



Port of The Dalles Strategic Business Plan

Volume 2. Plan | October 2013



Thanks to the Port of The Dalles, its stakeholders, and community partners for sharing their time and insight in the development of this Strategic Business Plan.

Acknowledgements:

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and insight in the development of this strategic business plan.

Please see also *Volume 1. Strategy*

**The Port of The Dalles
Strategic Business Plan**

TABLE OF CONTENTS

	PAGE
I. Port History	1
II. Port Mission, Vision, and Goals.....	2
III. Strategic Plan Development Process.....	3
IV. Port Overview and Description.....	4
A. Sites and Facilities	4
Marina	4
Port Offices	5
North Chenoweth Business Park	6
B. Accomplishments	6
C. Industrial and Commercial Properties	7
D. Zoning	8
The City of The Dalles.....	8
Dufur	10
E. Commission	10
F. Staff.....	10
G. Market Conditions	10
H. Local and Regional Partners.....	11
V. Defining the Problem and Opportunity	12
A. District Demographic Profile	12
B. District Economic Profile	13
C. Trends for Regional, State, and National Key Industries	14
The Port’s Direct Impact on Jobs	16
District Needs	16
Community Role	16
VI. Policy Context.....	17
A. Planning and Environmental Policy Compliance Issues	17
Statewide Planning Goals.....	18
Local and Regional Plans	18
VII. Situational Analysis	21
A. Identify Strengths, Weaknesses, Opportunities, and Threats.....	21
B. Critical Issues.....	22
C. Demand Analysis.....	22
D. Port Industrial Opportunity Sites	23
E. Risk Analysis	26

VIII.	Strategic Business Plan	27
	A. Management Plan	27
	B. Financial Plan	28
	C. Capital Facilities Plan	28
	D. Environmental Plan.....	30
	E. Marketing Plan	30
IX.	Implementation plan.....	31
	A. Action Plan	31
	B. Plan Update.....	31

LIST OF FIGURES

Figure 1 - Port of The Dalles Marina.....	4
Figure 2 - Port of The Dalles Office Facilities.....	5
Figure 3 - North Chenoweth Business Park Concept Plan	6
Figure 4 - Wasco County Employment Trends, 2001-2011.....	15
Figure 5 - Port of The Dalles Industrial Opportunity Sites	24
Figure 6 - North Chenoweth Business Park Development Concept	25

LIST OF TABLES

Table 1 - Port of The Dalles Industrial Area Zones – Permitted Uses	8
Table 2 - Port of The Dalles Industrial Area Zones – Conditional Uses.....	10
Table 3 - Port of The Dalles Organizational Partners.....	11
Table 4 - Population Trends.....	12
Table 5 - Income Trends	13
Table 6 - Estimated Employment in Wasco County, 2012	15
Table 7 - Port of The Dalles SWOT Analysis	21
Table 8 - Project and Policy Risks	26
Table 9 - Capital Facilities Plan	29

LIST OF APPENDICES

- Appendix A - Maps**
- Appendix B - Public Outreach Summary**
- Appendix C - Facility Condition Assessment**
- Appendix D - FCS GROUP Market Analysis**
- Appendix E - Financial Plan**

PORT OF THE DALLES STRATEGIC BUSINESS PLAN

I. PORT HISTORY

This chapter provides a brief overview of the Port of The Dalles (Port) in context with the surrounding area.

Wasco County

Wasco County is located in north-central Oregon and is named for its original inhabitants, the Wascopam Tribe that lived south of the Columbia River. Though Native American trade took place in the area for at least 10,000 years, the county was not established until 1854. The Columbia River served as a gathering place and major trading center for many Native Americans. Today, Wasco County (County) continues to be a major transportation hub for river and inland traffic. Its economy is based on agriculture, manufacturing, electric power, transportation, and tourism.¹

The Dalles

The City of The Dalles (City) has served as a regional trade center along the Columbia River, and at one time was a major trading center for Native Americans. According to the Oregon Historical County Records Guide, in the 1800s, European settlers arrived to the area as a stop along the Oregon Trail. In 1854, Europeans settled permanently to the area, which was eventually designated a county seat for Wasco County. The City of The Dalles became a regional trade center and a hub for river, rail, and road transportation. Today, The Dalles continues to remain a trading hub for the Mid-Columbia region.

The Port of The Dalles

Under Oregon Revised Statutes (ORS) Chapter 777, ports are designated as special districts in the State of Oregon. 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. The Port is an Oregon special district that works to create jobs and recruit businesses by developing industrial lands. It is located on the south bank of the Columbia River and was established in 1933. The terrain includes significant land and low elevations, with some steep topography associated with the Cascades. People have lived in the area for at least ten thousand years, though European settlers began arriving during the 19th Century. The Dalles Dam was completed in 1960, leading the Port to become a stopping point for vessels from the Pacific Ocean carrying fruit, grain, lumber, wool, meat, and oil. Today, small cities, good schools, relatively inexpensive land/rent levels, and convenient access to the mid-Columbia River Gorge labor markets make the area a favorable location for residents and businesses (see Appendix A, Maps).

¹ "Wasco County History." *Oregon Historical County Records Guide*. Oregon State Archives, n.d. Web. 15 Jan. 2013.

II. **PORT MISSION, VISION, AND GOALS**

The Port's existing mission and vision statements are given in the Port of The Dalles 2009 Strategic Business Plan (2009 Plan) as the following.

Mission:

The Port is dedicated to supporting the creation, retention, expansion, and recruitment of businesses and jobs that will enhance the economy of the port district.

