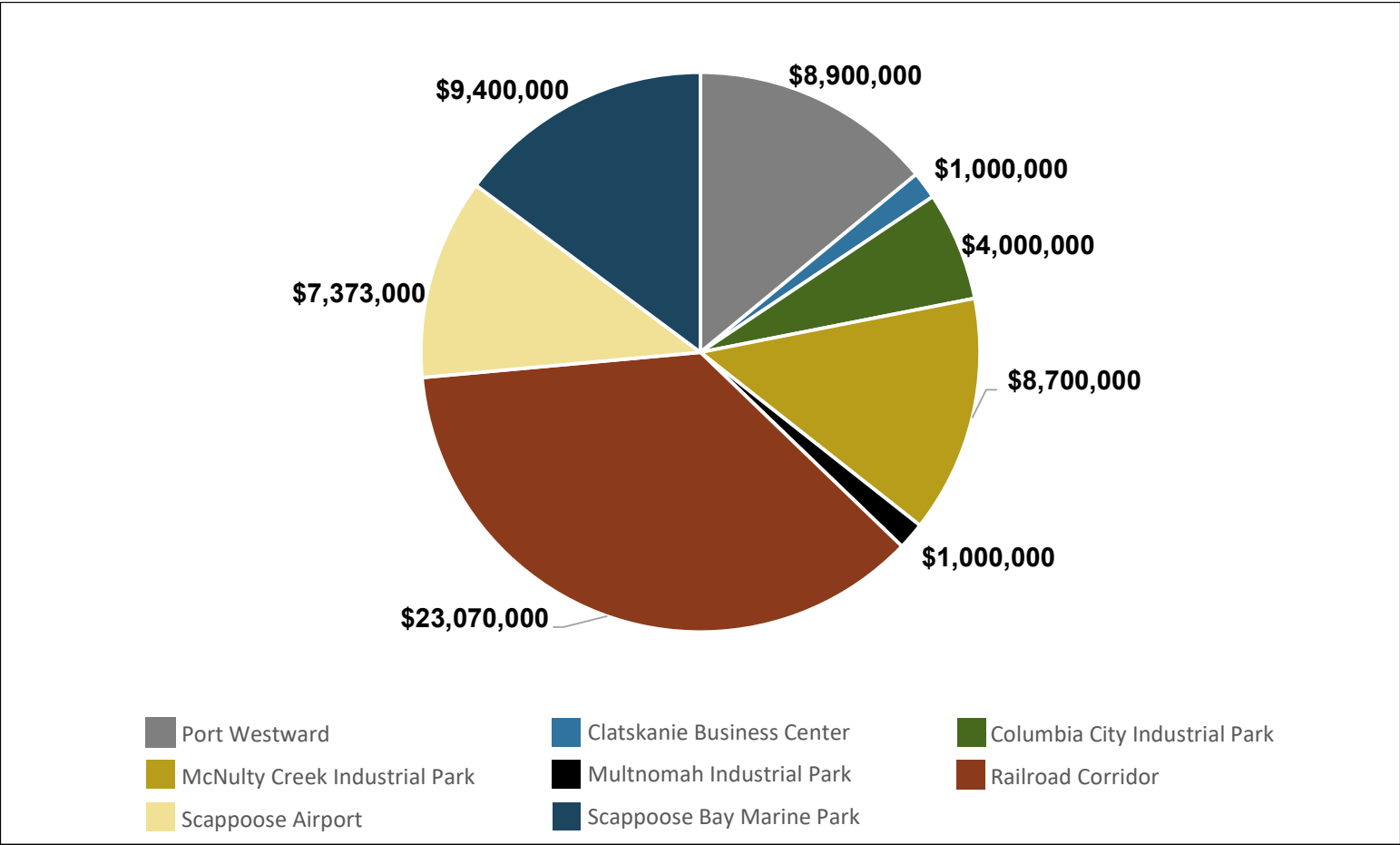
(-1) Requires Subsidy

(0) Generally Self-Supporting

(1) Generates Positive Cash Flow

*** CIP Total Cost does not include cost estimates for unpriced projects (marked TBD).

Figure 13. CIP Total Cost per Port Facility



7.2 MANAGEMENT PLAN

The following management and personnel goals and strategies aim to govern the management of the Port's facilities and assets while strengthening the effectiveness of its personnel and Port Commission.

Goal 1: Enhance the capacity of the professional staff and Port Commission.

Strategy 1.1: Facilitate regular joint staff and Commission training and workshop opportunities. Include appropriate budgets for periodic training opportunities to allow the Port Commissioners and staff to gain knowledge relevant to their positions.

Strategy 1.2: Encourage Port Commissioners and staff participation in professional organizations including the Pacific Northwest Waterways Association, Oregon Public Port Association, Association of Pacific Ports, Special District Association of Oregon, Columbia County Economic Team, and local chambers of commerce.

Strategy 1.3: Develop a staffing and Port Commission strategy and succession plan to account for turnover and future employment needs.

Goal 2: Integrate the Strategic Business Plan as a planning tool to help guide the Port.

Strategy 2.1: Adhere to and periodically update the strategic business plan to assess priorities and ensure long-term efficiency and financial sustainability.

Goal 3: Continue to foster strategic partnerships with local communities, agencies, Port tenants, and prospective businesses.

Strategy 3.1: Increase agency coordination with the state, Columbia County, jurisdictions within the Port district, and Columbia Economic Team for greater transparency between parties and to streamline permitting processes. Work with state and federal agencies to support access improvements for commerce and recreation.

Strategy 3.2: Pursue partnerships with prospective businesses to develop commercial and industrial uses that meet market demands and economic growth opportunities in the Port district.

Strategy 3.3: Increase engagement with local communities in north and south Columbia County to ensure their local economic development potential is realized.

7.3 FINANCIAL PLAN

The following goals and strategies are proposed to assist the Port in implementing sound financial management practices using consistent policy benchmarks and techniques. A summary of key recommended financial strategies follows, and the full financial plan is included in Appendix D.

Goal 1: Support the financial performance of the Port and Port business lines through regular monitoring and coordination.

Strategy 1.1: Maintain financial reserve policy target guidelines as approved by the Port.

Strategy 1.2: Maintain an operating reserve of at least 90 days to ensure operating revenues will cover project operating and maintenance expenditures.

Strategy 1.3: Prepare long-term capital projections, including cash-funded capital, available grant funding, existing debt service, and new debt obligations due to future borrowing. Prioritize capital projects based on public need, assessed need, government mandates, public safety, tenant/customer needs, and positive cashflow to the Port.

Strategy 1.4: Continue to revise and maintain fixed asset thresholds based on capital projects.

Strategy 1.5: Continue to develop an ongoing comprehensive financing plan for prudent utilization and leverage of the Port's assets and capacity.

Strategy 1.6: Provide for a diverse and stable stream of operating revenues generated through ongoing investment.

7.4 ENVIRONMENTAL PLAN

The following goals and strategies are proposed to assist the Port in maintaining its commitment to sound environmental stewardship.

Goal 1: Maintain compliance with all applicable environmental laws and regulations.

Strategy 1.1: Establish best management practices to ensure compliance with current environmental regulations. Promptly respond to any environmental incident that may occur.

Strategy 1.2: Develop and maintain collaborative working relationships with regulatory agencies.

Goal 2: Uphold environmental stewardship as the Port develops and manages its land and marine facilities.

Strategy 2.1: Be an active participant in membership organizations that advocate for environmental legislations that may affect Port properties and for effective and streamlined regulations.

Strategy 2.2: Work with local partners to identify Port participation in environmental enhancement projects that benefit the local environment.

Strategy 2.3: Implement climate action policies in everyday decision making and higher-level portfolio management and encourage tenants to implement their own climate action goals.

7.5 MARKETING PLAN

The following marketing goals and strategies are intended to assist the Port in pursuing new economic development opportunities while supporting and maintaining positive relationships with its current tenants.

Goal 1: Promote the Port of Columbia County and its diverse, well-served industrial sites, airport, and marina to potential local, regional, state, national, and international site users to attract and retain target industries through a marketing plan.

Strategy 1.1: Focus marketing for economic growth that would support family-wage jobs.

Strategy 1.2: Leverage the district's locational advantage along the Columbia River to focus marketing on tourism and recreational opportunities at the Scappoose Bay Marine Park and Bayport RV Park.

Goal 2: Develop plans for targeted economic growth and long-term financial sustainability.

Strategy 2.1: Target industries identified in the market analysis that support strong employment sectors that have a propensity to locate in the region.

Strategy 2.2: Continue to market the Scappoose Airport regionally and nationally.

Goal 3: Ensure that Port implements Diversity, Equity, and Inclusion (DEI) strategies and support tenants in implementing their own inclusive goals.

Strategy 3.1: Lead by example: seek diversity and equitable outcomes to provide inclusive opportunities for all district constituents and employees of the Port.

Strategy 3.2: Encourage Port tenants to practice DEI through development and lease agreement provisions that are mutually agreed and consistent with current law.

8.0 STRATEGIC PRIORITIES

Through Port commission meetings and the engagement process with Port staff, the Port has identified three strategic priorities that they will be pursuing in the future. The Port Commission is primarily focused on increasing available industrial land throughout the Port district and increasing development opportunities at Port Westward. The Port's top three strategic priorities for the future include:

- Invest in development and modernization of existing industrial land;
- Development of projects at Port Westward; and
- Purchase additional industrial property throughout the Port district.

9.0 ACTION PLAN

Table 3 provides an action plan that identifies the top Port priority projects, a timeline, and planned actions. The action plan will help to guide the Port as it implements the recommendations within this strategic business plan. Successful completion of the

planned capital, marketing, and maintenance projects will require ongoing review and updates. This action plan should be reviewed annually in conjunction with the Port’s budget annual review and may be updated as needed. Dates are dependent on budget and other external factors.

Table 3. Action Plan

Project	Term	Cost Est.	Priority	Next Steps
Port Westward Industrial Park Beaver Dock Down Stream Approach Replacement	Short Term (yrs 1-5)	\$3,000,000	1	<ul style="list-style-type: none"> Port Lead with Users Repair product pipelines, fire water lines, and PGE water discharge line Coordinate with insurance for funding
Port Westward Industrial Park Seismic Resiliency	Short Term (yrs 1-5)	\$50,000	1	<ul style="list-style-type: none"> Port Lead with Users Work with contract engineer to complete study
Port Westward Industrial Park Beaver Dock Expansion Berths 1 & 2	Short Term (yrs 1-5)	\$5,000,000	1	<ul style="list-style-type: none"> Port Lead Design, engineering and permitting Seek funding
Port Westward Industrial Park Improve Beaver Dock Fire System	Short Term (yrs 1-5)	\$600,000	1	<ul style="list-style-type: none"> Port Lead
Port Westward Industrial Park Expand Water Intake System	Short Term (yrs 1-5)	\$250,000	1	<ul style="list-style-type: none"> Port Lead Design and permitting
Scappoose Airport Emergency Generator System	Short Term (yrs 1-5)	\$324,000	1	<ul style="list-style-type: none"> Port Lead with FAA Order generator and install
Scappoose Airport West Side Pavement Maintenance	Short Term (yrs 1-5)	\$399,000	1	<ul style="list-style-type: none"> Port Lead with FAA Design and bid repaving contract
Scappoose Airport Runway Rehabilitation Project	Short Term (yrs 1-5)	\$5,100,000	1	<ul style="list-style-type: none"> Port Lead with FAA \$400,000 for design Bid repaving contract \$4,700,000 for construction
Scappoose Airport Update Airport Master Plan	Short Term (yrs 1-5)	\$250,000	1	<ul style="list-style-type: none"> Port Lead with FAA
Scappoose Bay Marine Park Marina Maintenance Dredging (every 7-10 years)	Short – Long Term (yrs 1-10+)	\$2,500,000	1	<ul style="list-style-type: none"> Port Lead Bid for 2024 dredging contract
Railroad Avenue DEQ Environmental Remediation	Short – Long Term (yrs 1-20)	\$23,000,000	1	<ul style="list-style-type: none"> Port Lead with DEQ Seek funding for remediation
Columbia City Industrial Park Dock Operational Capacity Improvements	Short Term (yrs 1-5)	\$2,000,000	1	<ul style="list-style-type: none"> Port Lead Structural assessment Design, engineering and permitting
Multnomah Industrial Park Port Maintenance Shop	Short Term (yrs 1-5)	TBD	2	<ul style="list-style-type: none"> Port Lead Construct new shop building
Port Westward Industrial Park Complete Hermo Road Access	Short Term (yrs 1-5)	TBD	2	<ul style="list-style-type: none"> County Lead with Users Design and permitting

Columbia City Industrial Park Port Headquarters Office Expansion	Short Term (yrs 1-5)	\$1,000,000	2	<ul style="list-style-type: none"> • Port Lead • Contract for construction
McNulty Industrial Park 82,000 SF Speculative Industrial Building	Short Term (yrs 1-5)	\$8,700,000	2	<ul style="list-style-type: none"> • Port Lead • \$500,000 for site improvements • \$8,200,000 for construction
Scappoose Airport East Side Hangar Demolition & Replacement (E10 and E5)	Short Term (yrs 1-5)	\$850,000	2	<ul style="list-style-type: none"> • Port Lead • \$100,000 for demo of eastside hangars • \$750,000 for design, permit, and construction of new hangars
Scappoose Airport East Side Waterline Extension	Short Term (yrs 1-5)	\$450,000	2	<ul style="list-style-type: none"> • Port Lead with County • Coordinate with County on access to eastside waterline
Scappoose Bay Marine Park Upland Marina Improvements	Short Term (yrs 1-5)	\$900,000	2	<ul style="list-style-type: none"> • Port Lead • Bid for construction contract
Scappoose Bay Marine Park In-Water Marina Improvements	Short – Mid Term (yrs 1-10)	\$5,000,000	2	<ul style="list-style-type: none"> • Port Lead • Seek funding for construction
Clatskanie Business Center Sell/Demo Building	Short – Mid Term (yrs 1-10)	\$1,000,000	2	<ul style="list-style-type: none"> • Port Lead
Columbia City Industrial Park South Rail Spur Track Replacement and Drainage Improvements	Short Term (yrs 1-5)	\$1,000,000	3	<ul style="list-style-type: none"> • Port Lead • Complete site assessment • Design, engineering, and permitting
Multnomah Industrial Park DEQ Environmental Remediation	Short – Long Term (yrs 1-20)	TBD	3	<ul style="list-style-type: none"> • Port Lead with DEQ • Seek funding for remediation
Columbia City Industrial Park Site Development / Building Demolition	Mid Term (yrs 5-10)	TBD	3	<ul style="list-style-type: none"> • Port Lead • Site assessment • Design, engineering and permitting for site redevelopment • \$75,000 for building demo
Multnomah Industrial Park Park Expansion	Mid Term (5-10 yrs)	\$1,000,000	3	<ul style="list-style-type: none"> • Port Lead • Design, engineering and permitting for site redevelopment
Railroad Avenue Northern Site Access Road	Mid Term (5-10 yrs)	\$70,000	3	<ul style="list-style-type: none"> • Port Lead with City of St. Helens • Complete access feasibility study
Port Westward Industrial Park Beaver Dock Expansion Berth 3	Mid Term (yrs 5-10)	TBD	3	<ul style="list-style-type: none"> • Port Lead • Design, engineering and permitting
Scappoose Bay Marine Park Bayport RV Park Expansion	Mid Term (yrs 5-10)	\$1,000,000	3	<ul style="list-style-type: none"> • Port Lead • Environmental feasibility study
Multnomah Industrial Park Site Development along Old Portland Road	Long Term (10+ yrs)	TBD	3	<ul style="list-style-type: none"> • Port Lead • Site assessment • Design, engineering and permitting for site redevelopment / utilities

10.0 LIST OF ACRONYMS AND ABBREVIATIONS

AAGR	Average Annual Population Growth Rate
BMP	Best Management Practice
CIP	Capital Improvement Plan
County	Columbia County
CPI	Consumer Price Index
DEQ	Oregon Department of Environmental Quality
DLCD	Oregon Department of Land Conservation and Development
DOGAMI	Oregon Department of Geology and Mineral Industries
DSCR	Debt Service Coverage Ratio
EOA	Economic Opportunities Analysis
FAA	Federal Aviation Administration
FP	Financial Policies
GDP	Gross Domestic Product
IFA	Oregon Infrastructure Finance Authority
OAR	Oregon Administrative Rules
OED	Oregon Employment Department
ODAV	Oregon Department of Aviation
ODFW	Oregon Department of Fish and Wildlife
ODOT	Oregon Department of Transportation
ORS	Oregon Revised Statutes
OMIC	Oregon Manufacturing Innovation Center
OPRD	Oregon Parks and Recreation Department
OSMB	Oregon State Marine Board
MPO	Metropolitan Planning Organization
MSA	Metropolitan Statistical Area
mt	Metric Ton
NPDES	National Pollutant Discharge Elimination System
plan, the	2024 Strategic Business Plan
Port	Port of Columbia County
PUD	Public Utility District
PWR	Portland & Western Railroad
PGE	Portland General Electric
SDAO	Special District Association of Oregon
SWOT	Strengths, Weaknesses, Opportunities, and Threats Analysis
TSP	Transportation System Plan
UGB	Urban Growth Boundary
USACE	US Army Corps of Engineers
USDOT	United States Department of Transportation
WRD	Oregon Water Resources

PORT OF COLUMBIA COUNTY 2024 STRATEGIC BUSINESS PLAN UPDATE

APPENDIX A

Commissioner, Stakeholder, and Public Outreach Summary

DRAFT



Port of Columbia County

Strategic Business Plan (SBP) Update Kickoff Meeting and Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis

August 9, 2023

MEETING OVERVIEW

As part of the kickoff meeting for the Port's strategic business planning update process, the project team from WSP USA (WSP), FCS Group, and Lower Columbia Engineering, met with Port of Columbia County (Port) staff to discuss Port accomplishments, followed by a public meeting with Port Commissioners and staff to facilitate a SWOT analysis. Commission members, staff, and consultant attendees are listed below, followed by a summary of the SWOT analysis.

Port of Columbia County Commissioners

Robert Keyser, Commissioner
Brian Fawcett, Commissioner
Nancy Ward, Commissioner (virtual)
Nick Sorber, Commissioner
Chip Bubl, Commissioner

State of Oregon Infrastructure Finance Authority

Becky Bryant, Regional Project Manager

Port of Columbia County Staff

Sean Clark, Executive Director
Gina Sisco, Communications and External Affairs Manager
Amy Bynum, Deputy Executive Director
Elliot Levin, North County Operations and Terminal Manager
Guy Glenn, Executive Finance Manager
Bob Salisbury, Port General Counsel
Miriam House, Operations Manager
Lacey Tolles, Data Resources and Project Specialist

Consultants

Scott Keillor, WSP, Project Manager
Emma Johnson, WSP
Jodi Mescher, WSP
Sean McElroy, WSP (virtual)
Doug De Vries, WSP (virtual)
Mary Soltani, WSP (virtual)
Chase Berg, Lower Columbia Engineering
Tim Wood, FCS GROUP (virtual)

PORT ACCOMPLISHMENTS 2012 – 2023

Sean Clark, Executive Director, reviewed the Port's accomplishment since the Port adopted its Strategic Business Plan (SBP) in 2012. The 2012 SBP created a list of priority projects at a 2012 value of \$25 million. Priority projects were identified based on public input, infrastructure investments, and market conditions at the time. The Port has eclipsed its current Capital Improvement Plan (CIP) target, completing \$40 million in capital projects in the district since the original SBP of 2012 identified \$25 million in Port investment needs.

Scott Keillor asked Port staff what a successful SBP would look like. Staff agreed that activating assets, increasing profits, and analyzing how each real estate component is operating sustainably is important for success. Additionally, diversity, equity, and inclusion (DEI) is important to guide future work with broad input from key stakeholders and strategic partners. Staff shared that the Port Commissioners compiled a preliminary list of priority projects, including maintenance of the dock at Port Westward along with development plans for industrial park sites and buildings, and exploring how to make the marina and airport more profitable or break even.