Vision:

The Port will be a critical contributor to economic development in the region by continuing its successful public partnerships and private sector facilitation. In addition to industrial land development, the Port will explore new, fiscally responsible, employment-generating strategies that increase the wealth and well-being of the Port District.

Goals:

The 2009 Plan establishes the Port's priorities for economic development over the next five, 10, and 20 years. The 2009 Plan further lists objectives and specific projects to implement the Port's overall mission.

Goal: Industrial Development – The Port will leverage its financial and physical assets to further the mission statement and continue industrial sector growth.

Objective 1: Land Development (in The Dalles and Port District)

- Instigate and/or facilitate development of industrial lands in the District

Objective 2: Land Redevelopment (in The Dalles and Port District)

- Instigate and/or facilitate redevelopment of currently underdeveloped industrial lands in the District

Objective 3: Land Supply (in the region)

- Ensure a buildable industrial land supply of 250-300 acres over the next 20 *years*

Goal: Regional Participation – The Port will engage in regional economic development through strategic partnerships with public and private groups in the District and surrounding areas.

Objective 1: Partnerships

- Engage in strategic partnerships with public entities in the District and region to aid completion of economic development projects

Objective 2: Renewable Energy Industry

- Encourage development of the renewable energy industry (generation projects, supply chain manufacturing, supporting services, etc.) in the District and region

Objective 3: Land Development (in the region)

- Work with regional communities to promote economic development and support job creation on industrial lands

Goal: Facilitation and Recruitment – The Port will continue its successful partnerships with the public and private sectors to facilitate economic development and recruit business to the District and region.

Objective 1: Recruitment

- Work with landowners and prospective businesses to increase industrial economic development and employment in the District and region

Objective 2: Renewable Energy Industry

- Encourage development of the renewable energy industry (generation projects, supply chain manufacturing, supporting services, etc.) in the District and region

Objective 3: Recreation Industry

- Encourage development of recreation industry projects that provide economic development and create jobs in the District and region

Goal: Fiscal Strength – The Port will ensure its fiscal accountability and long-term strength by exploring new revenue sources and investing responsibly in projects.

Objective 1: Land Development

- Instigate and/or facilitate development or redevelopment of industrial lands in The Dalles, the Port District, and communities throughout the region

Objective 2: Recreation Industry

- Encourage development of recreation industry projects that provide economic development and create jobs in the District and region

III. STRATEGIC PLAN DEVELOPMENT PROCESS

This plan is provided to meet the requirements of Business Oregon and was developed with significant community outreach, including 22 stakeholder interviews, public meetings, Commission workshops, and a focus group session. The Port's assets, infrastructure, project and financing needs and implementation strategies were analyzed to help guide the Port's future actions. The public and Port Commission will review and comment on the draft plan in May 2013 and feedback will be incorporated. The consultant team will present a final proposed Strategic Business Plan for Commission adoption (see Appendix B, Public Outreach Summary).

IV. PORT OVERVIEW AND DESCRIPTION

A. Sites and Facilities

The Port owns 17 properties in the City of The Dalles and the surrounding area, including a marina, the site of the Port’s administrative offices, three undeveloped commercial sites with views of the Columbia River, and the North Chenoweth Business Park site, which is being planned for development (see Appendix C, Facilities Condition Assessment).

Marina

The marina is located on the Columbia River in The Dalles on an approximate 15-acre site (see Figure 1 below). The marina can accommodate 62 boathouses and has 25 boat slips and an open moorage area with 12 transient pull-in slips. A launch dock and ramp are located at the east end of the marina. To the east, the marina borders Riverfront Park, a recreational park operated by the Northern Wasco County Park & Recreation District. There are two perimeter breakwaters in the Columbia River that are owned by the US Army Corps of Engineers: a timber pile breakwater along the western perimeter and a rock breakwater along the northern and eastern perimeters. Two rock jetties located on the eastern and western sides of the ramp protect the boat launch.



Figure 1 – Port of The Dalles Marina

Port Offices

The Port's offices are located on a 4.23-acre site at 3636 Klindt Drive in The Dalles (see Figure 2). The administrative offices are located in a converted two-story dwelling with a finished basement. South of the administrative offices is a three-bay wood-framed carport. The Port's maintenance shop is located north of the administrative offices and is a two-story wood-framed structure. A stone retaining wall starts at the south end of the carport structure and ends at the maintenance shop. An asphalt parking lot provides surface parking at the Port facilities.



Figure 2 - Port of The Dalles Office Facilities

North Chenoweth Business Park

The North Chenoweth Business Park is an 80-acre unimproved parcel with 50 net buildable acres being prepared for development (see Figure 3). The site is adjacent to the Riverfront Trail and Bonneville Power Administration's Chenoweth substation. The Port is currently developing engineering plans for roads and utilities to serve the North Chenoweth Business Park site.



Figure 3 - North Chenoweth Business Park Concept Plan

B. Accomplishments

In recent years, the Port and the City have implemented many of the following public facility investments inside the Port District.²

- 1985: City passes \$4.5 million bond to improve Port property
- 1998: City annexes Port property
- 1999: Port sets aside 16+ acres for the Riverfront Trail at an estimated value of \$1,250,000 (\$75,000/acre)
- 1999: Port completes the Chenoweth Creek Industrial Subdivision – 58 acres, \$1,500,000 project
- 2001: Port transfers Riverfront Park to Parks and Recreation
- 2002: Port constructs Klindt Cove parking area to access Riverfront Trail and public beach

² "Current and Past Projects." *Economic Development*. Port of The Dalles, n.d. Web 8 Jan. 2013.