Staff commented that measures of success for the SBP update include:

- Create a road map of maintenance, development, and acquisition priorities for the next 5 to 10 years
- Identify future grant funding opportunities
- Accomplish the projects listed as priorities in the SBP
- Integrate with other local planning efforts
- Include DEI and climate priorities
- Increase the Port's understanding of its assets and how to maximize growth potential
- Review, update, and refer to SBP periodically to effectively implement SBP policies
- View priority projects with an understanding and lens of staff and resource limitations to scale appropriate projects
- Written in plain and accessible language so that future generations can understand the intent and meaning

SWOT ANALYSIS

Strengths

Strengths are considered assets that the Port can build upon. All agreed that the Port of Columbia County is well positioned to capitalize on its strengths and has high potential for growth. The Port has a diverse portfolio of facilities that increases potential for commerce. Port facilities, especially the Scappoose Airport, industrial parks, and Port Westward, contribute greatly to the Port's overall assets. Additionally, the Scappoose Bay Marina contributes to the local economy by bringing people into the community for tourism and recreation. The Port district is land-rich and has a deep-water port available to sustain commerce along the Columbia River. Port Commissioners noted that the Port staff are a critical asset to the Port's resources. Staff and Commission have established strategic partnerships and become involved with associations to strengthen regional collaboration and ensure that Port planning is in alignment with local city and regional policies. The Port benefits from maritime commerce on the Columbia River which offers competitive access to the Pacific Rim and global markets. Additionally, the Port is well positioned to contribute to Portland-area markets through access to Highway 30 connecting to I-5, and the barge-to-rail connection. In addition to the Port's assets and locational strengths, the Commission recognized the importance of community resources, including a high quality of life, proximity to Portland metro area without urban congestion, and the contributions of the Oregon Manufacturing Innovation Center (OMIC) and Portland Community College OMIC Training Center to strengthen the local workforce.

Weaknesses

Weaknesses can be seen as areas to target for improvements by the Port and other regional partners. While the Port benefits from a diverse portfolio, it also struggles with the diversity as resources are pulled in different directions. The unique layout of a 50-mile-long district creates challenges for cohesion within the district, which is often referred to as either north or south county. Port staff is limited on time and resources and must understand city level policies across the five communities within the district. Additionally, the Port's office has limited space which creates challenges for productivity and occasionally limits opportunities for public engagement and business development. The overall business environment in Oregon is a noted weakness because permitting, regulations, taxes, and bureaucracy create barriers for business and industrial tenants. The Commission noted that technology adaptation and data organization has been slow to be incorporated in the district. While locational advantages to different markets exist, compared to their competition, the Port has a somewhat limited or underdeveloped access to I-5, the river, and rail. For example, the district is further down river than other competitive markets which may limit barge growth potential. The Commission also agreed that there are several aspects of the community that create barriers to growth for the Port. There is a lack of resources to support the workforce, including workforce and affordable housing, temporary housing, childcare options and sufficient school support, and public transportation.

Opportunities

Opportunities are favorable conditions or possibilities that can be invested in to grow business at the Port of Columbia County and its community. Despite current challenges and future threats, the Port sees a variety of opportunities to improve economic development for the district. The Port sees

several opportunities to improve or expand existing facilities, notably the shovel-ready property at McNulty Creek Industrial Park, the available corporate airport hangars, and expansion opportunities of the Bayport RV Park and at the Multnomah Industrial Park. The Port also understands there is available industrial land outside the existing portfolio which could serve future business opportunities. The Port should have continuous capital improvement prioritization, and the SBP should help to create the roadmap for prioritization. The Port has an opportunity to develop existing facilities by improving site-specific plans to have more influence on the variety of businesses in the district. Port staff and Commission both identified areas for improvements for business activity, value added agriculture industry, increasing in-house technology automation, and leveraging the Scappoose Airport's reputation within the airport community. Other areas with improvement potential include broadband fiber optics and cellular data. Also noted as a strength, OMIC serves as an important community resource for training and supporting the local workforce.

Threats

Threats can be internal or external negative forces that the Port may or may not be able to control that could create future barriers to business activity. The Commission noted that some of the Port's facilities are faced with aging infrastructure, especially existing docks. There are also rising security concerns at Port facilities. While the Port benefits from locational factors, these strengths are shared by the competition, particularly the Ports of Kalama, Longview, and Astoria. The business environment poses a threat to the Port as they must deal with supply-chain issues and inflation. Additionally, data management and cyber security pose a threat to Port operations. Commissioners noted that the Port is not immune to the impacts of climate change, unstable resources, and overall fragile finances within the community.

SWOT Analysis Matrix

The following table provides an overview of the Port of Columbia County SWOT analysis.

Strengths	Weaknesses
<p>Port Facilities</p> <ul style="list-style-type: none"> • Diverse portfolio of facilities increases potential for commerce • The Scappoose Bay Marina and RV park bring in tourism • Scappoose Airport • Industrial Parks • Port Westward deep-water terminal • Affordable and clean power availability • Land-rich district • Available docks to serve barges at Columbia City Industrial Park 	<p>Port Facilities</p> <ul style="list-style-type: none"> • Diverse portfolio pulls resources in different directions • Ability to address varied needs of its 50-mile-long, five city district • Clatskanie Business Park is outdated and in need of maintenance
<p>Business Resources</p> <ul style="list-style-type: none"> • Port staff • Strategic partnerships and associations • Port planning is in alignment with local city and regional economic development policies 	<p>Business Resources</p> <ul style="list-style-type: none"> • Limited staff time and resources • Limited Port office space • Technology adaptation and data organization • Business environment in Oregon
<p>Access</p> <ul style="list-style-type: none"> • Maritime commerce on the Columbia River • Pacific Rim and global markets • Close proximity to I-5 for part of the Port district • Barge-to-rail connection • Access to Portland area without added urban congestion allows quicker transport 	<p>Access</p> <ul style="list-style-type: none"> • Limited access to I-5 and rail relative to competition • I-5 to rail connection is limited • The district is located further down river from deep-water ports
<p>Community Resources</p> <ul style="list-style-type: none"> • High quality of life in Columbia County • OMIC and PCC to strengthen the workforce • Regional grant funding received to continue housing work 	<p>Community Resources</p> <ul style="list-style-type: none"> • Underfunded and outdated public schools • Community opposition to rail • Lack of public transportation • Lack of workforce and affordable housing • Lack of childcare options to support workforce • Lack of temporary housing for construction projects • Community opposition to growth • Gaps in leisure and entertainment for business prospects

Opportunities	Threats
<p>Port Facilities</p> <ul style="list-style-type: none"> • Available airport hangars • Create road access from Railroad Avenue no further action property to adjacent City of St. Helens property • Shovel-ready property at McNulty Creek Industrial Park • Opportunity to expand Scappoose Bay Marina and Bayport RV Park • Site-specific planning • Railroad Corridor industrial land • Expansion of Multnomah Industrial Park • Building speculative buildings • Available industrial land outside Port’s portfolio (e.g., Columbia Commerce Center) • Suitable agricultural land • Port Westward and NEXT Renewable Fuels project development 	<p>Port Facilities</p> <ul style="list-style-type: none"> • Aging infrastructure, especially existing docks • Increased security concerns at Port facilities • Building speculative buildings without a tenant identified • Airport maintenance costs • Marina maintenance and dredging costs
<p>Business Resources</p> <ul style="list-style-type: none"> • Strong fixed base operator (FBO) reputation within the airport community • Technology automation to relieve staff time and resources • Increased Staff and Commission retreats to coordinate training and advance work efforts • State and Federal infrastructure funds available • Possibility of levying a tax in the future if needed 	<p>Business Resources</p> <ul style="list-style-type: none"> • Competition with nearby Ports, especially Kalama, Longview, and Astoria • Inflation • Supply-chain issues limit business activity • Data management and cyber-security threats to Port operations
<p>Community Resources</p> <ul style="list-style-type: none"> • Expand broadband for community access • Maintaining the quality of life is important to the community • Room for improvements with fiber optics and cellular data access 	<p>Community Resources</p> <ul style="list-style-type: none"> • Climate change • Fragile finances

NEXT STEPS

The consultant team conducted several stakeholder interviews following the SWOT session and set up several future interviews via phone and teams. In total, the team will complete a series of 8 stakeholder interviews with individuals identified by the Port. The findings from those interviews will be summarized in a composite summary and included in the community outreach report as an appendix to the SBP.

The consultant team will assemble a request for the Port to provide background data to help inform the strategic business plan update. The Port will schedule and host a site tour of Port facilities including a WSP engineer. In addition, our economists will undertake a market assessment. The resulting facilities and market assessments, along with the stakeholder interview summary will form the basis for the first two public open houses to be scheduled in October 2023 in both north and south county locations to engage with the community and identify key issues to consider for the SBP update. A Port Commission briefing will occur after the open houses, to include the same information plus a summary of public input gathered at the open houses.



Memorandum

Date: September 27, 2023

Subject: Port of Columbia County Strategic Business Plan Update
Stakeholder Interviews Summary
Project Number 316000674

From: Scott Keillor, Project Manager
Jodi Mescher, Planner

To: Gina Sisco, Port of Columbia County

The Port of Columbia County (Port) is initiating its 2023 Strategic Business Plan (SBP) update. This plan will meet the requirements for port planning under Oregon's statewide port plan, including key sections on management, capital facilities, finance, environment, and marketing. The study will consider Port operations, projects, and policies. SBPs must be updated every five years and fully revised every ten years for ports to remain eligible for state port planning and marketing funds.

To solicit input on the SBP update, WSP conducted eight stakeholder interviews in early August 2023 coinciding with the project kick-off. Interviews were conducted as informal conversations intended to understand individual and organizational perspectives. At the beginning of each interview, stakeholders were provided with a brief introduction, including general background information about the SBP update. Following the introduction, discussion topics generally covered the following.

- The Port and its partners
- The Port's primary mission
- Port District and Columbia County's greatest assets
- Port District and Columbia County's greatest weaknesses
- Opportunities for investments
- Key industries to focus on marketing
- Port operations
- Development opportunities at existing facilities
- Strategic priorities

The following is a summary of the input received, organized around the topics identified above. Candid responses were encouraged, and comments are not attributed to specific individuals to provide a level of anonymity. A list of stakeholders interviewed is included at the end of the summary.

The Port and its partners

The stakeholders interviewed had a wide variety of backgrounds and perspectives regarding the Port, Columbia County, and the economy at large. Several of the stakeholders represent local and regional public agencies with working relationships with the Port, and others have either had business operations at the Port previously or are currently business partners of the Port in other industries. Several stakeholders commented on the overall importance of the Port to the regional economy.

The Port's mission

Stakeholders agreed that the Port's primary mission and role is to serve as a regional economic development agency. The Port should primarily be involved in supporting existing businesses and bringing in new businesses to the Port district that support the economy and create jobs for the local workforce. Stakeholders generally expressed that the Port is currently on track for fulfilling its mission for economic development.

There was an apparent point of disagreement between stakeholders regarding the level of responsibility the Port has for considering diversity, equity, and inclusion (DEI) and climate action initiatives in the district. Some stakeholders commented that the Port should be responsible for DEI, adding that the Port has a role in the community as well as in the economic environment. Additionally, these stakeholders commented that the Port should be pro-active with climate initiatives and should focus on supporting sustainable industries. A few stakeholders also commented that DEI and climate initiatives could help position the Port for future grant funding. On the contrary, some stakeholders shared that both DEI and climate action initiatives are outside of the Port's scope. The Port should not be selective about businesses they target because that is counterintuitive to the business-friendly and free market climate the Port should strive for. One stakeholder even expressed concern that, while the current direction is on track for economic development, increasing public pressure to consider climate initiatives could detract from business opportunity in the future. Another stakeholder commented that the Port has been successful in meeting DEI and climate priorities required for state and federal funding, but they shouldn't be prioritizing these initiatives beyond the current baseline.

Port District and Columbia County's greatest assets

Key assets were commonly identified through interviews with the stakeholders. Foremost among these was the quality of life in Columbia County. Stakeholders agreed that Columbia County offers a high quality of life and access to services without the added congestion of more populous urban centers. Additionally, the natural capital in the area is an important asset to the county. Stakeholders identified that the Oregon Manufacturing Innovation Center (OMIC) is valuable to the district to support the local workforce and provide training opportunities. A few stakeholders mentioned that the district benefits from a business-friendly environment in the County. The Port can leverage this supportive business environment to bring in new tenants and support existing tenants.

Stakeholders also agreed that an important asset to the district and county is its many locational advantages. Columbia County benefits from its proximity to I-5, the Columbia River, and easy access to global markets. The Port district is along the supply chain route and has heavy freight travel, especially along Hwy 30, which is an economic driver for the area. The Port has been successful in diversifying their portfolio and the existing Port facilities are important assets. Additional assets to support economic development include relatively cheap industrial land in Columbia County as well as access to energy resources to support industry.

Port District and Columbia County's greatest weaknesses

Stakeholders identified several missing goods and services in the district that limit development potential in the region. Most stakeholders discussed weaknesses that they saw across the county in general rather than specific to the Port's existing policies or facilities. However, one notable weakness within the Port District is the ability for tenants to find appropriate facilities. One stakeholder suggested that the Port should improve their support of existing tenants to encourage growth and potential movement into larger vacant spaces.

The most prominent weakness noted by nearly all stakeholders was the lack of housing in the county. Although not unique to the area, the lack of housing creates a barrier to community growth and is especially challenging for the local workforce and prospective businesses. Similarly, some stakeholders noted that there is a lack of hospitality and food service in the county, which leads to many people commuting to Portland and may deter prospective businesses. While some stakeholders value the rural environment and high quality of life, others felt that this lack of convenience and access to stores is a challenge for the economy. Some stakeholders shared that, although OMIC is an important asset for the area, workforce development opportunities are limited which creates a barrier to business growth in general.

Most needed developments and investments

Stakeholders interviewed were asked to comment on where the Port should invest for future growth, and they shared a variety of priorities for investments. Stakeholders commented that the Port should continue to invest in Port Westward to ensure the development potential at that facility is realized. Some stakeholders said that the Port should invest in important transportation infrastructure in the district so that freight, shipping, barges, and vehicle traffic can flow simultaneously. The Port is well positioned to leverage the district's locational advantages, and investing in improvements to infrastructure will increase access to markets and help drive the local economy. One stakeholder commented that the Port should invest in a barge feeder service to increase short-term shipping opportunities. In addition to transportation infrastructure, some stakeholders said that the Port should invest in systems that create appealing opportunities and developments for prospective tenants. The Port should improve sewer and water systems to develop more shovel-ready properties. A few stakeholders said that the Port should invest in short-term speculative buildings to have available for tenants.

A few stakeholders noted that, while Rainier is within the Port's district, the Port does not have any existing facilities there. Stakeholders said that there is suitable land for industrial growth in Rainier that the Port should consider for future acquisition and development. Additionally, one stakeholder suggested adding a marine terminal with rail, road, and interstate access at Rainier.

Key industries to focus on marketing

Stakeholders discussed the primary industry types the Port should focus on for marketing the Columbia County area. Similar to the apparent tension between stakeholders in understanding the Port's role and mission, there was an apparent disagreement in which industries the Port should focus on. A few stakeholders shared that the Port should not be "too choosy" in which industries they are bringing into the district because they should only be prioritizing business growth. Innovation that is compatible with the region should be encouraged and focusing on specific industries could be bad for business and the economy at-large. Some stakeholders commented that the Port should focus on marketing for economic growth that would support family-wage jobs, regardless of the actual industry. One stakeholder added that the Port should consider appropriately scaled industries that can continue to the district's business environment.

However, some stakeholders had specific industries in mind to focus on for marketing and future growth. Some said that the Port should focus their marketing efforts on manufacturing because manufacturing fits within the existing business climate, can make use of available land and resources, and would create appropriate job opportunities. One stakeholder commented that the Port should leverage its locational advantage along the Columbia River to focus marketing on the blue economy and maritime industries. A few stakeholders also suggested that the Port increase marketing for tourism-based industries, although one stakeholder shared that tourism and recreation is not a strong opportunity for the region.

Development opportunities at existing facilities

Stakeholders suggested various types of developments that they would like to see at the Port's existing facilities. Echoing a recurring theme, some stakeholders commented that the Port should be open to whatever development makes sense for business at each facility while other stakeholders had specific developments to suggest for each facility, as summarized below.

Columbia City Industrial Park: This facility is well positioned to serve maritime industries, although the existing dock structure needs improvements. There is also an opportunity for this facility to support technology training.

McNulty Creek Industrial Park: The industrial park is well-positioned to support manufacturing developments. The Port could be more proactive about finding a tenant to fill the available space.

Multnomah Industrial Park: Stakeholders did not comment on specific types of development.

Port Westward Industrial Park: NEXT Renewable Fuels is an important development for the region; as that development is realized, this facility would serve as an energy hub. There is also

land available to support big industrial manufacturing (i.e., 200 to 400 jobs) in addition to NEXT Renewable Fuels.

Railroad Corridor: The Port should invest in site clean-up requirements to position the facility for marina and boat launch developments. Potential for recreational and tourism industries. Available acreage could be developed by advanced manufacturing or maintained for natural resources.

Clatskanie Business Center: There is an opportunity to revamp the existing facility to make the building more useful. It could serve as a business incubator for the local market, and has potential to support agriculture technology. However, some felt the building condition makes investing in it questionable.

Scappoose Airport: The Port should continue to make use of the airport and create strategic private-public partnerships to stimulate available hangar space. One stakeholder suggested exploring aerospace textiles as a potential development at the airport.

Port operations and policies

Stakeholders offered suggestions for Port operation and policy directives. A few stakeholders suggested that the Port reestablish the tax base, noting that there would be negligible impacts to the public and it would allow for investments. One stakeholder added that the Port should increase outreach efforts within the community, especially with the business community, to build awareness of the Port's work. A stakeholder suggested considering expanding the Port's boundaries to include the Vernonia Municipal Airport. A stakeholder commented that there appears to be a lack of urgency by the Port to develop available properties and facilities. Another stakeholder commented that staff consistency has been a challenge for Port operations and suggested that the Port would benefit from having more direction and a clear consensus around top priorities.

Stakeholders also commented on the importance of continuing partnerships with other agencies, organizations, and business leaders. Stakeholders recognized the challenge of doing business in Oregon and suggested that the Port can improve its internal processes to remove permitting and bureaucratic burdens which are often time-consuming. One stakeholder suggested bringing on an outside permitting specialist to support staff and improve operations. Additionally, one stakeholder suggested bringing on an engineer to assess Port buildings to ensure they are adequate to support the tenants' needs.

Strategic priorities

Stakeholders identified their top three strategic projects and initiatives for the Port to consider. Stakeholders identified a variety of initiatives and almost no stakeholders agreed on their top three priorities. Strategic priorities include:

- Focus on the developable land pipeline by finding tenants to lease available properties, developing available Port-owned land into shovel-ready properties, and identifying new land to acquire for future shovel-ready developments.
- Continue to work towards development of NEXT Renewable Fuels.
- Invest in transportation improvements to improve access to markets.
- Invest in maritime infrastructure.
- Work with local partners to encourage housing and workforce development initiatives in the county. Additionally, work with local partners to incentivize hotels, entertainment, and other community amenities.
- Leverage existing facilities by developing a speculative building at McNulty Creek Industrial Park, developing a covered space for flexible industrial opportunities, and expanding on airport development potential.
- Fulfill Through-the-Fence Access agreement at the Scappoose Airport and fill vacant hangar space.
- Diversify the Port's portfolio by investing in the hydrogen economy, investing in the tech sector, and leveraging available natural resources for tech (i.e., rock, water), marketing for new industrial jobs, and purchasing maritime industrial property in Rainier.
- Engage with businesses and the regional community to increase awareness of the Port's scope of work and to build public support for necessary financial investments and reinstating the tax base.

Stakeholders interviewed

Individuals who participated in the stakeholder interviews are identified below. Stakeholder affiliation is also noted; however, the opinions given were those of the individual stakeholder and do not necessarily represent the organizations identified.

Rachael Barry (Government Affairs Specialist, City of St. Helens)
Casey Garrett (County Commissioner, Columbia County)
Greg Hinkleman (City Manager, City of Clatskanie)
Scott Jorgensen (City Administrator, City of Rainier)
Kim Karber (Interim City Administrator, City of Columbia City)
Paul Langner (former Marine Facilities Manager, Teevin Bros.)
Melanie Olson (Regional Development Officer, Business Oregon)
Paul Vogel (Executive Director, Columbia Economic Team)

JM:sk



Memorandum

Date: October 27, 2023

Subject: Open House – Series #1 Summary

From: Jodi Mescher, WSP

To: Gina Sisco, Port of Columbia County

OVERVIEW

The Port of Columbia County (Port), along with the consultant team, hosted two open houses on October 18, 2023, to gather community input on existing conditions in the Port district to guide the Strategic Business Plan (Plan) update. Open houses were hosted in Rainier and St. Helens to reach community members in both north and south county.

The project team engaged with approximately 10 participants at the north county event and 10 participants at the south county event. Most participants represented jurisdictions and businesses in the Port district.

COMMUNITY ENGAGEMENT

A flyer announcing the events was posted on the Port website and social media platforms and a notice was included in the local newspapers. Port staff shared the announcement directly with jurisdictions within Columbia County, local chambers of commerce, and sent email invitations to Port tenants and community partners.

An online survey was posted to solicit community input concurrently with the open house. The survey asked participants to identify the Port district's greatest assets, indicate the Port's role in Diversity, Equity, and Inclusion and climate action initiatives, identify industry sectors to focus marketing, and to identify strategic priorities. The survey was open October 2 through October 31. The survey had just over 100 unique responses which were summarized in a memo at the end of the open survey window.

CONTENT PRESENTED

As participants joined the open house, they were provided with a brief handout that explained the purpose of the Plan update as well as the existing Port vision and mission statement. The open house included stations to welcome participants and share key findings about the existing conditions within the Port district.

The first station shared key findings from the Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis and stakeholder interviews. The project team engaged with participants to

discuss the key findings and ensure the SWOT analysis accurately represents community needs. The second station shared key findings from the facilities assessment as well as the market and fiscal analysis. The project team engaged with participants to solicit feedback on key findings.

SUMMARY OF FEEDBACK RECEIVED

SWOT Analysis

Participants generally shared that the SWOT analysis is on track and accurately represents existing conditions in the district. Participants felt strongly that housing is a key need in the district and county. Some participants added that there is a lack of short-term lodging in the district, adding that hotel availability is necessary to cater to prospective businesses. Several participants also agreed that the business climate in Oregon is challenging, which is not unique to the Port district.

Strategic Priorities and Priority Projects

The project team discussed strategic priorities with participants to identify community needs. Participants noted that job growth within the district should be a primary focus for the Port. Participants also said the Port should prioritize shovel-ready land needs for future development opportunities. Other comments included a need to focus on maritime growth and support for film industry opportunities.

Some participants would like to see improvements to the local transportation system. This includes safety and congestion improvements along U.S. Highway 30, which could impact the community's willingness to commute to and from north county for employment. Participants also noted that railroad crossings cause unnecessary delays for traffic, impacting residents and businesses. Additionally, there is notable congestion from the Lewis and Clark bridge which impacts commuters from Longview and therefore impacts business operations relying on commuters.

Participants at the north county event expressed that the NEXT Renewable Fuels development is a top priority. They also commented that there are industrial land opportunities in Rainier that the Port should consider.

A priority discussed at both events was a focus on leveraging Port property with private property at the Scappoose Airport and the through-the-fence agreements. Participants at the south county event discussed how to assign airport maintenance costs across Port assets and explore opportunities to enhance revenue.

One participant commented that the Port should highlight their ability to support tourism as a recreational landowner. Another participant discussed grant opportunities to leverage funds for the Scappoose Bay Marina which remains less profitable than desired by the Port, including Marine Board grants to fund dredging and upland improvements for ADA parking and kayak access.

CONCLUSION AND NEXT STEPS

The first series of open houses described above were held from 4:00 to 5:30 PM at the Senior Center in Rainier, and from 6:30 to 8:00 PM at Meriwether Place in St Helens. Participants were advised that an additional open house will be scheduled in late 2023 or early 2024 to review and comment on the Port's draft 2024 Strategic Business Plan.



Memorandum

Date: November 3, 2023

Subject: Online Survey Summary

From: Jodi Mescher, WSP
Scott Keillor, WSP

To: Gina Sisco, Port of Columbia County

OVERVIEW

An online survey was posted to solicit community input on Port assets and priorities for the future concurrently with the first open houses. The survey was open from October 2 through October 31 and received just over 100 unique responses, with responses summarized below.

Participants were asked to identify which community they live or work in Columbia County. Participants were generally evenly distributed between north and south county communities. 18 participants answered “other”; some participants shared that they live/work in all communities, Warren, Portland, or SW Washington.

PORT MISSION

Question: The Port’s mission in short is to create jobs within Columbia County. Is the Port on track to meeting its current mission statement?

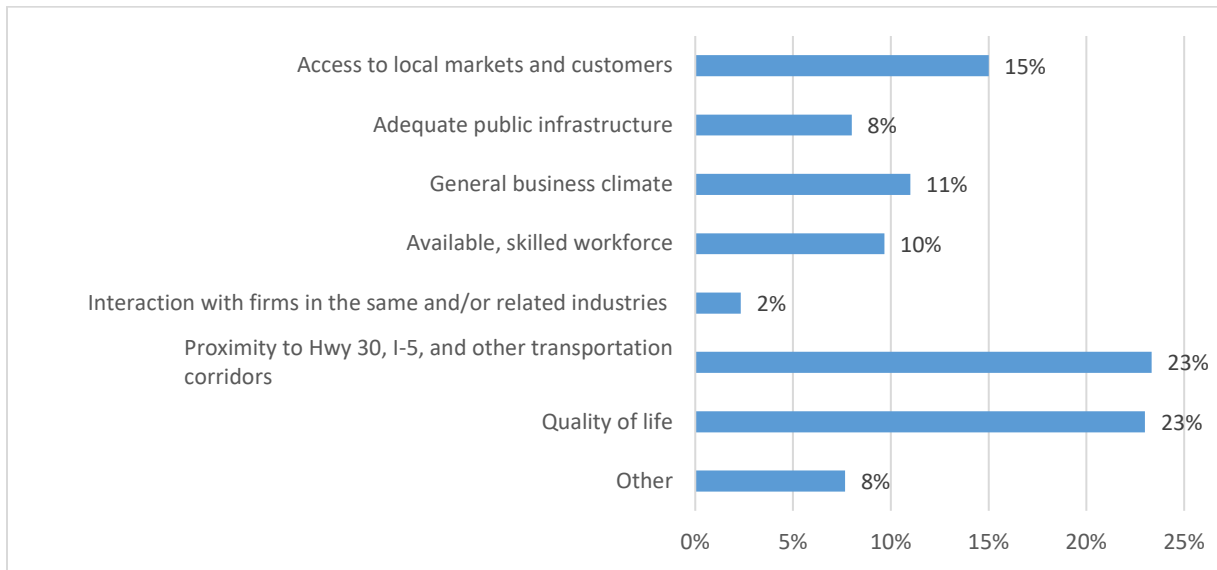
Yes	44%
No	56%

Many participants included additional comments to further explain their answer. Responses generally commented:

- The district needs new infrastructure, grocery stores, tourism and waterfront parks
- Port should focus on bringing more industry the supports new jobs for residents
- Port’s mission should expand metrics to consider connecting people and products
- Port should not support NEXT Renewable Fuels because it has a high cost to the community and the environment
- I don’t know if the Port is on track to meeting its mission

PORT ASSETS

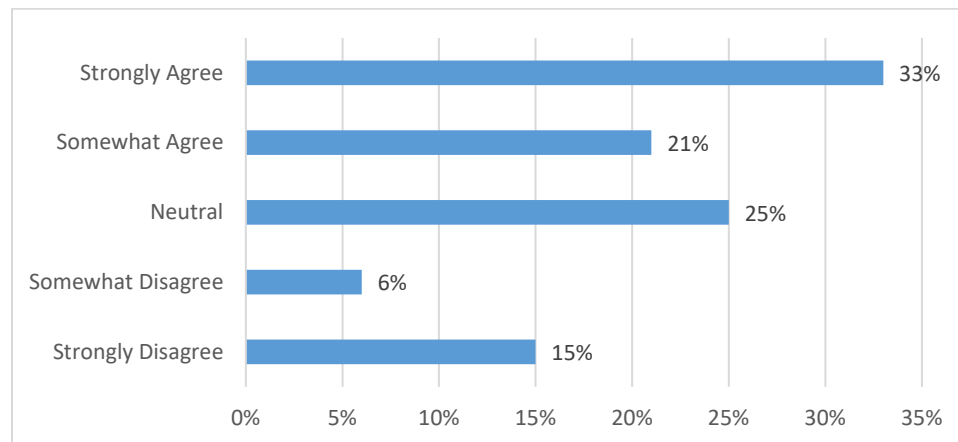
Question: What do you feel are the Port district’s greatest assets for retaining and attracting businesses?



Participants that answered “other” generally commented that the greatest assets to the district are the diverse land availability, agricultural land, access to water, and the rural character and high quality of life the area offers.

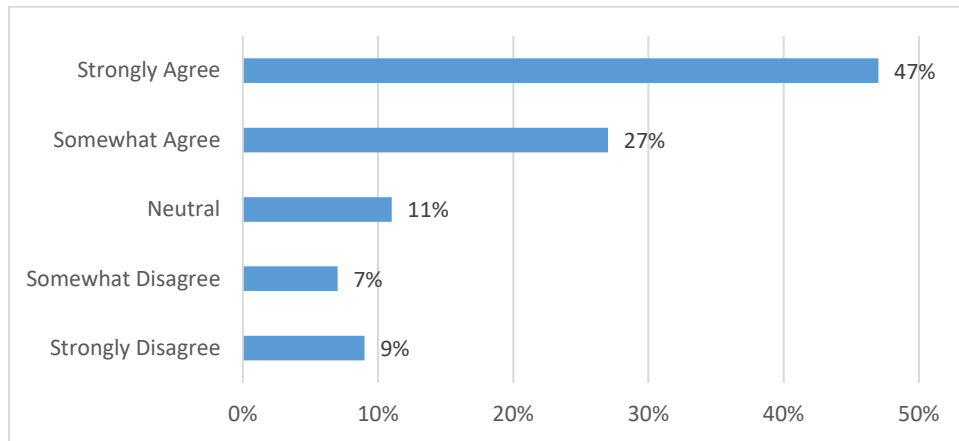
DIVERSITY, EQUITY, AND INCLUSION

Question: Do you find that Diversity, Equity, and Inclusion (DEI) initiatives are within the Port’s responsibilities?



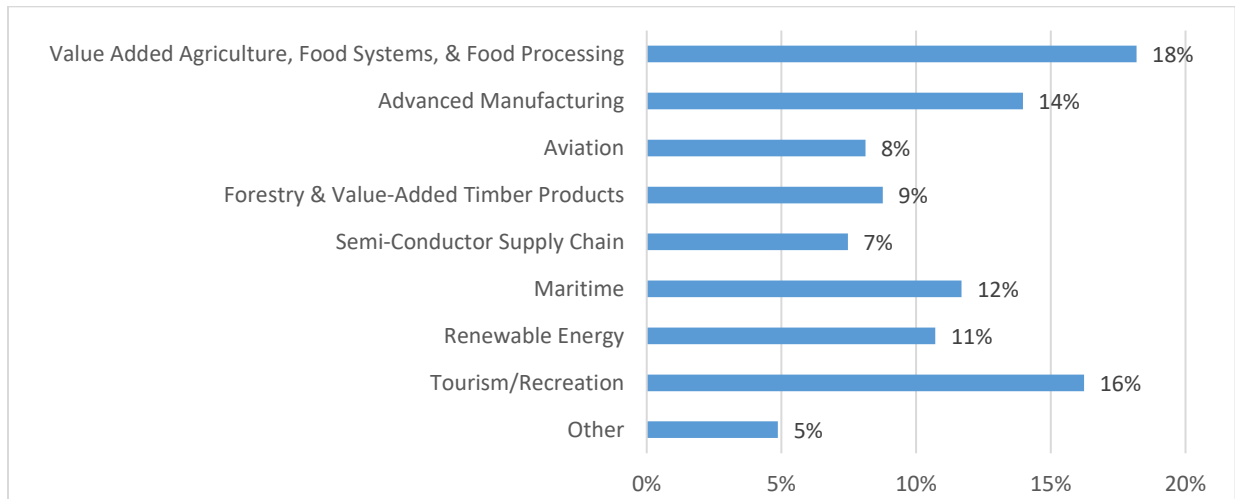
CLIMATE ACTION

Question: Do you find that climate action initiatives are within the Port’s responsibilities?



MARKETING PRIORITIES

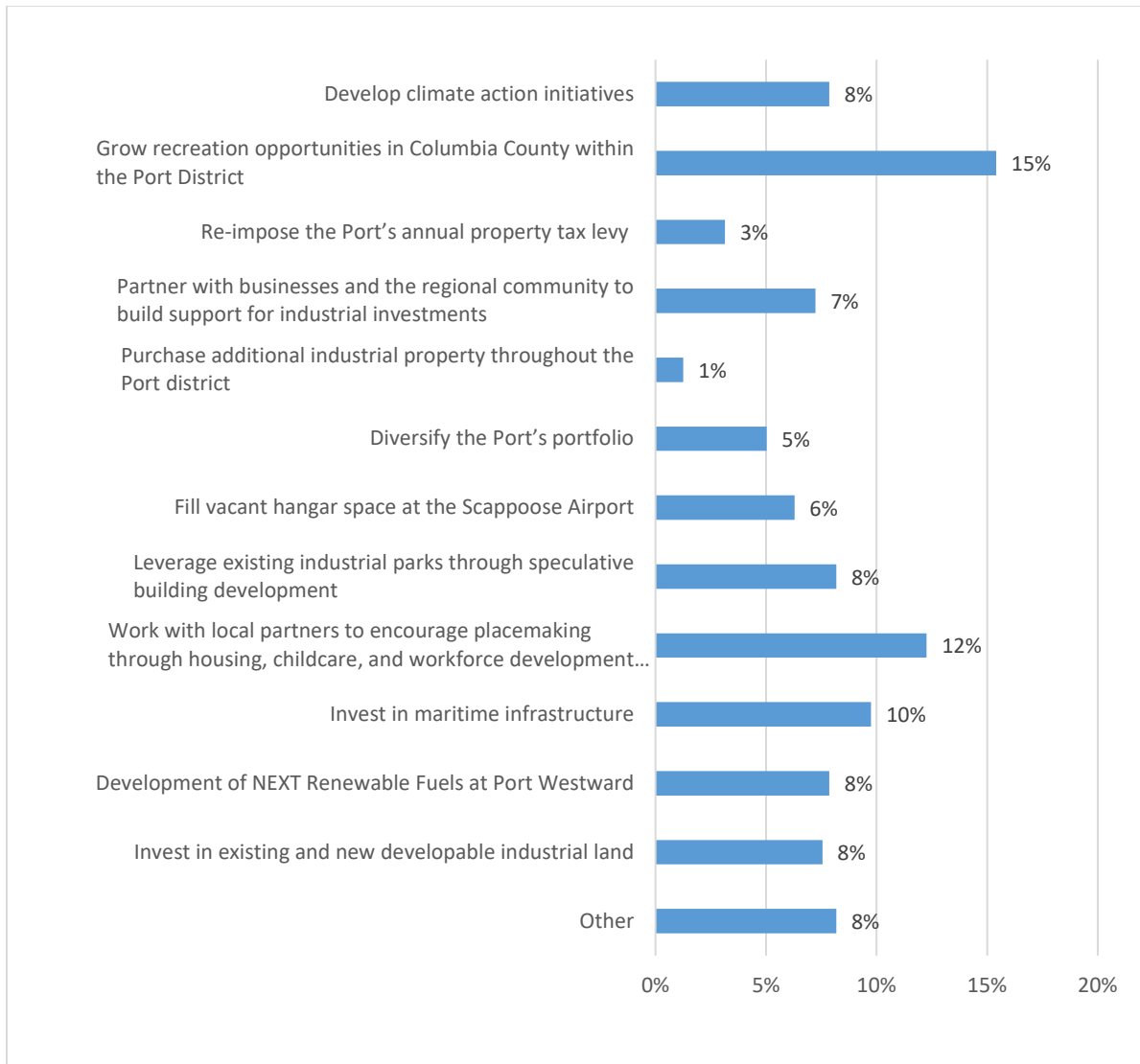
Question: Please select the industry types the Port should focus marketing Columbia County to potential employers.



Participants that responded “other” commented that the Port should focus marketing for education, environmentally focused business, responsible forestry, food security, fishing, and medical industries.

STRATEGIC PRIORITIES

Question: Please suggest three strategic priorities for the Port to consider.



In general, participants that answered “other” commented:

- Food production and supporting local food systems
- Direct funding to Clatskanie infrastructure
- Expand agriculture
- Expand recreation by developing river-front parks with trail access
- Don't support NEXT
- Protect natural resources and high quality of life



Memorandum

Date: December 6, 2023

Subject: Open House #2 Summary

From: Jodi Mescher, WSP
Scott Keillor, WSP

To: Gina Sisco, Port of Columbia County

OVERVIEW

The Port of Columbia County (Port), along with the consultant team, hosted a third open house on December 6, 2023, to review key elements of the draft Strategic Business Plan (SBP) update and solicit community input on the draft goals and strategics. The project team engaged with approximately 25 participants at the event. Most participants represented tenants and businesses in the Port district.

COMMUNITY ENGAGEMENT

A flyer announcing the event was posted on the Port website and was included in the local newspapers. Port staff shared the announcement directly with location jurisdictions within Columbia County as well as with Port industrial tenants. Additionally, Port staff shared the event directly with marina and airport tenants.

CONTENT PRESENTED

Sean welcomed participants and introduced the project team including Port representatives. Scott provided a presentation to review the draft mission and vision update, draft plan components, draft plan elements (i.e., management plan, finance plan, environmental plan, marketing plan, and capital improvement plan), and priority projects. The project team shared that the draft plan is in progress and is not ready for public review yet. In particular, the team is working to provide cost estimates and general timelines for the projects included in the capital improvement plan.

Following the presentation, the project team facilitated a conversation to hear community questions and concerns, and to solicit feedback on the draft plan elements.



SUMMARY OF FEEDBACK RECEIVED

Consistent with previous engagement events, community members expressed that livability is a key priority for existing businesses and for attracting new business to the district. Community members suggested increased recreation opportunities in north county.

Community members discussed the need to prioritize projects to balance cost with reasonable deliverables. Additionally, some community members asked how the Port can address elements outside of the Port's control. Strategic partnerships were discussed, including partnerships to ensure adequate power is available to the district, as well as strengthening partnerships with local jurisdictions.

A few participants discussed the need to address environmental constraints in the district to support prospective tenants. Some suggestions included wetland mitigation banking, addressing FEMA biological opinion impacts, and levee certification: all to streamline development permitting wherever feasible.

Community members engaged in a discussion about improvements needed at the Scappoose Bay Marina. The Port noted that sewer access and environmental permits pose a challenge to completion of Phase 2 improvements for the RV Park. Attendees largely expressed that there is a need to increase parking at the marina and improve water access for river users. A few participants suggested designing separate kayak and boat access points because the difference in the skill and experience levels pose a safety hazard to river users.

Some community members talked about capital improvement needs in the district. One community member commented that there needs to be more speculative buildings available for prospective tenants. Another community member commented that the Port should invest in new maritime facilities to increase cargo access.

In addition to capital and facility improvements, community members provided input on the draft management plan. In general, participants expressed that they Port could increase community engagement to solicit more feedback on the draft plan. Attendees suggested district-wide mailings, emailing tenants, and sending notice to cities. They also expressed that a second survey is warranted after the draft plan is released to allow the community to provide direct input on the plan elements.

CONCLUSION AND NEXT STEPS

Participants were advised that a Port Commission meeting will be held in early 2024 to review the draft plan. The plan will be available online prior to the meeting for the public to review along with an online survey to solicit feedback on the draft elements. Project staff encouraged participants to provide their email address so the Port can inform them when the draft plan is available online.

PORT OF COLUMBIA COUNTY 2024 STRATEGIC BUSINESS PLAN UPDATE

APPENDIX B Facilities Condition Assessment

DRAFT



Memorandum

Date: January 11, 2024

Subject: Facilities Assessment
Port of Columbia County SBP Update

From: Doug De Vries, PE, WSP

To: Gina Sisco, Port of Columbia County

OVERVIEW

WSP was contracted by the Port of Columbia County (Port) to update its existing 2012 Strategic Business Plan (SBP), including a general assessment of the infrastructure of Port facilities. This included gathering and assessing available technical information such as transportation system plans (TSPs), utility maps, and technical reports. A visual observation of each of the Port's nine major business site facilities is discussed below. Following the site visit, WSP discussed the existing infrastructure with the major service providers.

A general evaluation was performed for the availability, condition, and needs of Port facilities in the following categories: Public Street Access, Rail Access, Marine Capabilities, Sanitary Sewer, Electrical Power, Potable Water, Natural Gas, Stormwater, and Buildings/Structures. A summary of findings in each category is included in the following sections for Port-owned facilities.