- 2003: Port invests \$700,000 in infrastructure improvements to add an additional 21 industrial lots to current land inventory
- 2004: Port receives “Certified Industrial Site” certification from the state of Oregon for industrial properties.
- 2005: Port bonds paid off
- 2005: Google purchases 30 acres, Flagstone Development purchases 6.7 acres, Tum-A-Lum purchases 3 acres, Riverfront Assets purchases 2.4 acres
- 2006: Port partners with Wasco County on a new bridge over Chenoweth Creek
- 2009: Port purchases building on Madison Street for Wonderworks new home
- 2012: North Chenoweth Industrial Site receives Business Oregon’s “Decision Ready” Status

C. Industrial and Commercial Properties

The Port is a critical contributor to economic development in the Mid-Columbia region. Most of the Port’s economic activity is within the City, primarily in the Port of The Dalles Industrial Park.

The industrial and commercial properties owned by the Port are generally located north and east of Interstate 84 (I-84) along the Columbia River. The Port continues to invest in infrastructure needed to attract new business and industry. It is anticipated that the Port will break ground on the new 80-acre North Chenoweth Business Park in August 2013. This and other recent infrastructure investments by the City, Port, and Oregon Department of Transportation are expected to leverage additional private industrial and commercial development in the area. Highlights of these investments include:

- New tour boat terminal near downtown
- New riverfront festival area
- Wonderworks (children’s museum) celebrated its grand opening in October 2012. The Port was a major partner in this community amenity. Wonderworks entered into an agreement for the final purchase of the building from the Port once necessary funds have been raised/leveraged for additional capital improvements.
- The Port is working to develop market-ready industrial land on the North Chenoweth Industrial Site (formerly Mountain Fir Lumber). This Port-owned site nets 50-acres and is currently in the conceptual design phase. It will include approximately 10-12 sites of 1.5 to 2 acres each, and an additional 30-acre parcel for larger developments. The site has Business Oregon’s Decision Ready Certification status, which provides advance marketing to prospective site users.
- The Port is working on a programmatic solution to new development because wetlands in this region are frequently hydrologically connected to waters that are habitat for threatened and endangered species, entailing a need to satisfy state and federal regulatory requirements.
- The Port is currently exploring options for a role in the revitalization of downtown The Dalles. Efforts are underway to target potential projects that meet the Port’s mission of economic development.

D. Zoning

The Port of The Dalles Strategic Business Plan focuses on development opportunities within its District, which includes the cities of The Dalles and Dufur.

The City of The Dalles and Dufur

Zoning for the cities of The Dalles and Dufur (see Appendix A, Maps) show properties within the Port District that are zoned Industrial and Recreational Commercial District. It is recommended that 1-2 acres of the North Chenoweth Business Park be rezoned from Industrial to Commercial/Light Industrial to allow flexibility for limited scale business park employee-serving commercial retail use, such as a restaurant/pub. These zones support a number of economic and employment opportunities as permitted or conditional uses. Tables 1 and 2 summarize permitted or conditional uses in The Dalles Industrial (I), Recreational Commercial District (CR), and Commercial/Light Industrial (CLI) zones. A description of allowed used in the City of Dufur Industrial (M-1) zone follow these tables.

Table 1 – Port of The Dalles Industrial Area Zones – Permitted Uses

Permitted Uses	CLI	I	CR
Agricultural Sales and Service, including feed and seed stores, nurseries, greenhouses, landscape supplies, and garden centers	✓		
Animal Sales and Services (pet stores, grooming, kennels, veterinary)	✓		
Automobile and heavy/light equipment repair, sales and services	✓		
Child Care Center	✓	✓	
Contractor shops, offices, and storage areas	✓		
Engineering, research and development	✓	✓	
Food Services	✓		
Hotels and Motels	✓		✓
Laundromats and Dry Cleaners	✓	✓	
Light manufacture, assembly, and packaging	✓		
Liquor stores, taverns, lounges and bars	✓		
Manufactured Home Sales	✓		
Markets and Grocery Stores	✓		
Medical and Dental Offices, Clinics, and Laboratories	✓		
Personal Care Services	✓		
Printing and Publishing	✓	✓	
Professional and Administrative Offices and Services	✓		
Public Parks and Open Space	✓	✓	✓
Public and Private Parking Lots	✓	✓	✓
Public and private transportation depots and terminals, passengers and freight	✓		
Public and private transportation depots and terminals, passengers and freight	✓		

Permitted Uses	CLI	I	CR
Recreation Facilities (commercial - indoor), including health and athletic clubs, bowling alleys, skating rinks, shooting ranges, movie theaters including multiplexes, and game rooms	✓		✓
Residential dwelling for security and maintenance personnel	✓		✓
Retail Uses, including shopping centers	✓		
Wireless Communication Facilities	✓	✓	✓
Warehousing, storage, and distribution of equipment, commodities and products in an enclosed area, including ministorage facilities	✓	✓	
Wholesale Uses		✓	
Auto body shops, auto painting, and machine shops		✓	
Circus or like activity		✓	
Feed, seed and fuel stores		✓	
Food production and manufacturing		✓	
Food Services		✓	
Heavy Equipment Sales and Service		✓	
Manufacturing, fabricating, processing, repair, engineering, research and development, assembly, wholesale, transfer, distribution, and storage uses		✓	
Public and Private vehicle servicing and fueling stations		✓	
Railroad yards and spurs, shipyards, and commercial docking facilities		✓	
Rock, sand, and gravel cleaning, crushing, processing, and assaying		✓	
Rodeo Grounds		✓	
Storage and maintenance yards		✓	
Transportation Facilities		✓	
Truck stop facility		✓	
Veterinary services, kennels, and fish hatcheries		✓	
Warehouses		✓	
Retail uses under 15,000 feet, excluding shopping centers			✓
Conference, Visitors, and Convention Centers			✓
Light Industrial (campus setting or compatible with commercial and recreational uses)			✓
Dwellings with ground floor commercial use			✓
Restaurants			✓
Recreational Vehicle Parks			✓
Accessory uses, buildings, and structures			✓