INTRODUCTION

The Port facilities assessed below include the Columbia City Industrial Park, McNulty Creek Industrial Park, Milton Creek Industrial Park, Multnomah Industrial Park, Port Westward Industrial Park, Railroad Corridor, Scappoose Airport, Scappoose Bay Marine Park, and the Clatskanie Business Center.

RECOMMENDATIONS

The table below summarizes the recommended improvements for the Port to consider. As part of the draft SBP, WSP will provide planning level costs for key projects, an action plan including key project leads and partners, general schedules, and funding sources. Port and public review of priorities will lead to refinement of the assessment level recommendations for the Capital Improvement Plan (see Table 2 of the Strategic Business Plan).



CLATSKANIE BUSINESS CENTER



Overview

The Clatskanie Business Center is in the old Middle School building on SW Bryant Street in Clatskanie, Oregon. The Port owns approximately 1.53 acres of property at the business center. Tenants use the land for commercial, light industrial and office space. The Port is considering demolition of the school and repurposing the property.

Public Access

This facility is between SW Bryant and SW Tichenor Streets, South of SW 4th Street. It is accessed by turning south off U.S. Highway 30 on Bryant Street.

Rail Access

There is no rail access to the site.

Marine Access

There is no marine access from the business center.

Sanitary Sewer

The building is on public sanitary sewer service with the City of Clatskanie.

Electrical Power

Electrical service is provided by Clatskanie PUD.



Communications

Communication is provided by Spectrum.

Water

Water service is provided by the City of Clatskanie.

Natural Gas

Natural Gas is provided by NW Natural.

Buildings and Structures

The main building is comprised of reinforced concrete, wood framing and masonry. One of the rooms had a badly leaking roof which led to the recommendation of a roof repair or replacement. The overall building condition is poor and near the end of its service life. However, the building is operable and is equipped with an automatic fire suppression system.



PORT WESTWARD INDUSTRIAL PARK



Overview

The Port Westward Industrial Park is a former U.S. Army ammunitions depot purchased by the Port in 1966. The site is located in North Columbia County approximately seven miles northeast of the City of Clatskanie at Columbia River mile 53.

Port Westward consists of 1,602.29 acres, 674.51 acres of which is leased to Portland General Electric (PGE); 43 acres leased to Cascade Kelly Holdings, LLC (aka Columbia Pacific Bio-Refinery (CPBR) or Global Partners); 90 acres leased to NEXT Renewable Fuels; 3.2 acres to the Clatskanie PUD, 211 acres leased to Warren and Caryn Seely; and 243 acres to Columbia River Ranch.

Portland General Electric (PGE) leases the property for their Beaver Power Generation Plant and Port Westward 1 and 2 Generating Plants. The Beaver Plant is a 500-megawatt combined-cycle natural gas plant and one 24.8-megawatt steam turbine. The Port Westward Generating Plants facility is a 650-megawatt natural gas-fired electric generating plant consisting of two units. Unit 1 is a base-load power plant consisting of a combustion turbine generator, one heat recovery steam generator, and one steam turbine. Unit 1 began commercial operation in June 2007. Unit 2 is a non-base-load power plant consisting of 12 reciprocating internal combustion engines. Unit 2 began commercial operation in December 2014.

Global Partners (Columbia Pacific Bio-Refinery) currently transloads renewable diesel received by rail to ships and barges utilizing the Port's Beaver Dock. Global Partners is permitted for ethanol manufacturing and crude oil, ethanol, and renewable diesel transloading operations under separate permits. Insufficient tanks and pipelines limit operations and presents an either/or scenario. Current infrastructure includes two 100,000-barrel tanks, one 8" pipeline, one 14"



pipeline from tanks to dock loading, and 12 rail unloading stations. NEXT Renewable Fuels is in the process of permitting a renewable diesel and sustainable aviation fuel manufacturing plant at the site. The Port also leases land to farmers primarily for mint and cattle.

A gas pipeline was placed around 2010 where the railway right-of-way (ROW) used to be on the southwest side of the PGE property. There is potential to develop additional Port lands, as the Port works to rezone 737 acres from Primary Agriculture use (PA-80) to Resource Industrial Planned Development (RIPD).

In the west region there is an additional 194 acres that could be used for wetland mitigation or agriculture use. The property was previously a poplar tree farm and the remaining trees need to be harvested sometime within the next 1 to 2 years.

Public Street Access

The primary access to the site is Kallunki Road which ties into Quincy Mayger Road that connects to U.S. Highway 30 west of Clatskanie. These are typical narrow county roads with an approximate pavement width of 24 feet. They are not built to typical standards required for large truck traffic. Hermo Road, a partially built gravel road, will be completed in conjunction with a future development to connect to Quincy Mayger Road and provide alternate access to the site.

Rail Access

The Port owns a rail lead that connects to the Portland & Western Railroad main line with capacity for unit trains. Global Partners (Columbia Pacific Bio-Refinery) is currently using the lead to receive unit trains of renewable diesel. There is also a spur leading the PGE's Beaver Plant, and the Port's lead will be used by NEXT Renewable Fuels once their plant is in operation.

Marine Access

The site has deep water access varying from 45' to 73' surrounding the 1,600-foot "Beaver Dock," which is well beyond that of the Columbia River navigation limits. Steel concrete piles have been added to the wood piling to provide better structural support to the existing dock and the Port is planning to expand this work. Berth 1 of Beaver Dock was strengthened in 2016 to accommodate liquid bulk. This renovation also included an upriver extension of the dock of approximately 300 feet.

Berth 2's mooring and breasting dolphin is due to be replaced. The Port is in the process of assessing the dock to plan for its maintenance needs and so that the facility can better accommodate modern sized vessels.

Water Discharge System

The Port owns a water discharge system used by tenants for industrial purposes such as cooling and for storm water management. The system is not used to treat or dispose of sewage.

Electrical Power

Electrical power is provided by Clatskanie PUD.

Communications

Broadband connections are available to PGE and CPBR.



Water

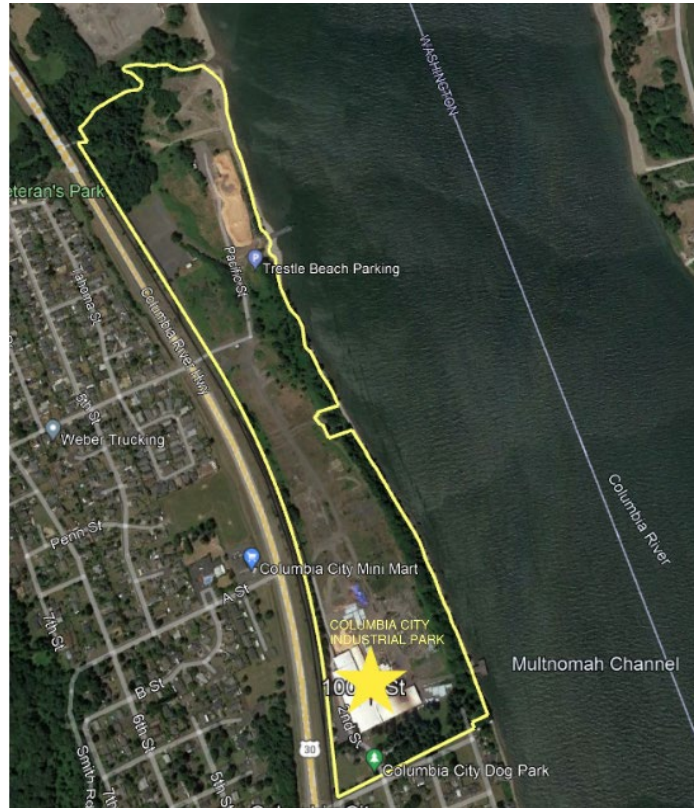
The Port owns and operates a water intake system that provides tenants with water for industrial use. The Port has a 30 cubic feet per second (CFS) water right to extract water from the Columbia River. In addition, the Port has undeveloped water rights for 18 CFS from four wells. The Port provides untreated water for industrial use. It does not provide water for domestic use.

Natural Gas – NW Natural Plat 3-060-019

One thousand (1000) therms per hour is readily available.¹

¹ Based on 2012 data.

COLUMBIA CITY INDUSTRIAL PARK



Overview

The Columbia City Industrial Park is 93 acres and located between U.S. Highway 30 and the Columbia River in Columbia City. The Port administrative office is located on this site. The industrial park has 35 acres remaining for development. The existing tenants are Lignetics (Forest Energy of Oregon), Clearwater Paper Corporation, Michels Pipeline, and the Columbia City Dog Park, which is located across the street from the Port office. The Columbia City Industrial Park is located near all major modes of transportation, as described below.

The north end of the property is available for lease and includes paved access and a rail spur. There is public access through the property to the Trestle Beach Recreation Area and a public parking area along the river. The site has access to truck, rail, and marine transport. Site paving requires an upgrade for any heavy haul usage depending on the needs of a future tenant.

Public Street Access

U.S. Highway 30 runs along the western side of the property with highway access towards the north end of the site. The site is also accessible by E Street in Columbia City on the south end. Public access to the Trestle Beach Recreational Area at the northern end of the property runs through the site. This public access may need to be adapted for future industrial use of the property. The public access is through Pacific Street as the adjacent area is not currently being leased by another tenant; there could be public access conflict concerns if another tenant leases the adjacent area.



Rail Access

The Portland & Western Railroad mainline runs along the western side of the property between the site and U.S. Highway 30. Two spurs are available; one on the north end and the other on the south end at Lignetics.

Marine Access

A dock at the northern end of the property is currently used by Clearwater Paper Corp. to load sawdust and bark chips onto barges. This dock needs structural inspection, surface repaving to accommodate heavy machinery, and pile replacement. The current river depth alongside Columbia City Industrial Park only allows for barge traffic. The Port could consider a dredge project to deepen the area to accommodate a future marine dependent tenant.

Sanitary Sewer

An 8” gravity sewer main is available in E Street that flows to a lift station at the end of 2nd Street.

Electrical Power

Electrical power is provided by Columbia River Public Utility District (PUD). Three-phase power is available at the site.

Communications

Xfinity (Comcast) currently provides broadband & telephone service to this site.

Water

Water services are provided by Columbia City through a 14” main on E Street at the south end. Fire suppression systems, including multiple hydrants, exist on site.

Natural Gas – NW Natural Plat 4-022-016

There is a 4” Class B line in E Street, near a district regulator. One thousand (1,000) therms per hour are readily available.

Stormwater

Columbia City does not have a municipal storm water system. There are several catch basins that are likely to connect to underground infiltration trenches or drywells.

Buildings and Structures

This facility includes several miscellaneous buildings of various construction types and two docks that are supported by wood piling. It is recommended that the docks be structurally evaluated.

MILTON CREEK INDUSTRIAL PARK



Overview

Milton Creek Industrial Park is located along Port Avenue and Milton Way in St. Helens. The Port owns approximately 16 acres of property at the industrial park. The industrial park is mostly developed and the buildings are 100 percent occupied. The industrial park's primary tenant is RainShadow Labs. A buildable lot is available on the east side of RainShadow Labs, but the property needs partitioning.

Public Street Access

Milton Way runs along the western side of the park, paralleling U.S. Highway 30. Milton Way turns into Port Avenue at the southern end. Port Avenue then runs into Old Portland Road to the east. Both Milton Way and Port Avenue are classified as Collector Streets in the City of St. Helens TSP.

Rail Access

The Portland & Western Railroad mainline runs along the western side of the property between the site and U.S. Highway 30. A spur parallels the mainline running almost the entire length of the site that turns east, paralleling Port Avenue. This spur continues to the Railroad Corridor.

Marine Access

There is no marine access at this location.



Sanitary Sewer

The City of St. Helens Public Sanitary Sewer gravity line is available in Milton Way and Port Avenue.

Electrical Power

Electrical Power is provided by Columbia River PUD. Three-phase power is provided to the site.

Communications

Xfinity broadband and telephone service is available at the site.

Water

Water service is provided by the City of St. Helens through a 14” main in Port Avenue and 12” main in Milton Way. Fire suppression is available at the site.

Natural Gas – NW Natural Plat 4-017-015

There is a 2” line in Milton Way. Depending on where the new load is, it can serve 100 to 500 therms per hour.

Stormwater

Catch basins are available in some areas that connect to stormwater basins. Most catch basins connect to a city stormwater system on the north side of Port Avenue to the east of the Port owned properties.

Buildings and Structures

This park includes a variety of Port-owned and tenant-owned buildings.

MCNULTY CREEK INDUSTRIAL PARK



Overview

The McNulty Creek Industrial Park is located off Gable Road in St. Helens. The industrial park is approximately 54 acres, with 40 acres available for development. The industrial park property has Tier 1 development land available and is a certified site by the State of Oregon. The industrial park's only tenant is Kinnear Specialties, a custom hydraulic systems manufacturer.

Public Street Access

McNulty Way, classified as a Collector Street by the City of St. Helens TSP, bisects the McNulty Creek Industrial Park. It ties into Gable Road to the north and U.S. Highway 30 via Millard Road to the south. Much of McNulty Way has been improved with sidewalks, curbs, gutters, and storm drains. Industrial Way is a Collector Street off McNulty Way. The extension of Industrial Way to Old Portland Road was included in the 2011 St. Helens Transportation System Plan as a long-term project (2022 to 2031).

Rail Access

An existing Port-owned railroad spur that bisects the park and connects to the Portland & Western Railroad mainline near U.S. Highway 30 was reconditioned in 2022. This spur ends at the Multnomah Industrial Park.



Marine Access

There is no marine access at the McNulty Creek Industrial Park.

Sanitary Sewer

The City of St. Helens Public Sanitary Sewer is available off McNulty Way and Industrial Way.

Electrical Power

Electrical power is provided by Columbia River PUD. Three-phase power is adjacent to the site.

Communications

Xfinity currently provides broadband & telephone service to this site.

Water

Water service is provided by the City of St. Helens with a 12” water main in McNulty Way. Fire hydrants exist on site.

Natural Gas – NW Natural Plan 4-016-014

There is a 4” Class B line in McNulty Way, near the district regulator. One thousand (1000) therms per hour are readily available.

Stormwater

Catch basins are available in some areas that connect to treatment basins with limited capacity.

Buildings and Structures

A Port-owned, pre-engineered steel building is located towards the end of Industrial Way. Two derelict wooden barns are located along Old Portland Road that need to be removed.

RAILROAD CORRIDOR



Overview

Railroad Corridor is located off Railroad Avenue south of St. Helens. The Port owns approximately 104 acres of property at the industrial site, with 50 acres of land holding with Tier 3 development readiness. Tenants are industrial in nature and use the land for waste management services and manufacturing.

The Port is working with the Oregon Department of Environmental Quality (DEQ) to clean-up approximately 20 acres along the river at Railroad Avenue due to Pope & Talbot creosote contamination. The site was used for wood treatment from 1912 to 1960 (the Port purchased the property in 1963). The remedial investigation and feasibility study are complete. The Record of Decision for preferred remedy was issued in Sept. 2023. Seventeen acres to the northeast of the contaminated site have been declared “no further action” by the DEQ.

Public Street Access

Railroad Avenue is the primary access for this site. It is classified as a Collector Street in the City of St. Helens TSP. Railroad Avenue travels east towards the Multnomah Channel from intersection of Old Portland Road and Gable Road. There is a secondary private access point from the Boise property to the North Rail Access. An old military Bailey Bridge provides vehicle access to the southern portion of the site over Milton Creek. This bridge is part of the ODOT bridge inspection system. Replacement of Bailey Bridge is recommended. A secondary access road to north of the “no further action” portion of the site is also recommended.



Rail Access

A rail spur off the Portland & Western Railroad mainline bisects the property. This is the spur that parallels Port Avenue.

Marine Access

There is marine access from a small float dock not appropriate for commercial use.

Sanity Sewer

Gravity sanitary sewer is available in Railroad Avenue that flows to the city's pump station.

Electrical Power

Electrical Power is provided by Columbia River PUD. Three-phase power is provided to the site.

Communications

Xfinity is looking into the availability of broadband service to this site.

Potable Water

Water service is provided by the City of St. Helens with an 8" watermain in Railroad Avenue.

Natural Gas – NW Natural Plat 4-015-015

High pressure gas is available up to 1200' from Old Portland Road on Railroad Avenue; then 2" Class B. Depending on location, 100-1000 therms per hour is readily available.

Stormwater

As is typical in rural industrial areas, the park has some informal stormwater management. All improved surfaces at the industrial park sheet flow into adjacent ditches or natural areas.

Buildings and Structures

This facility includes several miscellaneous buildings of various construction types.

MULTNOMAH INDUSTRIAL PARK



Overview

Multnomah Industrial Park is located off Old Portland Road. The Port owns approximately 155 acres of property at the industrial park.

Port tenants include Composites Universal Group, an advanced composites manufacturer, ORPET, a post-consumer plastic bottle recycling facility, and Stella-Jones Corporation, a manufacturing center that leases land for utility pole production and the pier for river transport. U.S. Pipe has a facility used to manufacture fittings. Even Construction, a custom floating home builder, is located there as well. The Port of Columbia County maintenance shop is being relocated near the entrance to the industrial park allowing for tenant expansion.

Public Street Access

The Port maintains gated access off Old Portland Road to this site. Old Portland Road is classified as a Minor Arterial in the City of St. Helens TSP. Old Portland Road connects to Gable Road to the north and U.S. Highway 30 to the south.

Rail Access

A spur off the Portland & Western Railroad mainline bisects this site. This is a continuation of the spur that runs through the McNulty Industrial Park and was reconditioned in 2022.



Marine Access

There is a boat ramp for industrial tenants that services Stella-Jones, Even Construction, and Omega Morgan. There is one dock currently used by Even Construction.

Sanitary Sewer

A sanitary sewer pump station was installed in 2012 as part of the ORPET tenant improvements. This pump station discharges to a City of St. Helens manhole on the northern side of Old Portland Road at the intersection with the access road with a 3” pressure line.

Electrical Power

Electrical power is provided by Columbia River PUD. Three-phase power is provided to the site.

Communications

Xfinity broadband and telephone service are provided at the site.

Water

Water service is provided by the City of St. Helens via a 16” main in Old Portland Road and 4” in the access road. Fire suppression is available (independent and Port-owned systems).

Natural Gas – NW Natural Plat 4-014-014

Near high-pressure gas is available along Old Portland Road. One thousand (1000) therms per hour are readily available.

Stormwater

Stormwater treatment basins are included for some areas. Most areas drain to the river through roadside ditches.

Buildings and Structures

This facility includes several buildings of various construction types and a dock that is supported by wood pilings. A structural inspection for the dock was completed in 2018. In 2020, the dock was refurbished to remove the steam vats, repair the dock’s deck and structure, and make other improvements.

SCAPPOOSE AIRPORT



Overview

The Scappoose Airport is located east of U.S. Highway 30 within the Scappoose city limits. The Scappoose Airport is the county's largest airport, covering approximately 196 acres. The airport includes a 5100' runway, two parallel taxiways, standard lighting, Precision Approach Path Indicator Lighting (PAPI lighting), and a weather reporting station. The Port owns and maintains the airport while the onsite fixed-base operator is privately owned. This facility includes several buildings of various construction types, mainly metal. Uses include light fabrication, offices, and corporate and private airplane hangars. The airport neighbors the Oregon Manufacturing and Innovation Center (OMIC R&D) and the Portland Community College OMIC Training Center.

The T-hangars on the east side of the property have passed their service life and may need to be demolished and replaced. All the T-hangars on the property are 100% occupied, except the five open-sided hangars on the east side. There are two corporate hangars that are currently vacant on the west side.

The Scappoose Airport Master Plan was last updated in 2015 with funding support from the Federal Aviation Administration (FAA). Planned capital improvements within the airport master plan include runway repaving rehabilitation, taxiway repaving, and future hangar development.



Public Street Access

The airport is accessed from Honeyman Road, which connects to West Lane Road just north of the Scappoose city limits. West Lane Road intersects Crown Zellerbach Road within the Scappoose city limits. Crown Zellerbach Road was recently improved to current standards. West Lane Road intersects U.S. Highway 30 approximately two miles north of Crown Zellerbach Road.

Rail Access

The Portland & Western Railroad mainline is approximately one mile to the west from the airport.

Marine Access

There is no marine access from the airport.

Sanitary Sewer

A water / sewer project in 2019 brought water and sanitary sewer service to the west side of the airport connecting to the City of Scappoose public services. Septic systems are the disposal means for sanitary sewer on the east side of the airport.

Electrical Power

Electrical power is provided by Columbia River PUD. Three-phase power is provided to the site.

Communications

Xfinity broadband and telephone service are provided at the site.