Table 2 – Port of The Dalles Industrial Area Zones – Conditional Uses

Conditional Uses	CLI	I	CR
Community Facilities Sites	✓		✓
Planned Development	✓		✓
Recreational Vehicle Parks	✓		
Wireless Communication Facilities	✓	✓	✓
Adult Business	✓		✓
Agriculture and Aqua-culture	✓	✓	
Bulk fuel stores		✓	
Child Care Center		✓	✓
Collection, packaging, storage and reprocessing of recyclable materials		✓	
Junkyards and automotive wrecking yards		✓	
Recreation Facilities		✓	

Dufur Zoning Description

The City of Dufur Ordinance No. 327 defines Industrial as the making of commodities by manufacturing, assembling, fabrication, or compounding by manual labor or machinery. Permitted uses on sites zoned Industrial (M-1) in the City of Dufur include mini-storage facilities and Industrial within an enclosed structure (Light Industrial). Conditional uses on sites zoned M-1 in the City of Dufur include agricultural support services and Industrial outside an enclosed structure (Heavy Industrial).

E. Commission

The Port Commission is governed by ORS 777 and its five members include a president and officers. Port Commissioners do not receive a stipend, but are encouraged to attend training and educational opportunities, which are included in the Port’s budget process. These may include local Oregon Special Districts Association conferences, state and regional training, and lobbying efforts in Washington, DC.

F. Staff

Port staff members are also encouraged to attend training and educational opportunities that add value to their ability to serve the Port Commission and help achieve the Port’s mission. For both Commission and staff training, a report on the conference, seminar, or workshop is presented to share key materials, and is generally made available for all other Commissioners and staff to review.

G. Market Conditions

The following section provides an overview of market conditions (see Appendix D, FCS GROUP Market Analysis).

The US and Oregon economies are still recovering from an 18-month economic recession that began in December 2007 and officially ended in June 2008, according to the National Bureau of Economic Research. As of 2012, moderate economic expansion is occurring nationally and in Oregon. According to the US Bureau of Economic Analysis, real Gross

Domestic Product (GDP) is the measure of the value of all goods and services produced annually) increased by 3.1% during the 3rd quarter of 2012, up from an annual rate of 1.7% in 2011 and 3.0% in 2010. The future GDP outlook is promising. According to recent projections by the Federal Reserve Open Market Committee, national GDP is expected to grow by between 2.5% and 3.0% in 2013, and by 3.0% to 3.8% in 2014.

Oregon’s economic growth is tempered by relatively high unemployment rates and home foreclosures that continue to rise. Oregon posted a year-over-year overall job gain of 19,500 jobs between December 2011 and December 2012, which was an improvement over the prior year’s job gain of 17,800 jobs. At the same time, the state’s seasonally adjusted unemployment rate continued to fall from 9.0% in December 2011 to 8.4% in December 2012 (still higher than the 7.8% unemployment rate for the US). Overall unemployment rates in Wasco County have been lower than the state average with 7.7% unemployment in December 2012, which was more favorable than 8.2% recorded one year prior.

Fortunately, it appears that the Oregon and Washington are now undergoing a modest economic recovery. In Oregon, state economists are predicting a continued upturn in the short term, with employment growing slowly at about 1.2 percent in 2012, plus slightly higher growth in 2013. The Oregon economy should experience more rapid growth than the nation as a whole, but this is not expected to generate a corresponding rise in per capita personal income before 2017, since any income gains will be largely offset by increases in the state population.

H. Local and Regional Partners

Ongoing collaboration with strategic partners allows the Port to leverage efforts to address its mission and manage its assets. Table 3 summarizes the Port’s role in working with each organization.

Table 3 - Port of The Dalles Organizational Partners

Port Partners	Role and Key Issues
Columbia River Gorge Commission	Support the City in its pursuit of a National Scenic Area Boundary amendment
Oregon Land Conservation and Development Commission	Support the City in its efforts to coordinate with the DLCDD to ensure Urban Growth Boundary Expansion compliance
Mid-Columbia Economic Development District (MCEDD)	Partners on key economic development initiatives to grow businesses
Regional Solutions Team	Governor’s team of state agencies assigned to assist with local to state problem solving
Community Outreach Team	Local leaders in business, education and industry invited to assist with Strategic Business Plan development
Columbia Gorge Regional Airport	Owners of industrial land in The Dalles – the Port has supported economic development through water system improvements across the river in Dallesport, Washington

Port Partners	Role and Key Issues
Columbia Gorge Community College Small Business Development Center	Financial analysis, business planning, market research and business coaching
Local Businesses and Tenants	Provide opportunities for business expansion on and off of port holdings
City of The Dalles	Coordinate for economic development, Particularly downtown
Wasco County	Coordinate regarding roadway improvements that extend into County jurisdiction
Oregon Department of Transportation	Review and analyze proposed development against traffic trip assignments in the Chenoweth Interchange Area Management Plan

V. **DEFINING THE PROBLEM AND OPPORTUNITY**

This section includes a brief summary of current demographic and industry trends, community input, and job growth opportunities (see Appendix D FCS GROUP Market Analysis).