Potable Water

Water service is provided by the City of Scappoose through an 18” main in West Lane and a 12” main in Sky Way Drive. Fire protection is included on the west side. The east side is served by a well. A project is underway to extend and connect the east side to city water through a 10” line along Airport Way and Moore Road.

Natural Gas – NW Natural Plat 4-006-010

The nearest natural gas is 1.5 miles away. It is a high-pressure line so capacity is available if the main extension can be justified.

Stormwater

The closest public storm sewer is a 24” PVC line just south of the airport within the City of Scappoose.

SCAPPOOSE BAY MARINE PARK



Overview

The Scappoose Bay Marine Park is located along the Columbia River just south of St. Helens. The Port owns approximately 26 acres of property at the Scappoose Bay Marine Park, with four acres available for development. Port tenants include Next Adventure Scappoose Bay Paddling Center, which uses the facility to access the marina for recreational activities, and Scappoose Bay Watershed Council, a non-profit organization. The marina is scheduled to be dredged in fall 2024, a \$2.5 million project. The marina was previously dredged in 2015 and ongoing maintenance dredging is needed at the marina every 7-10 years.

An additional \$6.5 million is needed for the Marina Improvement Project, of which the upland phase is scheduled to begin in spring 2024. The upland work will include building a new kayak unloading and staging area in the upper parking lot with an air fill station, installation of a second pay station, creation of additional public and ADA parking spots, and widening the existing sidewalks.

Planned in-water improvements include replacing the boat ramp, the installation of additional low profile kayak dock fingers, and a kayak beach launch. Plans also include installing a wider pier and gangway, replacing the main dock with a new concrete dock, and installing an ADA accessible kayak platform.

The marina is very popular, but it is not profitable. In the last decade, the Port built a 23-space RV park adjacent east of the marina; both facilities enjoy river and trail access points. In 2022, the Port added an RV dump station. Camping rates for publicly owned facilities are lower than the typical RV camping rates for private facilities. The Port has discussed expanding the RV park to the other side of a local creek and is looking into the potential to raise rates closer to private campground rates.



Public Access

The Marine Park is accessed off Old Portland Road just north of the intersection with U.S. Highway 30. Old Portland Road is classified as a Minor Arterial in the City of St. Helens TSP. From the water, the marina is on the Scappoose Bay from the Multnomah Channel.

Rail Access

The Portland & Western Railroad mainline is just to the west of the marine park, adjacent to U.S. Highway 30.

Marine Access

There is recreational marine access to the Columbia River at Scappoose Bay for recreational boating, fishing, and paddle sports.

Sanitary Sewer

Septic systems are the disposal means for sanitary sewers. Individual pumps are installed within the floating structures that pump sewage to an upland disposal system. The office/retail building and public restroom also use this septic system.

Electrical Power

Electrical power is provided by Columbia River PUD. Three-phase power is adjacent to the site.

Communications

Xfinity broadband and telephone service are provided at the site.

Water

Water service is provided by the City of St. Helens through a 16" water main to the north end of the site in Old Portland Road. This 16" transitions into a 6" along the west side of the site in Old Portland Road. Fire suppression is available at the site.

Natural Gas – NW Natural Plat 4-014-014

A 4" main is available with a nearby district regulator and a capacity of 1,000 therms per hour available.

Buildings and Structures

On shore, this facility includes a pre-engineered structure that contains office and retail space. There is a concrete/masonry public restroom, picnic gazebo and ticket kiosk. On the water, there is a gangway and five docks with individual moorage slips, including one dock with covered moorage. Additionally, there are individual private floating homes moored at the marina. A nature trail includes a pedestrian bridge that has a decayed deck system that should be repaired or replaced. Storm drainage is directed to the adjacent Scappoose Bay. The Bayport RV Park and Campground contains 23 RV sites. A separate building contains restrooms and showers for RV Park and campground guests.

**PORT OF COLUMBIA COUNTY 2024
STRATEGIC BUSINESS PLAN UPDATE**

**APPENDIX C
Market and Fiscal Analysis**

DRAFT

MARKET OVERVIEW

This market analysis section identifies existing and emerging economic opportunities for the Port of Columbia County. Findings from this work are intended to assist the Port of Columbia County and its government partners and stakeholders with identifying business activities that are consistent with the Port's Mission and Vision. The goal of this section is to evaluate economic development opportunities for the Port of Columbia County that are consistent with regional and global market trends.

The steps used to complete this work are described below.

1. Identify strategic advantages for the Port of Columbia County with regard to geographic location/proximity to primary and secondary trade areas, regional transportation infrastructure and available amenities.
2. Review historical population and employment trends data.
3. Describe national, state, and local economic trends.
4. Review information regarding existing and potential growth of major employers.
5. Compile wage and salary employment data for Columbia County and conduct industry clusters analyses to ascertain emerging economic development characteristics.
6. Identify tourism trends and related market opportunities.
7. Evaluate current economic impacts of employment and economic activity attributed to the Port of Columbia County.
8. Prepare market-supportable 10- and 20-year commercial and industrial development forecasts for the Port District, and potential capture rates for Port-owned land and facilities.

As part of this work effort, the consultant team evaluated current economic conditions, marketing plans and statistics provided by local, state, and federal government agencies.

A. ECONOMIC OVERVIEW

International and National Overview

The economy within the Port of Columbia County District is directly linked with the greater Portland-Vancouver-Hillsboro OR-WA Metropolitan Statistical Area (Portland MSA), which is influenced by economic activity across the United States and global marketplaces. The Port District includes most of the population of Columbia County, which is one of seven counties located in the Portland MSA.

As indicated in **Exhibit 1**, Columbia County is the gateway to the northwest portion of the Portland MSA.¹ The Port of Columbia County's proximity to Washington (across the Columbia River) also provides a labor pool and convenient north-south interstate access to I-5 (including nearby cities of Kelso and Longview). The vast majority of economic interaction between the Port of Columbia County and the larger region is contained within the Portland MSA.

Exhibit 1 Portland-Vancouver-Hillsboro OR-WA MSA



The Portland MSA is the largest regional economy between San Francisco and Seattle and ranks 19th in the United States in terms of regional population. The Portland MSA contains over 3.3 million residents, has a civilian labor force of 1.4 million, and generates an annual GDP in excess of \$187 billion.

The U.S. and Oregon economy are still recovering from the national economic recession brought on by the global Covid-19 pandemic which officially began in March 2020. Moderate economic expansion is occurring nationally and in Oregon. According to the U.S. Bureau of Economic Analysis, real Gross Domestic Product (GDP is the measure of the value of all goods and services produced annually) increased in 2022 at an annual rate of 9.9%; and increased at an annual rate of 9.8% in 2021.

¹ The Portland MSA is defined by the U.S. Office of Management and Budget to include the following counties in Oregon: Columbia, Clackamas, Multnomah, Washington, Yamhill; and Clark and Skamania Counties in the State of Washington.

The near-term GDP outlook for the U.S. is lack luster as interest rates remain high and the U.S. dollar remains strong. According to December 2022 projections by the Federal Reserve Bank, U.S. GDP is expected to remain relatively flat over the next two years. A comparison of GDP and Consumer Price Index (CPI) trends and forecasts for global developing and developed countries is provided in **Exhibit 2**.

Exhibit 2, GDP and CPI Comparisons, Year-over-Year Change

	GDP			CPI		
	2022 est.	2023 proj.	2024 proj.	2022 est.	2023 proj.	2024 proj.
Advanced Economies	2.7%	0.2%	1.3%	8.0%	4.9%	2.3%
<i>United States</i>	2.0%	0.2%	0.0%	8.0%	3.8%	2.5%
Eurozone	3.3%	-0.6%	2.0%	8.5%	6.2%	2.1%
United Kingdom	4.4%	-1.5%	1.7%	9.1%	8.4%	2.5%
Japan	1.2%	1.3%	1.5%	2.4%	1.8%	0.8%
Canada	3.5%	0.4%	2.4%	6.8%	3.4%	1.9%
Switzerland	2.0%	0.1%	2.2%	3.1%	2.2%	1.5%
Australia	3.6%	1.5%	2.4%	6.4%	4.3%	2.9%
Developing Economies	2.0%	2.8%	3.5%	6.5%	5.2%	4.6%
China	3.0%	4.9%	4.9%	2.0%	2.3%	2.0%
India	6.5%	5.7%	6.5%	6.8%	4.5%	5.0%
Mexico	3.1%	0.7%	2.1%	7.9%	5.5%	3.6%
Brazil	3.1%	0.5%	2.1%	9.0%	5.0%	4.0%

Source: Wells Fargo, forecast as of December 16, 2022

Abbreviations: GDP = gross domestic product; CPI = consumer price index

In Oregon, state economists are predicting a continued upturn in the short term, although the Oregon Office of Economic Analysis notes that record low unemployment is a major headwind that curtails business expansion.

International Trade Overview

The greater Portland-Vancouver region is one of four primary international trade gateways along the West Coast. A developing middle class within Asian and Middle Eastern economies will result in significant increases in demand for trade for international exports.

As global and state GDP rises and commodity trade increases, Oregon ports should benefit from increases in import and export activity. Oregon exports reached a record high of \$34.5 billion in 2022 (according to the most recent data by the U.S. International Trade Administration) up 15% from 2021. Oregon’s leading trade partner is China, which imports 24.5% of Oregon exports. Other leading export destinations in decreasing order include Mexico, Canada, Malaysia, Ireland, Japan, South Korea, and Israel.

Population and Income Trends

As indicated in **Exhibit 3**, Columbia County reached a record-high population level with 53,588 residents in 2022. Columbia County’s average annual population growth rate (AAGR) from 2010 to 2022 was 0.7%, just below the statewide average (0.85%). Within Columbia County the fastest growing jurisdictions in terms of population included Scappoose (1.9%) and Clatskanie (1.8%).

Exhibit 3: Population Trends

	2010	2020	2022	AGR 2010-2022
Columbia County	49,351	52,589	53,588	0.69%
Clatskanie	1,767	2,189	2,177	1.75%
Columbia City	1,946	1,949	1,943	-0.01%
Rainier	2,113	2,080	2,022	-0.37%
Scappoose	6,592	8,010	8,230	1.87%
St. Helens	12,883	13,817	14,369	0.91%
Oregon	3,831,074	4,237,256	4,240,137	0.85%

Source: U.S. Census Bureau (2010 and 2020 Census) and Portland State Population Research Center.

Abbreviations: AGR = average annual growth rate

Income levels within Columbia County have been increasing since 2010. As indicated in **Exhibit 4**, the median household income level for Columbia County was approximately \$73,909 in 2021 and the average per capita income level was \$27,449.

Exhibit 4: Income Trends

	2010	2021	AGR
Median Household Income			
Columbia County	\$55,199	\$73,909	2.7%
Oregon	\$49,260	\$70,084	3.3%
United States	\$51,914	\$69,021	2.6%
Per Capita Income			
Columbia County	\$20,078	\$27,449	2.9%
Oregon	\$20,940	\$28,822	2.9%
United States	\$21,587	\$29,829	3.0%

Source: 2010 Census (in 2010 dollars) and 2021 ACS 5-year Estimates (in 2021 inflation-adjusted dollars)

Development Opportunities and Constraints

The Port of Columbia County’s geographic, economic, demographic and infrastructure characteristics set the framework within which businesses can establish themselves and grow. Depending on the industry, a certain characteristic can be both an opportunity and a constraint to job creation. An analysis of the Port of Columbia County in context with the broader regional or state economy is helpful in identifying “target industries” that are most likely to be attracted to the area.

Location and Geography

The Port of Columbia County is located within the northwestern portion of the greater Portland MSA in the lower Columbia River basin. The terrain includes significant land at low elevations, with some moderate hills and floodplains/wetlands near drainage basins and ponds. Columbia County’s moderate sized cities, relatively low land/rent levels, and convenient access to both Portland and Longview/Kelso markets make the area a favorable location for residents and businesses.

Transportation and Infrastructure

The Port of Columbia County industrial and commercial properties are primarily located along U.S. Highway 30 in Columbia County. Interstate access is provided by I-5 within a 10-minute drive from the Oregon side of the Lewis and Clark Bridge in Rainier via Longview/Kelso. I-5 is within a 25-minute drive from Scappoose via Hwy. 30. The Portland and Western Railroad provides freight rail access from Portland through the city of Clatskanie to Wauna. River barge access is provided at several sites along the Columbia River, with a major marine terminal located at Port Westward near the city of Clatskanie.

In addition to the highway and rail facilities, the Port owns/operates the Scappoose Airport, which provides general aviation access. Waterborne river access (with both highway and rail service) is provided at several private industrial sites along the Columbia River. Recreational public river access is available at several marinas and boat launches, including the Scappoose Bay Marina owned by the Port.

There are no known water, sewer, natural gas, or telecommunications limitations within the Port of Columbia County that would curtail long-term growth.

Quality of Life in a Business-Friendly Environment

Abundant parks, recreational access, relatively low-cost of living, and favorable infrastructure are beneficial to businesses located within the Port district. A variety of housing options, ranging from affordable choices for seniors to executive housing, are available at prices that are well below the Portland MSA average. Relatively low land costs, personal and property tax rates, and electric power rates also benefit major employers in the Port district.

Public/private partnerships and proactive marketing and business assistance by the Columbia County Economic Team, Business Oregon, and Columbia Pacific Economic Development District (and their public and private partners) provide local businesses with favorable loans for capital investments, microloans, technical assistance, and workforce training.

Development Overview

In recent years, several private and public facility investments have occurred or are proposed inside the Port district, such as:

- NEXT Renewable Fuels, a producer of next generation green renewable diesel and sustainable aviation fuel, has advanced through local and state permitting processes to develop a refinery at Port Westward Industrial Park. The project awaits the approval of federal permits.
- The Port is planning major investments at the Scappoose Bay Marina. The projects, which are expected to cost over \$8 million, will include dredging, replacing the boat ramp and expanding the kayak launch area with improved ADA access away from the primary boat launch. Construction of the upland portion of the improvement project is expected to get underway in spring of 2024.

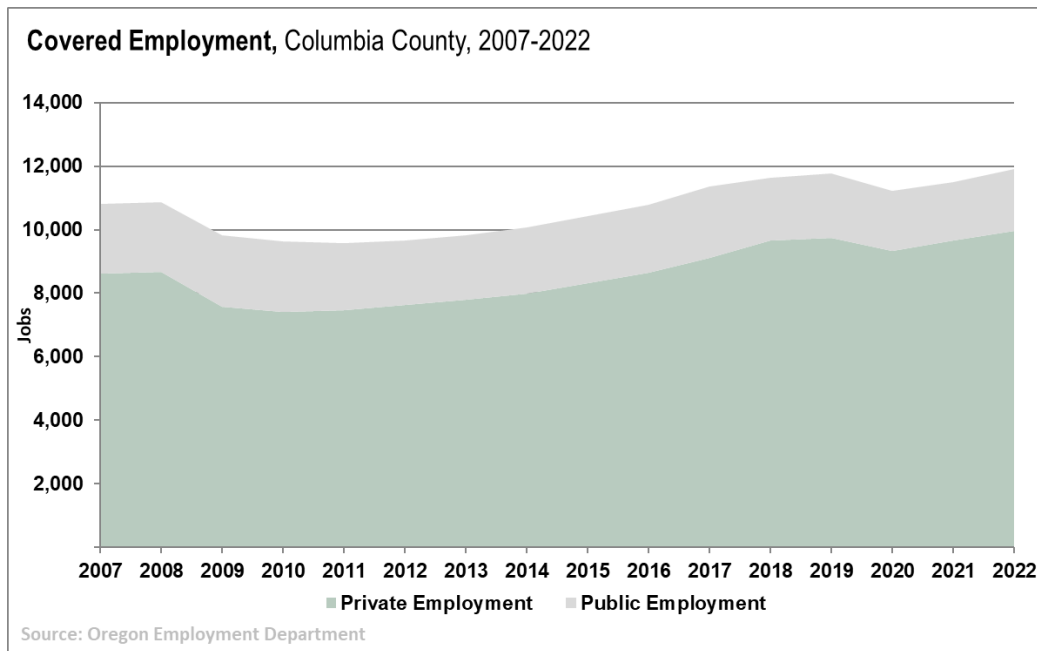
B. MARKET OPPORTUNITIES

Employment Trends

According to the Oregon Employment Department, at the end of 2022, Columbia County had 1,484 private employers (including non-profits) and 70 public employer entities (at separate locations).

Total employment in Columbia County included 11,908 “covered jobs” in 2022, which reflects jobs that are covered by unemployment insurance. As shown in **Exhibit 5**, the current level of employment now exceeds pre-pandemic levels and is at a historic high in Columbia County.

Exhibit 5: Columbia County Employment Trends, 2007-2022



Major Employers

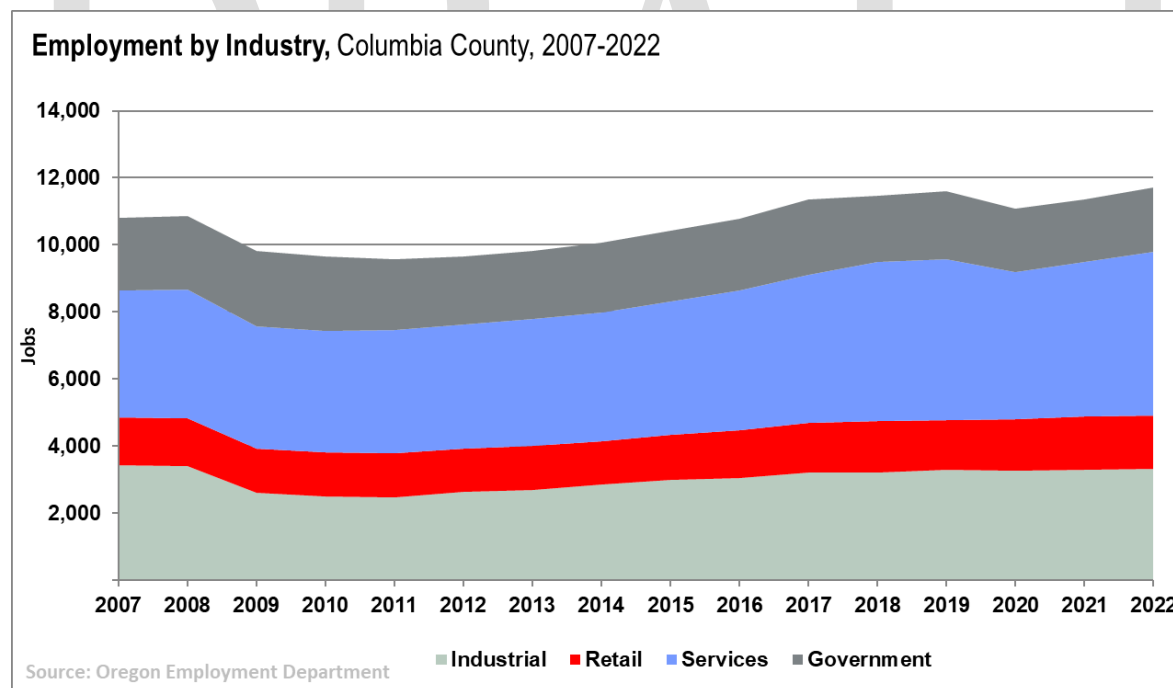
The top 10 private employers within the Port of Columbia County District are reflected in **Exhibit 6**. The largest private employers include Fred Meyer, Rightline Equipment, Pacific Stainless Products, Cardinal Services, Walmart, and Safeway Stores.

Exhibit 6: Top 10 Private Employers in Columbia County

Employer	Location	Description	Employees
Rightline Equipment Inc.	Rainier	Industrial Machinery Manufacturing	200-300
Fred Meyer	Scappoose	Warehouse Clubs and Supercenters	200-300
United States Gypsum Co.	Rainier	Gypsum product manufacturing	100-200
Means Nursery Inc.	Scappoose	Nursery and Tree Production	100-200
Safeway Stores Inc.	St. Helens	Supermarkets and Other Grocery	100-200
Walmart Associates Inc.	St. Helens	Department store	100-200
Cardinal Employer Organization Inc.	St. Helens	Professional Employer Organization	100-200
Pacific Stainless Products Inc.	St. Helens	Sheet Metal Manufacturing	100-200
Dyno Nobel Inc	Deer Island	Fertilizer Manufacturing	50-100
Olympic Forest Products	Mist	Sawmill	50-100

As shown in **Exhibit 7**, job growth in Columbia County has broadly occurred in the services sector, which added 1,100 jobs since 2007. Retail has also seen modest improvements, adding 160 jobs. Employment in the industrial (-100 jobs) and government (-230 jobs) sectors is down slightly from 2007 levels.

Exhibit 7: Columbia County Employment Trends by Sector, 2007-2023 (covered workers)



As indicated in **Exhibit 8**, the total 2022 employment in Columbia County is estimated to include: 1,650 manufacturing jobs, 1,590 retail trade jobs, 1,490 education and health service jobs, and 1,350 leisure and hospitality jobs.

Exhibit 8: Total Employment in Columbia County, 2018-2022

Industry	2018	2019	2020	2021	2022	2018-2022	
						Jobs	Annual Growth Rate %
Total nonfarm employment	11,634	11,778	11,208	11,500	11,908	69	0.6%
Total private	9,654	9,746	9,340	9,647	9,968	79	0.8%
Mining, logging, and construction	910	890	870	930	900	(3)	-0.3%
Mining and logging	230	220	210	200	190	(10)	-4.7%
Construction	680	670	660	730	710	8	1.1%
Manufacturing	1,630	1,630	1,670	1,630	1,650	5	0.3%
Trade, transportation, and utilities	2,190	2,260	2,250	2,330	2,360	43	1.9%
Retail trade	1,510	1,500	1,520	1,590	1,590	20	1.3%
Information	50	50	50	50	60	3	4.7%
Financial activities	390	400	390	410	420	8	1.9%
Professional and business services	880	870	910	950	1,090	53	5.5%
Education and health services	1,430	1,440	1,550	1,580	1,490	15	1.0%
Leisure and hospitality	1,370	1,420	1,110	1,220	1,350	(5)	-0.4%
Other services	640	620	400	400	460	(45)	-7.9%
Government	1,980	2,030	1,870	1,850	1,940	(10)	-0.5%
Federal government	70	70	80	70	70	0	0.0%
State government	160	160	170	180	180	5	3.0%
Local government	1,750	1,800	1,620	1,600	1,690	(15)	-0.9%
Local education	1,040	1,070	920	890	960	(20)	-2.0%
Local government excluding educational services	710	730	700	710	730	5	0.7%

Source: Oregon Employment Department.

Port-Related Economic Benefits

The Port of Columbia County has 36 industrial and commercial tenants on Port-owned land/buildings. The major employers that occupy Port properties (land and buildings) include, but are not limited to:

- Portland General Electric (PGE) Beaver Power Generating Plant and Port Westward 1 and Port Westward 2 Generating Plants, electric power plants located at Port Westward Industrial Park.
- Oregon Aero, a manufacturer and distributor of aircraft parts located at Scappoose Airport.
- Composites Universal Group, an aircraft parts manufacturer located at the Multnomah Industrial Park in St. Helens.
- RainShadow Labs, a firm specializing in custom formulation and manufacturing of personal care, private label products located at Milton Creek Industrial Park in St. Helens.
- Lignetics Group, a manufacturer of wood pellets located at Columbia City Industrial Park.
- Columbia Pacific Bio Refinery (also known as Global Partners), a biofuel transloading terminal located at Port Westward Industrial Park.
- U.S. Pipe, a manufacturer of industrial fittings located at the Multnomah Industrial Park.
- ORPET, a post-consumer plastic bottle recycling facility at the Multnomah Industrial Park.

The business operations that directly benefit from the Port of Columbia County and its investments in land, buildings and infrastructure provide far-reaching economic and fiscal benefits. Based on the current operations of the Port and its major tenants, an economic and fiscal impact analysis was conducted using analysis provided by the University of Oregon, using IMPLAN (Impact Analysis of Planning) model, and by FCS GROUP (using the Business Oregon Fiscal Impact Model for Oregon Ports).

Annual economic impact metrics for the Port of Columbia County District are summarized for the year 2021 in the table below.

Key findings include:

- There are approximately 37 separate business entities along with the Port that are directly responsible for 480 jobs (including full and part-time workers).
- The spending of labor income and business operations (on supplies and services) from direct business spending supports an additional 949 jobs within the region.
- In total there are 1,429 jobs supported by Port-dependent businesses and related operations.
- Port-related businesses paid workers approximately \$65.9M in labor income in 2021 with annual sales output of an estimated \$256.8M.
- These businesses contributed nearly \$135.3M in value added (gross domestic product) for Oregon and the nation.
- The taxable sales and related property and leasehold taxes paid by Port-related businesses generated an estimated \$17.9M in state tax revenue and \$16.6M in local tax revenue in 2021.

Annual Economic Impact of Port-Dependent Businesses and Port Operations, 2021 estimate						
	Employment*	Labor Income**	Value Added (GDP)**	Output (Sales)**	State Taxes**	Local Taxes**
Impact Type						
Direct	480	\$35,999,044	\$85,564,701	\$166,529,212		
Indirect & Induced	949	\$29,893,120	\$49,703,509	\$90,239,387		
Total	1,429	\$65,892,164	\$135,268,210	\$256,768,599	\$17,863,166	\$16,614,497

Note: totals may not add due to rounding. *Analysis by University of Oregon, Institute for Policy Research and Engagement School of Planning, Public Policy and Management. ** Analysis by FCS GROUP.

Tourism and Recreational Opportunities

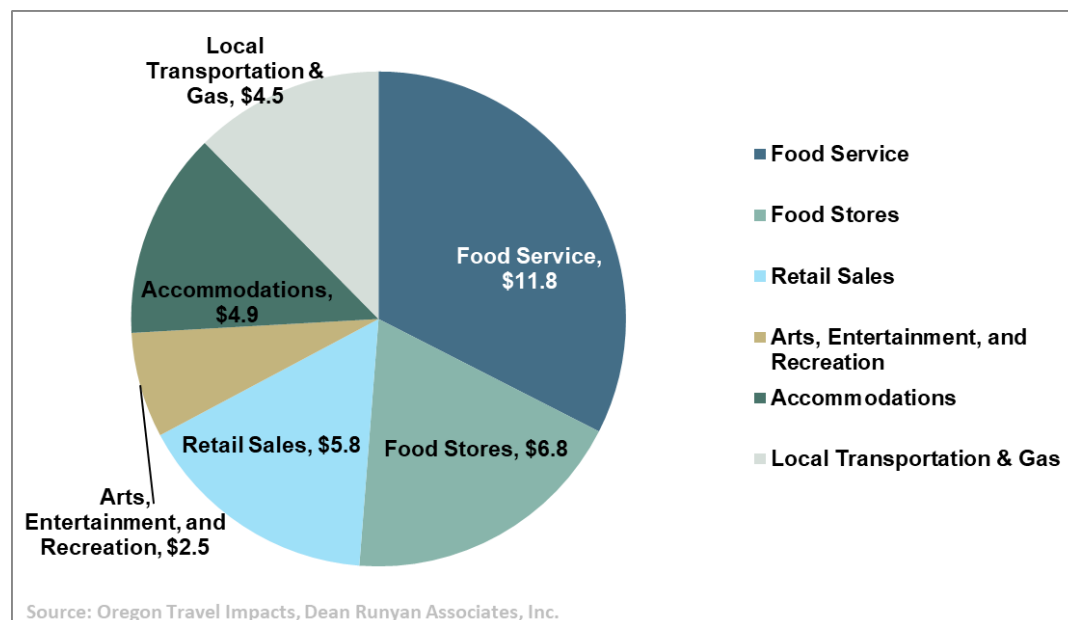
Visitation and tourism play an increasingly important role in supporting the Columbia County economy.

As the population across the western U.S. increases, visitation activity is expected to rise. Visitors are drawn to the area’s many natural attractions, including fishing, hunting, kayaking, biking, camping, bird watching and golf. Recent and planned marina reconstruction and expansion activities at the Scappoose Bay Marina should help promote recreational activities for residents and visitors.

According to a tourism impact study prepared for the Oregon Tourism Commission, annual travel spending in Columbia County amounted to \$36.3 million in 2022, up from \$21.6 million in 2020. Total travel spending increased at an average (AAGR) of 2.2% in Columbia County between 2012-2022.

The sectors that benefit from tourism include food service/restaurants, food & beverage stores, arts, entertainment and recreation, accommodations, and transportation (**Exhibit 9**).

Exhibit 9: Annual Visitation Spending in Columbia County by Retail Type, 2022, in millions



Employment Forecast

As the Portland MSA increases in business activity, the vacant “development ready” industrial-zoned land supply in the tri-county Metro Region is diminishing. This dynamic is likely to create upward pressure on growth in communities located within a 30 to 45-minute commute of Portland, including Scappoose, St. Helens, Columbia City, Rainier, and Vernonia (which is outside the Port district). According to studies by Oregon Metro, the lack of large “development ready” vacant industrial sites within the Portland Metro Region is expected to create a gap in the land needed in the Metro urban growth boundary (UGB) to support the needs of single and multi-tenant industrial users.

A lower and upper range in projected job growth for the Port of Columbia County district has been prepared by considering historic trends, and available job growth forecasts provided by the Oregon Employment Department as well as job growth forecasts that are consistent with the Scappoose Economic Opportunities Analysis (draft January 2023).

The Oregon Economic Development Department job growth forecasts for the Northwest Oregon region (including Benton, Clatsop, Columbia, Lincoln, and Tillamook Counties) are shown in **Exhibit 10**. The Oregon Employment Department expects 12,540 jobs to be added within the region over the next 10 years. This equates to a 12% annual growth rate for the regional job base in Northwest Oregon over the 2021 to 2031 period.

Exhibit 10: Projected Northwest Oregon Job Growth by Sector 2021-2031

Category	2021	2031	Change	% Change
Total employment	100,830	113,370	12,540	12%
Total payroll employment	94,880	107,150	12,270	13%
Total private	75,380	86,580	11,200	15%
Natural resources and mining	3,510	3,700	190	5%
Mining and logging	870	840	-30	-3%
Construction	4,200	4,820	620	15%
Manufacturing	8,800	9,180	380	4%
Durable goods	4,500	4,790	290	6%
Wood product manufacturing	1,100	1,090	-10	-1%
Nondurable goods	4,300	4,390	90	2%
Food manufacturing	1,990	2,240	250	13%
Paper manufacturing	1,230	1,000	-230	-19%
Trade, transportation, and utilities	15,320	16,630	1,310	9%
Wholesale trade	1,060	1,070	10	1%
Retail trade	12,320	13,330	1,010	8%
Transportation, warehousing, and utilities	1,950	2,230	280	14%
Information	960	1,020	60	6%
Financial activities	3,810	3,950	140	4%
Professional and business services	7,550	8,920	1,370	18%
Professional and technical services	3,500	4,250	750	21%
Private educational and health services	13,250	15,370	2,120	16%
Hospitals	4,500	4,880	380	8%
Leisure and hospitality	14,890	19,490	4,600	31%
Accommodation and food services	13,970	18,260	4,290	31%
Accommodation	3,850	5,100	1,250	32%
Food services and drinking places	10,120	13,140	3,020	30%
Other services	3,090	3,500	410	13%
Government	19,500	20,570	1,070	5%
Federal government	1,230	1,220	-10	-1%
State government	1,420	1,490	70	5%
Local government	16,850	17,860	1,010	6%
Local education	10,260	10,600	340	3%
Self-employment	5,950	6,220	270	5%

Source: Oregon Employment Department, published June 13, 2023.

Notes: Northwest Region includes Benton, Clatsop, Columbia, Lincoln, and Tillamook Counties

Additional job growth forecasts within Columbia County were also prepared as part of the City of Scappoose Draft Economic Opportunities Analysis (EOA), January 2023. According to the draft EOA report, Scappoose is expected to add 2,126 jobs between 2023 and 2043 (**Exhibit 11**).

Exhibit 11: Scappoose UGB Employment Growth Forecast, 2023-2043

	2023	2043	Change	AGR 2023- Change
Industrial	820	1,793	973	3.99%
Retail Commercial	824	925	101	0.58%
Office & Services	1,584	2,545	961	2.40%
Government	429	520	91	0.97%
Total	3,657	5,783	2,126	2.32%

Source: January 2023 Draft Scappoose EOA

Abbreviations: AGR = average annual growth rate

These three job growth forecast scenarios are summarized in **Exhibit 12**, and include:

1. Historic Columbia County employment growth rates over the 2010-2022 timeframe.
2. 10-year Oregon Employment Department (OED) job growth forecast for Region 1 (NW Oregon).
3. 20-year Modified Job Growth Forecast for the Scappoose Urban Growth Boundary derived from the draft Scappoose EOA.

The lower and upper job growth rates from these three job growth scenarios have been applied to current employment estimates using Q1 2023 as the base year to derive a long-term job growth forecast for Columbia County (**Exhibit 12**).

Exhibit 12: Columbia County Employment Growth Rate Forecast Scenarios

Sector	2010-2022 Historic Growth	OED Forecast for Region	Scappoose EOA Forecast Draft	Forecast Range	
				Lower Range	Upper Range
Private employment					
Industrial	2.4%	0.7%	4.0%	0.7%	4.0%
Retail trade	1.6%	0.8%	0.6%	0.6%	1.6%
Services	2.5%	1.8%	2.4%	1.8%	2.5%
Government employment	-1.1%	0.5%	1.0%	-1.1%	1.0%

Source: Oregon Employment Department (OED) and 2023 Draft Scappoose EOA

Based on the lower and upper range in employment growth described above, Columbia County is likely to experience significant job growth as long as adequate industrial and commercial sites are provided to meet demand. As shown in **Exhibit 13**, Columbia County is expected to add between 3,751 to 11,479 jobs over the 2023-to-2043 timeframe. The employment sectors that are expected to generate the most job growth from 2023 to 2043 include:

- Industrial (720 to 5,431 jobs), with growth opportunities in durable goods manufacturing, wholesale trade, utilities, and energy research and development.
- Retail Trade (283 to 839 jobs), with growth opportunities in motor vehicle sales, home furnishings, and grocery categories.
- Services (3,208 to 4,724 jobs), with growth opportunities in business and professional services.
- Government (negative 460 to positive 485 jobs), with growth primarily dependent upon increases in local population and household expansion.

Exhibit 13: Columbia County Job Growth Forecast Scenarios, 2023 to 2043

Sector	Total Jobs (Est. 2023)	2043 Lower Scenario	2043 Upper Scenario	Lower Scenario 2023-2043 Change	Upper Scenario 2023-2043 Change
Industrial	4,577	5,298	10,009	720	5,431
Retail	2,307	2,590	3,146	283	839
Services	7,301	10,509	12,024	3,208	4,724
Government	2,288	1,828	2,773	-460	485
Total	16,473	20,224	27,952	3,751	11,479

Source: Oregon Employment Department (OED) and 2023 Draft Scappoose EOA with IMPLAN conversions to total jobs.

Target Industries

A target industries analysis has been prepared for the Port of Columbia County to identify existing and emerging key business sectors. It is a widely accepted theory among economic development professionals that “employment clusters” are a primary force driving local economic prospects and often site selection decisions. Clusters of economic activity go well beyond mere concentrations of industry or employment types. They represent unique competitive market advantages with regard to employment, talent, creativity, entrepreneurship, training and higher education, business costs, and supporting natural resources.

The target industries analysis is used to identify potential business sectors that are most likely to be retained and attracted to Columbia County. The methodology entailed the following steps:

1. Obtaining employment, wage and salary employment data from the Oregon Employment Department for Columbia County and the State of Oregon for the year of 2022.
2. Obtaining 10-year employment growth projections provided by Oregon Employment Department for the Northwest Oregon region (Benton, Clatsop, Columbia, Lincoln, and Tillamook Counties).
3. Conducting a location-quotient (LQ) analysis to evaluate business and industrial clusters in Columbia County relative to the State of Oregon.
4. Evaluating business clusters within Columbia County with regard to the LQ, projected growth rates, economic size of each cluster, and average and aggregate wages.

After these steps were conducted, business clusters were classified into one of four classifications, including:

- **Stars:** include businesses with high LQ (propensity to locate in Columbia County) and higher than average projected growth rate compared to other locations in Oregon.
- **Opportunities:** include businesses with low LQ and high average growth rate (possible pent-up demand or competitive market disadvantage relative to other locations).
- **Mature:** include businesses with high LQ but lower than average growth rate.
- **Challenges:** include businesses with low LQ and lower than average growth rate.

The employment cluster analysis summarized in **Exhibit 14** identifies the business and industrial sectors within Columbia County by their LQ, size (aggregate wages paid annually) and 10-year growth forecast (derived from the Oregon Employment Dept).

The clusters analysis classifies employment sectors in four types:

STARS: Industry Sectors with High LQ/High Growth Potential

- » Leisure and Hospitality (includes hotels/motels and food services)
- » Other Services (such as business to business supply chains)
- » Administrative & Waste Management Services
- » Construction Materials Manufacturing and Services
- » Transportation and Subregional Warehousing

OPPORTUNITIES: Industry Sectors with Low LQ/High Growth Potential

- » Real Estate & Rental
- » Professional-Scientific & Tech Services

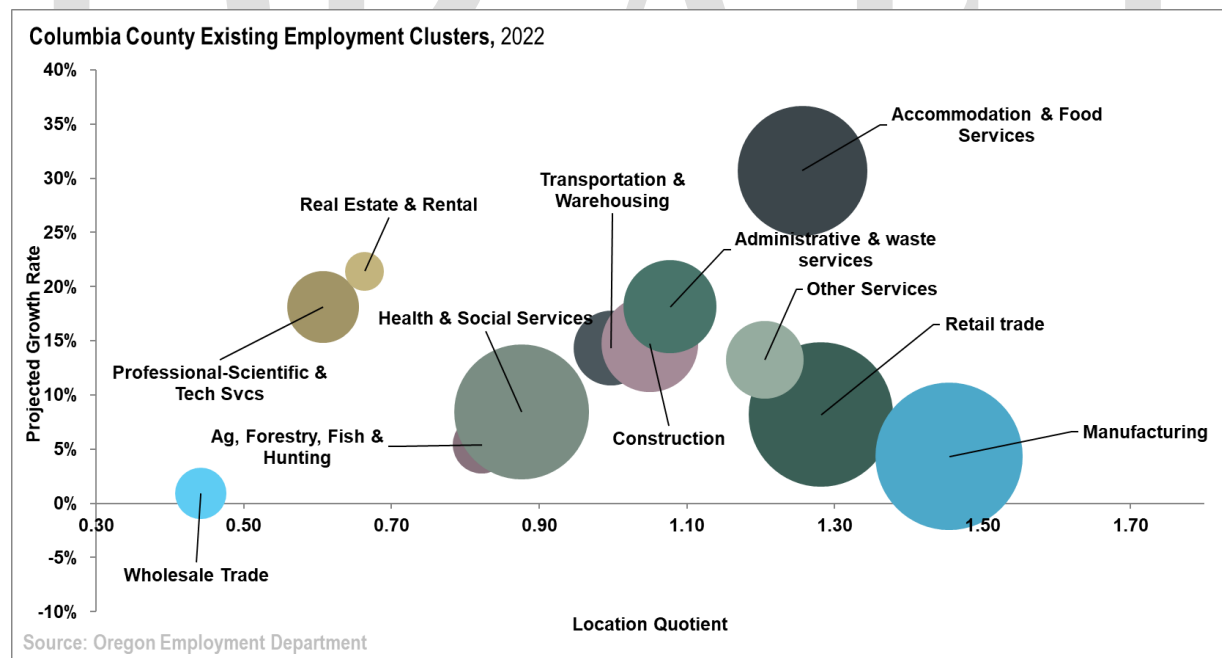
MATURE: Industry Sectors with High LQ/Low Growth Potential

- » Retail Trade
- » Misc. Manufacturing (see detail on next page)

CHALLENGED: Industry Sectors with Low LQ/Low Growth Potential

- » Agriculture, Forestry, Fishing & Hunting
- » Wholesale Trade

Exhibit 14: Columbia County Existing Employment Clusters, 2022

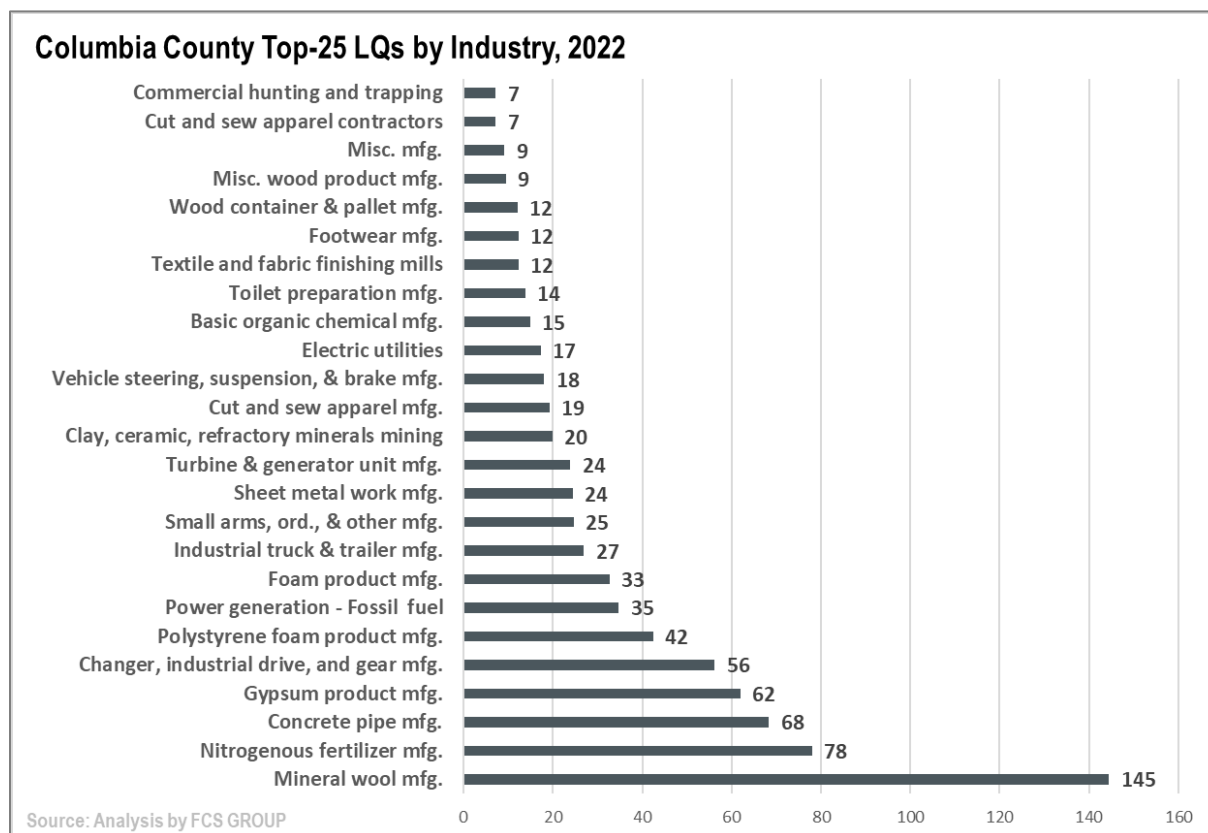


Target Market Opportunities

The industrial clusters within Columbia County can also be compared in terms of key sectors, which depict more detailed information regarding existing sub-clusters that are already concentrated in Columbia County. Please refer to **Exhibit 15** for a graphic depiction of key sectors sorted by LQ

value. Note, any value greater than 1.0 indicates a relatively high propensity to locate in Columbia County.