A. **District Demographic Profile**

As indicated in

Table 4, Wasco County had a population of 25,300 people in 2011. Wasco County's average annual population growth rate over the 2000 to 2010 timeframe was 0.58%, which is well below the Oregon growth rate (1.14%). The City of The Dalles is the largest and fastest growing jurisdiction in Wasco County, with population growth equal to or exceeding the state average.

Table 4 - Population Trends

	2000 Census	2010 Census	2011 PSU	AAGR	
				2000-2010	2010-2011
Wasco County	23,791	25,213	25,300	0.58%	0.35%
The Dalles	12,156	13,620	14,440	1.14%	6.02%
Antelope	59	46	45	-2.46%	-2.17%
Dufur	588	604	605	0.27%	0.17%
Maupin	411	418	420	0.17%	0.48%
Mosier	410	433	435	0.55%	0.46%
Shaniko	26	36	35	3.31%	-2.78%
Portland MSA ¹	1,927,881	2,226,009	2,246,083	1.45%	0.90%
Oregon	3,421,399	3,831,074	3,857,625	1.14%	0.69%

Source: April 1, 2010 US Census; PSU College of Urban and Public Affairs Annual Population Estimates

(1) Portland Metropolitan Statistical Area consists of Clackamas, Clark, Columbia, Multnomah, Skamania, Washington, and Yamhill counties.

Income levels within Wasco County have been increasing over the past decade in spite of two national economic recessions. As indicated in Table 5, the median household income level for Wasco County was approximately \$41,314 in 2010 and the average per capita income level was \$21,407. While Wasco County’s per capita income levels have increased faster than the Oregon and national averages over the 2000–2010 timeframe, local income levels are about 14% lower than the Oregon statewide average. In summary, there has been a recent trend towards a slowly increasing younger low-income population in Wasco County.

Table 5 - Income Trends

		1999	2010	AAGR
Median Household Income	Wasco County	\$35,959	\$41,314	1.3%
	Hood River County	\$38,326	\$51,414	2.7%
	Oregon	\$40,916	\$46,560	1.2%
	Washington	\$45,776	\$55,631	1.8%
	USA	\$41,994	\$50,046	1.6%
Per Capita Income	Wasco County	\$17,195	\$21,407	2.0%
	Hood River County	\$17,877	\$23,061	2.3%
	Oregon	\$20,940	\$24,753	1.5%
	Washington	\$22,973	\$28,364	1.9%
	USA	\$21,587	\$26,059	1.7%

Source: Census (in 1999 dollars) and ACS for 2008–2010 (in 2010 dollars)

B. District Economic Profile

The economy within the Port District is directly linked with the Columbia River Gorge economy, which is partially influenced by economic activity across the United States and global marketplaces. The area of the Port District includes the northern one-third of Wasco County. While some economic activity also occurs directly across the Columbia River with residents and businesses in Klickitat County (including Dallesport and Lyle, Washington), the vast majority of economic interaction between the Port and the larger region is contained within Wasco County.

Over the past three decades, the Port spearheaded the development of The Dalles Industrial Area and the Port’s marina. The Port has opted to sell most of the Industrial Area to private businesses, but still has an active lease on an industrial-zoned parcel with Mid-Columbia Producers. An economic analysis of the 53 businesses that now occupy the Port’s Industrial Area indicates that these businesses currently employ approximately 1,028 workers with a direct annual payroll of \$48.3 million (average payroll of \$47,000).

In addition to periodic construction-related benefits from Port and private business construction spending, the ongoing business operations for the aforementioned businesses provide the following annual local and regional economic benefits:

- Tenants and businesses on Port-developed lands have direct employment of over 1,028 jobs within Wasco County.
- Direct annual GDP of approximately \$83 million. This includes employee compensation (\$45 million), property/lease income (\$22 million), state and local tax payments (\$7 million), and proprietor profits (\$9 million).

The indirect and induced secondary economic benefits that are generated by the Port and its tenants and the businesses that have purchased Port properties over the past few years account for additional annual economic benefits through the purchase of goods and services in the local/regional economy. These secondary benefits include:

- Support for 337 induced jobs (full and part-time positions) in supply/vendor chains.
- Another 333 indirect jobs from the re-spending of direct labor income.
- An additional \$36 million in annual GDP from indirect and induced spending.
- Total annual economic output of \$264 million for the region.

In summary, the Port's prior development of the Port Industrial Area and related land sales and leases have helped attract and retain 53 businesses, which have become major economic drivers within the local and regional economy. These businesses currently support 1,028 direct jobs and 670 indirect/induced jobs, and contribute \$264 million in annual economic output.

C. Trends for Regional, State, and National Key Industries

The greater Portland region is one of four primary international trade gateways along the West Coast. Rapidly growing Asian and Middle Eastern economies will result in significant increases in demand for trade into and out of most international and regional ports, including the Port. Commodity flow forecasts for the region project a doubling of freight volume over the next 20 years. This growth equates to an average annual growth rate of 2-3%.

As global and state GDP rises and commodity trade increases, Oregon ports could benefit from increases in import and export activity. The value of Oregon exports reached a record high of \$18.3 billion in 2011 (according to the most recent data by the US Department of Commerce), up 3.6% from 2010. Oregon's leading trade partner is China, which now imports about 23% of Oregon exports. Other leading export destinations in decreasing order include Malaysia, Canada, Japan, South Korea, and Taiwan.