Exhibit 15: Columbia County Top 25 Industry Sectors Sorted by Location Quotient (LQ)



Consideration of commodity export trends may also help identify prospective industrial activities. Within the list of the top Oregon exports, the commodities and goods that can be produced or shipped from the Port of Columbia County may include:

- » Machinery products (\$6.5 billion)
- » Transportation Equipment (\$4.1 billion)
- » Chemicals (\$3.4 billion)
- » Agricultural Products (\$1.8 billion)

These and other industrial sub-clusters are prime candidates for future marketing efforts by the Port of Columbia County and its local/regional partners.

The recommended target industries for the Port of Columbia County should include, but not be limited to:

- ✓ Power and Energy Production
- ✓ Machinery & Transportation Product Mfg.
- ✓ Building & Construction Materials Mfg.
- ✓ Apparel, Footwear & Textile Product Mfg.

- ✓ Aeronautical & Aviation Products and Testing
- ✓ Marine Products and Testing
- ✓ Wood / Paper Products and Composite Materials Mfg.

In addition to preparing sites for retention and attraction of targeted industrial operations within the Port district, actions that support the incubation of smaller service, with focus on energy and value-added wood and organic product research and development should be considered. Enhancing tourism and visitation through the provision of additional marina slips, boat houses, airport-events and R.V./camping facilities can help generate over-night and day-trip visitation which support multiple commercial sectors throughout Columbia County.

C. PORT DEVELOPMENT PROGRAM

The Port of Columbia County already provides several industrial sites, buildings and facilities that support jobs and visitation and generate a significant share of the annual GDP produced in Columbia County. Over the long-term, as the Oregon and regional population and work force expand, the ability to provide a mix of “development ready” medium and large industrial sites in Columbia County will become increasingly important to the health of the local, regional, and state economies. This is especially the case for heavy industrial operations that are challenged to find adequate sites with rail and barge access for their operations in other parts of the Greater Portland Region.

Columbia County Employment Land Needs

Using job growth projections detailed above and assumptions provided in Appendix A, Columbia County will need between 418 and 776 gross acres of buildable employment land to accommodate future demand over the next 20 years (**Exhibit 16**).

- To accommodate projected industrial job growth, the Port, along with private entities would need to provide between 93 and 137 acres of land for marine and energy related uses.
- Overall land needs for general industrial users is expected to support between 300 and 473 acres of new development.
- An additional 25-166 acres of land area would be required to address commercial opportunities, such as office, lodging, and retail.

A portion of the projected service and retail-related job growth could also be accommodated by redevelopment or adaptive reuse of existing buildings and sites, located in downtown St. Helens, Columbia City, Scappoose, Rainier, and Clatskanie.

Table 16: Long-term Industrial and Commercial Development Program for Columbia County, 2023 to 2043

Land Use Classification	Lower Job Growth Forecast	Upper Job Growth Forecast	Lower Land Need (acres)	Upper Land Need (acres)
Commercial (retail, office, lodging)	903	5,643	25	166
Marine or Energy Related	321	472	93	137
General Industrial & Flex	2,988	4,878	300	473
Total Private	4,211	10,994	418	776

Source: based on analysis provided in Appendix A. Acres expressed as gross buildable land requirements (net of environmental constraints)

APPENDIX A: LOWER DEVELOPMENT FORECAST ASSUMPTIONS

Columbia County Net New 20-year Employment Forecast

	Lower
Retail	720
Services	283
Industrial	3,208
Total	4,211

Source: derived from prior tables.

Employment Sectors to Building Type Assignment Assumptions

Employment Sectors	Building Types						Total
	Office	Marine Related	Flex/Bus. Park	Gen. Industrial	Warehouse	Retail	
Retail	0%		10%	0%	0%	90%	100%
Services	60%		10%	0%	0%	30%	100%
Industrial		10%	30%	60%		0%	100%

Source: reflects local assumptions by FCS GROUP.

Net New Employment Forecast by Building Type, Scenario A Forecast for 20 years

	Office	Marine Related	Flex/Bus. Park	Gen. Industrial	Warehouse	Retail	Total
Retail	-	-	72	-	-	648	720
Services	170	-	28	-	-	85	283
Industrial	-	321	962	1,925	-	-	3,208
Total	170	321	1,063	1,925	-	733	4,211

Building Type to Land Needs Assumptions*

	Office	Marine Related	Flex/Bus. Park	Gen. Industrial	Warehouse	Retail
Refill/Redevelopment Job Allocation ¹	10%	10%	0%	0%	0%	10%
Jobs Needing Vacant Land Allocation ²	70%	80%	90%	70%	100%	75%
Building SF Per Job ²	250	1,250	750	1,250	1,100	500
Floor-Area-Ratio ²	0.35	0.10	0.25	0.20	0.30	0.30
Public Facility Net:Gross Adjustment ³	1.15	1.40	1.15	1.20	1.10	1.15
Work at Home Adjustment ⁴	20%	10%	10%	0%	0%	5%

* assumptions are intended to reflect a long-term average.

1/ Adjusts for building refill & vacancy allowances.

2/ Building density derived from local observations.

3/ Allowances take into account land dedicated to public/utility easements.

4/ Allowance based on local business license data; and is generally consistent with national statistics by US Dept. of Labor, Bureau of Labor Statistics.

Source: assumptions reflect local observations.

Firm Headquarters

Redmond Town Center
7525 166th Ave NE, Ste D-215
Redmond, Washington 98052

Locations

Washington | 425.867.1802
Oregon | 503.841.6543
Colorado | 719.284.9168

Net New Redevelopment Building Space Needs (Floor Area) - 20 year forecast

	Office	Marine Related	Flex/Bus. Park	Gen. Industrial	Warehouse	Retail	Total
Scenario A	3,000	36,000	-	-	-	35,000	74,000

Net New Building Floor Area Development on Vacant Lands (Floor Area) - 20 year forecast

	Office	Marine Related	Flex/Bus. Park	Gen. Industrial	Warehouse	Retail	Total
Scenario A	24,000	289,000	646,000	1,684,000	-	261,000	2,904,000

Vacant Land Need (gross buildable acres) - 20 year forecast

	Office	Marine Related	Flex/Bus. Park	Gen. Industrial	Warehouse	Retail	Total
Scenario A	1.8	92.9	68.2	232.0	-	23.0	417.8

Building to Land Use Assignment Assumptions

Land Use Classification	Office	Marine Related	Flex/Bus. Park	Gen. Industrial	Warehouse	Retail
Commercial (retail, office, lodging)	100%	0%	0%	0%	0%	100%
Port Related Industrial and Public	0%	100%	0%	0%	0%	0%
General Industrial & Flex	0%	0%	100%	100%	100%	0%
Total	100%	100%	100%	100%	100%	100%

Assumptions by FCS GROUP and City staff based on local observations.

Vacant Land Needs Forecast by Zoning Classification, Scenario A 20 year forecast

Land Use Classification	Office	Energy Related	Flex/Bus. Park	Gen. Industrial	Warehouse	Retail	Total
Commercial (retail, office, lodging)	1.8	-	-	-	-	23.0	24.8
Marine or Energy Related	-	92.9	-	-	-	-	92.9
General Industrial & Flex	-	-	68.2	232.0	-	-	300.2
Total	1.8	92.9	68.2	232.0	-	23.0	417.8

Columbia County Land Need (gross buildable acres)

Land Use Classification	Scenario A
Commercial (retail, office, lodging)	24.8
Marine or Energy Related	92.9
General Industrial & Flex	300.2
Total	417.8

Assumptions by FCS GROUP based on above listed assumptions and local observations.

APPENDIX B: UPPER DEVELOPMENT FORECAST ASSUMPTIONS

Columbia County 20-year Net New Employment Forecast

	Upper
Retail	5,431
Services	839
Industrial	4,724
Total	10,994

Source: derived from prior tables.

Employment Sectors to Building Type Assignment Assumptions

Employment Sectors	Building Types					Total
	Office	Marine Related	Flex/Bus. Park	Gen. Industrial	Retail	
Retail	0%		10%	0%	90%	100%
Services	60%		10%	0%	30%	100%
Industrial		10%	30%	60%	0%	100%

Source: reflects local assumptions by FCS GROUP.

Net New Employment Forecast by Building Type, Scenario B Forecast for 20 years

	Office	Marine Related	Flex/Bus. Park	Gen. Industrial	Retail	Total
Retail	-	-	543	-	4,888	5,431
Services	503	-	84	-	252	839
Industrial	-	472	1,417	2,834	-	4,724
Total	503	472	2,044	2,834	5,140	10,994

Building Type to Land Needs Assumptions*

	Office	Marine Related	Flex/Bus. Park	Gen. Industrial	Retail
Refill/Redevelopment Job Allocation ¹	10%	10%	0%	0%	10%
Jobs Needing Vacant Land Allocation ²	70%	80%	90%	70%	75%
Building SF Per Job ²	250	1,250	750	1,250	500
Floor-Area-Ratio ²	0.35	0.10	0.25	0.20	0.30
Public Facility Net.Gross Adjustment ³	1.15	1.40	1.15	1.20	1.15
Work at Home Adjustment ⁴	20%	10%	10%	0%	5%

* assumptions are intended to reflect a long-term average.

1/ Adjusts for building refill & vacancy allowances.

2/ Building density derived from local observations.

3/ Allowances take into account land dedicated to public/utility easements.

4/ Allowance based on local business license data; and is generally consistent with national statistics by US Dept. of Labor, Bureau of Labor Statistics.

Source: assumptions reflect local observations.

Net New Redevelopment Building Space Needs (Floor Area) - 20 year forecast

	Office	Marine Related	Flex/Bus. Park	Gen. Industrial	Retail	Total
Scenario B	10,000	53,000	-	-	244,000	307,000

Net New Building Floor Area Development on Vacant Lands (Floor Area) - 20 year forecast

	Office	Marine Related	Flex/Bus. Park	Gen. Industrial	Retail	Total
Scenario B	70,000	425,000	1,242,000	2,480,000	1,831,000	6,048,000

Vacant Land Need (gross buildable acres) - 20 year forecast

	Office	Marine Related	Flex/Bus. Park	Gen. Industrial	Retail	Total
Scenario A	5.3	136.6	131.2	341.6	161.1	775.8

Building to Land Use Assignment Assumptions

Land Use Classification	Office	Marine Related	Flex/Bus. Park	Gen. Industrial	Retail
Commercial (retail, office, lodging)	100%	0%	0%	0%	100%
Port Related Industrial and Public	0%	100%	0%	0%	0%
General Industrial & Flex	0%	0%	100%	100%	0%
Total	100%	100%	100%	100%	100%

Assumptions by FCS GROUP and City staff based on local observations.

Vacant Land Needs Forecast by Zoning Classification, Scenario A 20 year forecast

Land Use Classification	Office	Marine Related	Flex/Bus. Park	Gen. Industrial	Retail	Total
Commercial (retail, office, lodging)	5.3	-	-	-	161.1	166.4
Port-Related Industrial and Public	-	136.6	-	-	-	136.6
General Industrial & Flex	-	-	131.2	341.6	-	472.8
Total	5.3	136.6	131.2	341.6	161.1	775.8

Columbia County Land Need (gross buildable acres)

Land Use Classification	Scenario B
Commercial (retail, office, lodging)	166.4
Mixed Use	-
Marine or Energy Related	136.6
General Industrial & Flex	472.8
Total	775.8

Assumptions by FCS GROUP based on above listed assumptions and local observations.

Port of Columbia County,
Strategic Business Plan

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PORT OF COLUMBIA COUNTY 2024 STRATEGIC BUSINESS PLAN UPDATE

APPENDIX D Financial Plan

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FINANCIAL PLAN

This financial plan for the Port of Columbia County contains the elements required by item 9(d) of the “Strategic Business Plan Template” in *Ports 2010: A New Strategic Business Plan for Oregon’s Statewide Port System* (<https://www.oregon.gov/biz/Publications/Ports/2010PortPlan.pdf>).

A HISTORICAL DATA

A.1 Fund Structure

The Port of Columbia County budgeting methodology allocates expenditures by five object classifications within six programs, as demonstrated in **Exhibit 1** below.

Exhibit 1: Expenditure Programs and Classifications

Departmental Program	Object Classification
Executive Department	Personnel Services
Business Development & External Communications	Materials and Services
Finance Administration	Capital Outlay
Facility & Property Management	Debt Service
Terminal Services	Contingency
Non-Departmental	

A.2 Recent Financial Performance

The foundation of this plan is the Port’s historical financial performance. **Exhibits 2 and 3** summarize five years of resources and expenses for the Port, respectively. Obtained from the Port’s FYE 2024 budget, this data summarizes actuals for the fiscal years spanning 2019 through 2022, and budgeted values for FYEs 2023 and 2024. All departments listed above are summarized within these tables.

Exhibit 2: Revenues from FYE 2020 Through FYE 2024

Revenues

Category	Actuals			Revised	Adopted
	FYE '20	FYE '21	FYE '22	FYE '23	FYE '24
Beginning Fund Balance	\$ 5,217,845	\$ 6,383,184	\$ 7,370,256	\$ 7,232,354	\$ 8,092,245
Revenue					
Property Taxes	\$ 393,806	\$ 26,906	\$ 14,945	\$ -	\$ 10,000
Licenses	509,911	504,177	575,194	563,935	608,143
Rents and Reimbursements	4,132,185	4,188,206	5,249,784	6,034,345	5,539,531
Terminal Services	562,234	408,492	577,512	411,202	718,925
Marina & RV Park	185,729	267,384	236,121	251,923	264,568
Miscellaneous Revenue	643,581	31,176	488,519	28,853	30,000
Total Revenue	\$ 6,427,446	\$ 5,426,341	\$ 7,142,075	\$ 7,290,258	\$ 7,171,167
Other Resources					
Grants	\$ 253,719	\$ 209,855	\$ 252,377	\$ 394,627	\$ 400,000
Loans	1,420,000	2,010,309	-	-	400,000
Interest	231,181	201,248	132,316	38,036	200,000
Total Other Resources	\$ 1,904,900	\$ 2,421,412	\$ 384,693	\$ 432,663	\$ 1,000,000
Total Resources	\$ 13,550,191	\$ 14,230,937	\$ 14,897,024	\$ 14,955,276	\$ 16,263,413

Note, ending resources may not equate to beginning resources due to end of year accounting adjustments.

Source: Port of Columbia County, financial reports and current budget documents.

Exhibit 3: Expenditures from FYE 2020 Through FYE 2024

All Department Expenses

Category	Actuals			Revised	Adopted
	FYE '20	FYE '21	FYE '22	FYE '23	FYE '24
FTEs	14	16.5	17.5	20	20
O&M Expenses					
Personnel Services	\$ 1,607,873	\$ 1,745,011	\$ 1,847,130	\$ 2,177,364	\$ 2,824,265
Materials & Services	1,569,776	1,808,463	1,724,286	2,037,780	2,295,741
O&M Total	\$ 3,177,649	\$ 3,553,474	\$ 3,571,416	\$ 4,215,144	\$ 5,120,006
Resources Net of O&M	\$ 10,372,542	\$ 10,677,463	\$ 11,325,608	\$ 10,740,132	\$ 11,143,407
Debt					
Principal	\$ 598,552	\$ 655,324	\$ 622,077	\$ 609,700	\$ 325,139
Interest	541,278	556,635	568,913	496,982	460,525
Debt Total	\$ 1,139,830	\$ 1,211,959	\$ 1,190,990	\$ 1,106,682	\$ 785,664
Resources After O&M and Debt	\$ 9,232,712	\$ 9,465,504	\$ 10,134,618	\$ 9,633,450	\$ 10,357,743
Capital Outlays*					
Land	\$ -	\$ -	\$ -	\$ -	\$ -
Buildings	2,325,606	2,055,748	-	2,850,000	2,850,000
Improvements	25,435	-	620,772	3,080,000	4,175,000
Machinery and Equipment	66,346	39,500	7,500	135,000	135,000
Vehicles	-	-	-	-	-
Infrastructure	432,141	-	-	135,000	135,000
Capital Total	\$ 2,849,528	\$ 2,095,248	\$ 628,272	\$ 6,200,000	\$ 7,295,000
Total Budget	\$ 7,167,007	\$ 6,860,681	\$ 5,390,678	\$ 11,521,826	\$ 13,200,670
Ending Resources	\$ 6,383,184	\$ 7,370,256	\$ 9,506,346	\$ 3,433,450	\$ 3,062,743

*Includes both Terminal Services and Facility and Property Management Department expenditures.

Note, ending resources may not equate to beginning resources due to end of year accounting adjustments.

Source: Port of Columbia County, financial reports and current budget documents.

Exhibit 4 summarizes the Port’s balance sheet for the past three fiscal years. These figures are taken directly from the Port’s audit reports.

Exhibit 4: Ending Net Assets from FYE 2020 through FYE 2022

Category	June 30, 2020	June 30, 2021	June 30, 2022	Annual Growth Rate*
Assets				
Current Assets	\$6,675,650	\$7,534,535	\$8,594,734	13.5%
Noncurrent Assets				
Capital Assets				
Depreciable Capital Assets	\$58,347,490	\$63,223,803	\$63,450,697	
Non-Depreciable Capital Assets	14,187,462	11,406,395	11,807,769	
Accumulated Depreciation	<u>(27,470,892)</u>	<u>(29,653,961)</u>	<u>(31,870,002)</u>	
Total Capital Assets	\$45,064,060	\$44,976,237	\$43,388,464	
Other Long-Term Assets	<u>8,702,038</u>	<u>8,215,750</u>	<u>7,638,270</u>	
Total Noncurrent Assets	\$53,766,098	\$53,191,987	\$51,026,734	
Deferred Outflows	171,647	439,963	345,246	
Total Assets	\$60,613,395	\$61,166,485	\$59,966,714	-0.5%
Liabilities and Net Assets				
Liabilities				
Current Liabilities	\$1,903,077	\$2,031,121	\$2,521,074	
Noncurrent Liabilities	11,132,362	12,902,804	11,783,864	
Deferred Inflows	<u>117,980</u>	<u>76,330</u>	<u>404,159</u>	
Total Liabilities	\$13,153,419	\$15,010,255	\$14,709,097	5.7%
Net Assets				
Investment in Capital Assets, Net of Related Debt	\$33,700,995	\$40,467,385	\$31,344,435	
Unrestricted	13,419,709	5,427,508	13,650,406	
Restricted for Debt Payments	<u>339,272</u>	<u>261,337</u>	<u>262,776</u>	
Total Net Assets	\$47,459,976	\$46,156,230	\$45,257,617	-2.3%
Total Liabilities and Net Assets	\$60,613,395	\$61,166,485	\$59,966,714	-0.5%

Source: Port of Columbia County 2023-2024 Adopted Budget

B ANALYSIS OF FINANCIAL CONDITION

This section of the financial plan analyzes the Port’s historical data with the goals of:

- (1) highlighting issues for the Port’s consideration and
- (2) developing accurate projections for future years.

B.1 Operating Cash Flow

This subsection analyzes the Port’s operating (non-capital) costs and the revenues used to recover those costs.

B.1.a Trend

Operating revenues are accounted in the General Fund and Revenue Fund. In FYE 2023, lease payments from tenants (\$6,034,345) represented 83 percent of total operating revenues (\$7,290,258). In that same year, the Port collected no property taxes, due to the Port Commission’s decision to impose a \$0.00 property tax rate in recent years.

In FYE 2023, expenditures for personal services (\$2,177,364) and materials and services (\$2,037,780) represented 53 percent of total operating expenses. These expenditures include operation and maintenance of Port facilities, as well as general administration.

As shown in **Exhibit 5**, operating expenditures have been increasing faster than revenues over the past three fiscal years. Continuation of this trend is not sustainable and would limit the level of capital investment the port can undertake in the future.

Exhibit 5: Operating Cash Flow from FYE 2020 through FYE 2023

Category	Actuals			Revised	Growth Rate	
	FYE '20	FYE '21	FYE '22	FYE '23	Actuals Only	All Years
Operating Revenues						
Rents and Reimbursements	\$4,132,185	\$4,188,206	\$5,249,784	\$6,034,345	12.71%	13.45%
Licenses	509,911	504,177	575,194	563,935	6.21%	3.41%
Terminal Services	562,234	408,492	577,512	411,202	1.35%	-9.90%
Miscellaneous Revenue	643,581	31,176	488,519	28,853	-12.88%	-64.48%
Marina & RV Park	185,729	267,384	236,121	251,923	12.75%	10.70%
Property Taxes	393,806	26,906	14,945	-	n/a	-n/a
Total Operating Revenue	\$6,427,446	\$5,426,341	\$7,142,075	\$7,290,258	5.41%	4.29%
Operating Expenditures	\$3,177,649	\$3,553,474	\$3,571,416	\$4,215,144	6.01%	9.88%
Revenues less expenditure	\$3,249,797	\$1,872,867	\$3,570,659	\$3,075,114	4.82%	-1.82%

Source: Exhibit 2 and Exhibit 3 above

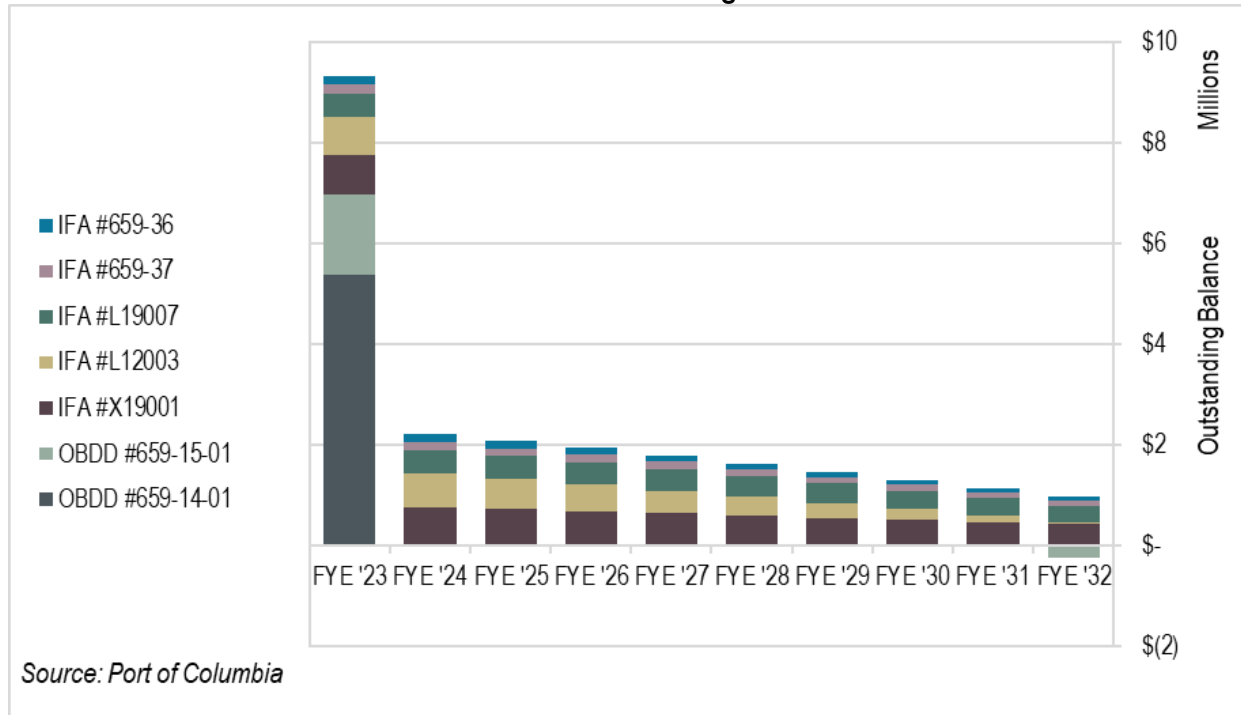
B.2 Debt

This subsection analyzes the Port's current and potential use of debt.

B.2.a Current Debt

As of June 30, 2024, the Port is projected to have approximately \$2.3 million in long-term debt or note obligations. In light of the fact that some of this "debt" is serviced through tax increment revenue, it is not necessary a long-term risk or obligation of the Port. **Exhibit 6** shows the amortization of this outstanding debt over the next five years.

Exhibit 6: Amortization of Long-Term Debt



The two largest debts, OBDD #659-15-01 and OBDD #659-14-01, were fully amortized in 2023 and will have zero balance in 2024. For these loans, the Port had agreements with both the Columbia County Development Agency (CCDA) and the Port Westward tenant who uses rail to make debt service payments from tax increment or tenant revenue. **Exhibit 6** shows the Port’s projected potential debt service responsibilities for the 10 years (FYE 2023-FYE 2032).

B.2.b General Obligation Debt Capacity

ORS 777.410 allows ports, with authorization from their electors, to issue general obligation bonds backed by a bond levy on the property tax roll. At any one time, the outstanding balance of general obligation bonds cannot exceed 2.5 percent of the real market value of all taxable property within the port. According to the Columbia County Assessor, the real market value of all taxable property within the Port of Columbia County boundary is estimated at \$6.3 billion in the current fiscal year. This represents a general obligation debt capacity of \$158.5 million. With only \$2.2 million in debt outstanding, the Port is utilizing about 1.4% of this total debt capacity (**Exhibit 7**).

Exhibit 7:

Port of Columbia County Statutory Authority for Generating Obligation Indebtedness

	Calculation
Total Taxable AV, FY 2023-24	\$ 5,514,210,157
RMV to AV Ratio	1.15
Estimated Real Market Value, 2023	\$ 6,341,341,681
Statutory Capacity Tax Levy Rate (per ORS 777.430)	0.25%
Statutory Annual Capacity based on max tax levy	\$ 15,853,354
Statutory Capacity with Voter Approval (per ORS 777.410)	2.50%
Total Statutory Debt Capacity based on voter approval	\$ 158,533,542
Proj. Capacity Used (as of 6.30.2024)	\$ 2,208,606
Debt Capacity Remaining per ORS 777.410	\$ 156,324,936

B.3 Working Capital

This subsection analyzes the Port’s solvency.

B.3.a Trend

As shown in **Exhibit 8**, the Port has maintained unrestricted current assets well in excess of current liabilities.

Exhibit 8: Working Capital for FYE 2020 through FYE 2022

Category	June 30, 2020	June 30, 2021	June 30, 2022
Current Assets	\$ 6,675,650	\$ 7,534,535	\$ 8,594,734
<i>less restricted current assets</i>	<i>(339,272)</i>	<i>(261,337)</i>	<i>(262,776)</i>
Unrestricted Current Assets	\$ 6,336,378	\$ 7,273,198	\$ 8,331,958
<i>less current liabilities</i>	<i>(1,903,077)</i>	<i>(2,031,121)</i>	<i>(2,521,074)</i>
Net Working Capital	\$ 4,433,301	\$ 5,242,077	\$ 5,810,884
Current Ratio	3.33	3.58	3.30

Source: Port Budget documents.

D PROJECTIONS

This section of the financial plan uses the analysis above to project resources and requirements into the future.

D.1 Key Assumptions

The projections that follow in **Exhibit 9** are based on the following assumptions:

1. Recommendations in Section E are implemented.
2. A bond debt service coverage ratio of 1.20 is maintained.
3. Debt service that is eligible for tax increment revenue by intergovernmental agreement will be paid fully from that dedicated revenue source.
4. Only expenditures in the personal services and materials and services categories are considered operating expenses for bond covenant purposes.
5. Base case scenario assumes that revenues from property taxes will remain at or near zero. In the event that additional debt is issued, it is recommended that the Port reauthorize the permanent property tax rate and adjust the revenue forecast.
6. Both operating expenditures (found only in the General Fund) and tenant rent (in the Revenue Fund) will grow by 2.5 to 2.8 percent per year. This represents the compound annual growth rate for lease revenues from FYE 2020 to (estimated) FYE 2024.
7. The General Fund will maintain an ending fund balance of at least \$2.0 million, which is consistent with current Port reserve policy guidelines.
8. Base case scenario evaluates the level of funding that is available after the Port addresses its operating expenses. Hence, no additional debt is assumed to occur during the 10-year forecast period. Instead, in the event that additional debt is issued, it is recommended that the Port reauthorize the permanent property tax rate and adjust the revenue forecast.
9. Monies that are still available each year after satisfying the assumptions above are transferred to the Capital Improvement Fund for use in capital projects.

Altering any of these assumptions could materially impact the projections.

D.2 Resources and Requirements

Exhibit 9 provides a forecast of Port resources and requirements for 10 years.

These findings reflect the following conclusions:

- **The Port's revenues are on track to cover its remaining debt and anticipated operating expenditures and yield adequate fund balances that could support approximately \$20 million in additional capital project expenditures over the next 10 years** (equates to approx. \$4 million every five years) with pay-as-you-go funding.
- The Port could consider taking on additional debt to further increase capital facility investments, if needed. When possible, consider local partnerships with cities and Columbia County to utilize tax increment financing (TIF) through formation of Urban Renewal Districts and state infrastructure loans to provide a dedicated source of financing and funding for long-term debt.

E POLICY RECOMMENDATIONS

This section of the financial plan provides policy recommendations based on this financial analysis.

The Port of Columbia County compares favorably to other Oregon ports with regard to most of the financial analysis metrics, including:

- Higher than average operating revenue expense coverage
- Lower than average dependency upon property tax as percentage of operating revenue
- Lower than average debt-to-equity ratios
- Lower than average current ratios (ratio of unrestricted current assets to current liabilities)
- Bond service debt coverage ratios (based on current debt obligations) are projected to be well above the minimum amount of 1.25 required by current bond covenants.

While these are positive indicators, the long-term fiscal sustainability of the Port is of concern if operating expenditures continue to grow at a faster pace than revenues.

Without a supplemental source of funding through permanent property tax revenues, there is also a risk to the Port in the event that one or more of its large lease hold tenants cease or scale back operations.

If revenues can be adjusted to increase at the same pace of operating expenses, the 10-year financial forecast included as **Exhibit 9** indicates that a target General Fund ending year balance of \$2 million could likely be achieved along with surplus fund balances that could be applied to reserves for capital projects or dedicated reserves.

Exhibit 9: Financial Projections for FY 2011-12 through FY 2015-16
(Source: FCS GROUP and Port of Columbia County staff, November 2023)

Revenues

Category	Adopted	Forecast									Growth Rate
	FYE '24	FYE '25	FYE '26	FYE '27	FYE '28	FYE '29	FYE '30	FYE '31	FYE '32	Calculated	
Beginning Fund Balance	\$ 8,092,245	\$ 3,062,743	\$ 5,147,663	\$ 7,287,111	\$ 9,483,939	\$ 11,728,379	\$ 14,039,356	\$ 16,423,669	\$ 18,872,298		
Revenue											
Property Taxes	\$ 10,000	\$ 3,992	\$ 1,594	\$ 636	\$ 254	\$ 101	\$ 40	\$ 16	\$ 6	-60.1%	
Licenses	608,143	623,217	638,664	654,494	670,717	687,342	704,378	721,837	739,729	2.5%	
Rents and Reimbursements	5,539,531	5,676,836	5,817,545	5,961,742	6,109,512	6,260,946	6,416,133	6,575,166	6,738,141	2.5%	
Terminal Services	718,925	736,745	755,006	773,720	792,898	812,551	832,691	853,331	874,482	2.5%	
Marina & RV Park	264,568	271,126	277,846	284,733	291,790	299,023	306,434	314,030	321,814	2.5%	
Miscellaneous Revenue	30,000	30,744	31,506	32,287	33,087	33,907	34,747	35,609	36,491	2.5%	
Total Revenue	\$ 7,171,167	\$ 7,342,659	\$ 7,522,160	\$ 7,707,611	\$ 7,898,258	\$ 8,093,869	\$ 8,294,424	\$ 8,499,989	\$ 8,710,663	2.5%	
Other Resources											
Grants	\$ 400,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Loans	400,000	-	-	-	-	-	-	-	-		
Interest	200,000	204,957	210,037	215,244	220,579	226,046	231,649	237,391	243,275	2.5%	
Total Other Resources	\$ 1,000,000	\$ 204,957	\$ 210,037	\$ 215,244	\$ 220,579	\$ 226,046	\$ 231,649	\$ 237,391	\$ 243,275	2.5%	
Total Resources	\$ 16,263,413	\$ 10,610,359	\$ 12,879,861	\$ 15,209,966	\$ 17,602,776	\$ 20,048,294	\$ 22,565,430	\$ 25,161,048	\$ 27,826,236	14.8%	

Note, ending resources may not equate to beginning resources due to end of year accounting adjustments.

Category	Adopted	Forecast									Growth Rate
	FYE '24	FYE '25	FYE '26	FYE '27	FYE '28	FYE '29	FYE '30	FYE '31	FYE '32	Calculated	
	20										
O&M Expenses											
Personnel Services	\$ 2,824,265	\$ 2,894,269	\$ 2,966,007	\$ 3,039,524	\$ 3,114,863	\$ 3,192,070	\$ 3,271,190	\$ 3,352,271	\$ 3,435,362	2.5%	
Materials & Services	2,295,741	2,352,644	2,410,958	2,470,717	2,531,958	2,594,716	2,659,030	2,724,938	2,792,479	2.5%	
O&M Total	\$ 5,120,006	\$ 5,246,913	\$ 5,376,965	\$ 5,510,242	\$ 5,646,821	\$ 5,786,786	\$ 5,930,220	\$ 6,077,209	\$ 6,227,842	2.5%	
Resources Net of O&M	\$ 11,143,407	\$ 5,363,446	\$ 7,502,896	\$ 9,699,724	\$ 11,955,955	\$ 14,261,508	\$ 16,635,210	\$ 19,083,839	\$ 21,598,394	22.0%	
Debt											
Principal	\$ 325,139	\$ 135,338	\$ 140,409	\$ 145,670	\$ 162,848	\$ 163,232	\$ 158,645	\$ 164,524	\$ 400,640	16.8%	
Interest	460,525	80,445	75,376	70,115	64,728	58,920	52,896	47,017	40,918	-9.2%	
Debt Total	\$ 785,664	\$ 215,783	\$ 215,785	\$ 215,785	\$ 227,576	\$ 222,152	\$ 211,541	\$ 211,541	\$ 441,559	10.8%	
Resources After O&M and Debt	\$ 10,357,743	\$ 5,147,663	\$ 7,287,111	\$ 9,483,939	\$ 11,728,379	\$ 14,039,356	\$ 16,423,669	\$ 18,872,298	\$ 21,156,835	22.4%	
Capital Outlays*											
Land	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Buildings	2,850,000	-	-	-	-	-	-	-	-		
Improvements	4,175,000	-	-	-	-	-	-	-	-		
Machinery and Equipment	135,000	-	-	-	-	-	-	-	-		
Vehicles	-	-	-	-	-	-	-	-	-		
Infrastructure	135,000	-	-	-	-	-	-	-	-		
Capital Total	\$ 7,295,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Total Budget	\$ 13,200,670	\$ 5,462,696	\$ 5,592,750	\$ 5,726,027	\$ 5,874,397	\$ 6,008,938	\$ 6,141,761	\$ 6,288,750	\$ 6,669,401	2.9%	
Ending Resources	\$ 3,062,743	\$ 5,147,663	\$ 7,287,111	\$ 9,483,939	\$ 11,728,379	\$ 14,039,356	\$ 16,423,669	\$ 18,872,298	\$ 21,156,835	22.4%	

*Includes both Terminal Services and Facility and Property Management Department expenditures.

Note, ending resources may not equate to beginning resources due to end of year accounting adjustments.

Financial Policy Considerations

It is recommended that the Port continue to implement sound financial management practices using consistent policy benchmarks and techniques which should include the following financial policies (FP).

FP.1 Minimum Reserve Policy

The Port has a \$2M minimum ending fund balance policy guideline. If fund balances dip below this level, it is recommended that the Port adopt a Minimum Operating Reserve Policy. Minimum Operating Reserve is defined as unrestricted cash reserves in an amount at least 1.5 times the annual maintenance and operation costs. The definition of annual maintenance and operation costs, as applied to the Port's financial statements, is equal to Operating Expenses net of depreciation. At June 30, 2022, unrestricted cash reserves were 2.0 times Operating Expenses net of depreciation.

FP.2 Debt Service Coverage Ratio

The DSCR is the annual Net Revenues (defined as operating income plus depreciation, interest income and nonoperating income) share of long-term bonded debt. It is recommended that the Port target an amount equal to at least 120% of the annual debt service requirement each fiscal year, through final maturities of the Bonds or early retirement of the Bonds, whichever first occurs. At June 30, 2022, the Port's DSCR exceeded 3.30.

FP.3 Contingent Liabilities and Asset Replacement Reserves

As a major property owner/manager with significant land, building and infrastructure holdings, the Port will at time be responsible for unforeseeable capital investments related to asset replacement and environmental remediation. Unknown environmental liabilities and permitting costs could increase Port expenditures for Port-owned sites with documented contamination, as well as the cost of National Pollutant Discharge Elimination System (NPDES) and other required permitting activities. Hence, the Port could opt to create a new "asset/emergency capital reserve" fund within the Capital Improvement Fund that could be used for asset replacement and environmental activities, such as site remediation and permitting. A new financial policy could be created with allocation of between 5% and 10% of year-end fund balances up to a maximum level (e.g. \$5M) established by the Port Commission.

FP.4 Pursue External Funding Sources

While the Port has the potential to issue voter-approved general obligation bonds for new capital projects, that option is not required. Instead, it is recommended that the Port continue to strategically pursue external funding sources to improve infrastructure and port assets. A sample of grant programs include:

- Oregon Ports Revolving Loan Program
- Oregon DEQ Brownfields Redevelopment Fund and Cleanup Fund
- Oregon DEQ Solid Waste Orphan Site Program
- Oregon Water/Wastewater Financing Program
- Oregon Special Public Works Fund
- Federal Aviation Administration, Infrastructure Development Grant Program
- U.S. Community Development Block Grant Program
- U.S. Maritime Navigation Improvement Fund
- U.S. Dept. of Transportation BUILD and INFRA Grant Program
- US. DOT Small Shipyard Grant Program
- U.S. Dept. of Agriculture Rural Development Loan and Grant Program