According to the Oregon Employment Department, at the end of 2011, Wasco County had 1,120 employers (at separate locations). In 2011, the total employment in Wasco County included 9,540 jobs covered by unemployment insurance. The current level of employment is down from the recent 2008 peak of 10,870 jobs, but as indicated in Figure 4, there have been recent increases recorded within the services and retail sectors with little or no growth in government and industrial sectors since 2008.

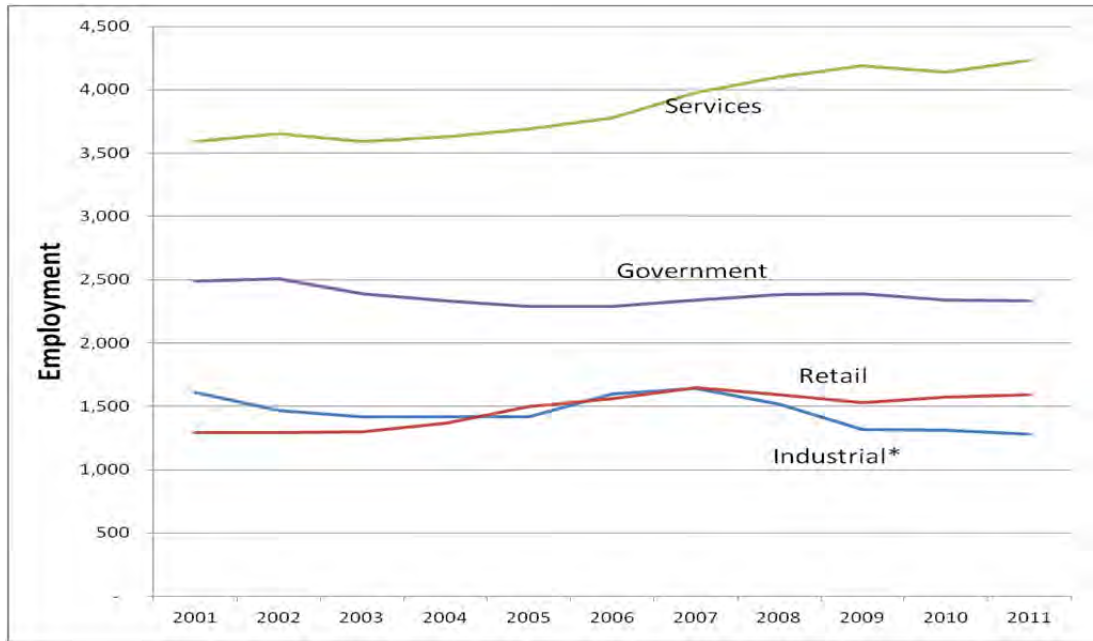


Figure 4 - Wasco County Employment Trends, 2001-2011

While many Wasco County employment sectors are down from their 2008 peak, post-recession job growth has occurred between 2008 and 2011 in construction, professional and business services, education and health services, other services, and state government.

Wasco County has a relatively high share of seasonal part-time and home-based employment that is not reflected in the “covered” employment estimates reported by the Oregon Employment Department. It is estimated that approximately 26% of total employment in Wasco County is not reported by OED (equates to +/- 3,000 jobs). As indicated in Table 6, the total 2012 employment in Wasco County is estimated to include: 3,458 industrial jobs, 2,063 retail trade jobs, 5,699 service jobs, and 2,365 government jobs.

Table 6 - Estimated Employment in Wasco County, 2012

Sector	2012 Covered Jobs (Actual) ¹	Ratio of Total to Covered Jobs ²	2012 Total Jobs (Estimate)
Industrial	2,882	1.20	3,458
Retail trade	1,587	1.30	2,063
Services	4,071	1.40	5,699
Total private employment	8,540	1.31	11,221
Government employment	2,252	1.05	2,365
Total non-farm employment	10,792	1.26	13,586

¹ Industrial reflects: manufacturing, construction, wholesale trade, transportation, utilities and information. Services include business, health, education and leisure/hospitality and other services.

² Ratios are derived from 2010 IMPLAN analysis (total job count estimates) in comparison to Oregon Employment Department covered worker data.

Agriculture plays a major role in the regional economy. The six counties surrounding the Port District include 2,248 farms with nearly 3.7 million acres. The annual commodity value of farm products in the region increased significantly between 2002 and 2007—from about \$180 million to approximately \$316 million. In 2007, the top commodity products in these six counties included: fruits and nuts (\$156 million); grains, dried beans, oilseeds (\$76 million); cattle (\$42 million); and hay/other crops (\$28 million). Monthly agricultural employment within these six counties reaches a seasonal peak of 11,940 workers in July and has an annual average employment level of 5,550 workers.

The Port's Direct Impact on Jobs

The Oregon Employment Department anticipates a 1.2% annual average growth rate for the Region 9 (Hood River, Gilliam, Sherman, Wasco, and Wheeler counties) job base over the 2010 to 2020 period.

The Port is likely to benefit from “spillover” growth from the Portland region. The Portland region is forecast to add between 326,000 and 769,000 jobs over the next 20 years. Metro (the regional government) is assuming that 73% of the job growth realized by 2030 will be captured within the tri-county Metro Urban Growth Boundary (UGB).³ This leaves at least 27% of the job growth to be accommodated elsewhere, including Wasco County. If Metro’s long-term growth forecasts hold true, Wasco County could have an opportunity to capture a share of the jobs that the Metro UGB cannot accommodate.

District Needs

As the Portland MSA increases in business activity, the vacant “development ready” industrial-zoned land supply in the tri-county Metro region is diminishing. According to studies by Metro, the lack of “development ready” large vacant industrial sites within the Metro region with adequate truck/rail/barge access is expected to create a gap in the land needed in the Metro UGB to support preferences for large lot formats for single and multi-tenant users.

Community Role

As part of the strategic plan, meaningful input was gathered through 22 stakeholder interviews, public meetings, Port Commission workshops, and a focus group session. Community input is reflected in the plan, which has been presented at two Port Commission meetings for review and refinement. The plan will be refined and presented for adoption by the Port Commission in May 2013. The Port has taken considerable steps to ensure that the views of local community leaders, businesses, and residents are heard and reflected within this Strategic Business Plan.

³ Metro, Regional Growth Report, 2009. Tri-County area consists of Multnomah, Washington and Clackamas counties.

Community input shows supports for:

- Development of the North Chenoweth Business Park for near-term employment land needs
- Urban Growth Boundary and Scenic Area expansion for long-term employment land needs
- Downtown, community-wide and regional economic development support, and
- Amenities to attract the “new economy,” including high-tech and advanced manufacturing jobs

For detailed input, see Appendix B, Public Outreach Summary.

VI. POLICY CONTEXT

The Port of The Dalles is committed to operation under federal, state, and local policies. An overview of key policies and compliance items is indicated below.

A. Planning and Environmental Policy Compliance Issues

The state’s policy structure has a significant impact in shaping the future of the Port of The Dalles. This plan underscores areas of alignment with the state’s policy structure.

Columbia River Gorge National Scenic Area

The Columbia River Gorge National Scenic Area Act was passed in 1986 for two purposes:

1. *To establish a national scenic area to protect and provide for the enhancement of the scenic, cultural, recreational, and natural resources of the Columbia River Gorge;*
2. *To protect and support the economy of the Columbia River Gorge area by encouraging growth to occur in existing urban areas and by allowing future economic development in a manner that is consistent with paragraph 1.*

The Scenic Area includes approximately 83 miles and covers portions of six counties and 13 cities, including Wasco County, the City of The Dalles, and the Port of The Dalles. The Scenic Area is divided into three categories of land: Urban Areas, the Special Management Area (SMA), and the General Management Area (GMA). Urban Areas are exempt from the Management Plan, but are eligible to receive federal funds authorized implement it. Significant commercial, residential, and industrial development is encouraged in Urban Areas. The City of The Dalles is designated an Urban Area within the National Scenic Area (see Appendix A, Maps).

The City has been working to amend its Urban Area for the past seven years to accommodate growth. Urban Areas will be the primary focus for future growth and economic development, and an expansion of the Urban Growth Boundary would require an amendment to the National Scenic Area Act. Ongoing efforts to amend the

Scenic Area Boundary are a top priority for the City, with the Port in vested support role in order to meet its job creation mission.

Statewide Planning Goals

Oregon's land use planning is based on 19 Statewide Planning Goals and applies to State agencies, local governments, and special districts. The goals expressed in the state's policies must be addressed to effectively influence the Port's land use and economic development strategies. The Port's plan is most influenced by Oregon's statewide planning goals 9 and 12.

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 requires local jurisdictions to maintain a 20-year supply of employment lands suitable to meet the needs of local business and industry likely to locate during this period. For the Port, this Strategic Business Plan establishes a need for 172 acres of additional employment land to meet forecast growth over the next 10 years. A portion of this need can be met within underutilized buildings and on available land located within the Port District. The City and the Port will require twice this amount of employment land, or 344 acres, to accommodate 20-year commercial and industrial growth within the Urban Growth Boundary. Given a modest amount of infill development (10%-20%), this finding is consistent with the Port's current policy of providing 250 to 300 acres of employment land over the next 20 years (see Appendix D, FCS GROUP Market Analysis).

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 City of The Dalles Transportation System Plan (2006) identifies a number of improvements, some of which would impact development prospects for the Port. Traffic volumes in The Dalles are expected to increase in the future due to population growth and employment in area. Through an evaluation of the 2015 traffic demand, improvement options were identified to improve safety conditions at existing locations and to provide access to developing areas in the city.

Local and Regional Plans

I-84 Chenoweth Interchange Area Management Plan

The interchange area management plan identifies land use management strategies, near-term, midterm, long-term, and long-term vision transportation improvements, an access

management plan, and strategies to fund identified improvements. These planning efforts resulted in policies, ordinances, and other provisions that will be adopted into the City and Wasco transportation system plans, comprehensive plans, and development review ordinances to support and implement the interchange area management plan.

An interchange area management plan was prepared for the I-84 Chenoweth interchange in the City of The Dalles.

The I-84 Chenoweth interchange (Exit 82) is an urban interchange located near the City's northwestern boundary that connects I-84 with Highway 30 on the west side of the interchange and River Road on the east side. The land uses served by the Chenoweth interchange are primarily industrial, although some commercial land (known as the WM3 site) is located on the east side of the interchange and a mix of commercial and residential is located on its west side. Most of the land in the land use study area east of I-84 is zoned Industrial District. Forecasted traffic trips include development of the planned North Chenoweth Business Park. Because less commercial land is available to develop in the WM3 "CLI"-zoned area due to the existence of wetlands, some additional land use intensity could be accommodated "on balance" within the interchange area management plan study area, including the North Chenoweth Business Park.

Mid-Columbia Economic Development District Comprehensive Economic Development Strategy

MCEDD collaborates with the community annually to develop the comprehensive economic development strategy. The vision in the 2012 strategy states that "[t]he Mid-Columbia region envisions a thriving and prosperous economy supporting diverse entrepreneurial opportunities that act in harmony with the area's rural qualities, values and natural resources." The coordinated regional effort is intended to meet the current needs of the region and plan for the future. The strategy identifies regional challenges and establishes regional goals, objectives, and implementation strategies to enhance its economy. The following economic development goals have been identified in the 2012 strategy:

Business Retention/Expansion: Enhance the retention and expansion of businesses in the Mid-Columbia/Columbia River Gorge.

Business Attraction: Achieve an increase in new business to the region that will continue to diversify the economy and create sustainable opportunities, including family wage jobs, over the next 10 years.

Infrastructure: Facilitate the timely maintenance and improvement of public infrastructure and support scalable infrastructure development, which will contribute to increased economic opportunities.

Economic Resources: Increase the Mid-Columbia region's receipt of resources for economic development initiatives, including funding, technical assistance and training.

Entrepreneurial Environment: Facilitate integrative partnerships and communication across business clusters, industries, entrepreneurs, government and economic development organizations to further develop an effective economic support structure.

Workforce: Regularly assess needed workforce requirements, ensuring a regional workforce that is work-ready and well-educated.

Bi-State Engagement: Engage elected representatives in Oregon and Washington to advocate more effectively for the common needs of the Columbia River Gorge in support of all the other six goals.

The Port continues to work directly with MCEDD and other local economic development agencies to implement the Comprehensive Economic Development Strategy goals.

VII. SITUATIONAL ANALYSIS

A. Identify Strengths, Weaknesses, Opportunities, and Threats

The project team gathered local input to assess the Port's strengths, weaknesses, opportunities, and threats (SWOT). The outreach and review component included interviews with 22 stakeholders, a presentation at a public meeting on February 13, 2013, and the port facilities report and market study (see Appendix B, Public Outreach Summary). The Port's present SWOT analysis includes:

Table 7 - Port of The Dalles SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Located along three main transportation corridors (the Columbia River, rail, and I-84) with access to the Columbia Gorge Regional Airport • High quality of life • Unique environmental and historical setting • Low electric power prices • Reputation for getting things done • Transportation hub and regional market center • Access to/from the Portland market and to PDX airport • Low commercial lease rates • Concentration of technical/scientific workers • Low cost of land, labor, utilities, and cost of living 	<ul style="list-style-type: none"> • No shovel-ready industrial land available • Perceived distance from Portland hinders businesses and tourism to invest • Must operate mainly on revenue from property taxes • Minimal investment interest from the \$5 million cash on hand • Lack of revenue streams constrains opportunities to expand development activities • Marina utilities are over-burdened with unintended uses • Limited funding available for marina upgrades • Some marina boathouses used as residences • Remote location with small population and labor force • Gaps in retail downtown
Opportunities	Threats
<ul style="list-style-type: none"> • Mixed use development • Redevelopment of Elks building • Partnerships for downtown development • Gap funding for business expansion • River frontage development opportunity sites • Job training and incentive programs • Seek to leverage existing tech businesses to attract related support businesses • High quality family restaurants • Location on the Columbia River • Shipping (historic use/underutilized) • Economic development collaboration • Downtown redevelopment and infill • Access to Portland, Seattle, and San Francisco Bay area markets • Value-added agricultural users 	<ul style="list-style-type: none"> • Lack of Industrial Land to accommodate growth • Downtown projects could distract from focus on shovel ready industrial land • National Scenic Area regulations and constraints • Environmental policies and wetlands • Development costs • Urban growth boundary expansion difficulties • NW Aluminum site clean-up costs • Minimal land available for economic development • Marina management should not distract the Port from higher priority activities

B. Critical Issues

The Port of The Dalles opportunities rely heavily upon developing its available employment land supply, improved amenities to attract new industry, and to a lesser extent maintenance and improvements for the marina over time. There is a limited supply of medium to large vacant development sites within the Port District. Additional industrial development sites would be required to optimize potential job growth and private investment. Development of the North Chenoweth Industrial Site will ease near-term land need pressure (50 acres), but an additional 200 to 250 acres of employment land is needed over the next 20 years. Topography, Scenic Area, and UGB boundary constraints place limitations on developable land, so increased infill and diligence are required to meet the job growth objective shared by the Port and City.

The Dalles is transitioning from a resource economy to one that now includes “new economy” activities, such as avionics, hi-tech composites, electronic components, robotics, clean tech/wind energy, and health sciences (see Appendix B, Public Outreach Summary). The Port can better attract and retain new technology businesses and young creative professionals by capitalizing on its location, high quality of life, and historic character. New industrial and business park developments should include amenities such as walking/bike paths, pocket parks, water access points, and entertainment establishments will help attract and retain new technology businesses.

C. Demand Analysis

The projected demand for private employment land within the Port District is expected to require approximately 172 acres of land area over 10 years and 344 acres over 20 years. The analysis assumes that the Port plays an active role in Wasco County to accommodate the majority of the job growth that is expected to occur in Oregon Employment Department Region 9.⁴ The amount of new job growth within the Port District hinges upon the ability to provide amenities and services that retain and attract businesses, delivery of vacant “market ready” industrial sites and buildings, and the level of redevelopment that occurs in Downtown and surrounding areas.

This analysis assumes 10-year projected job growth of 2,776 non-farm private jobs within the Port District, which equates to about 60% of the jobs the Oregon Employment Department expects to be added to Region 9. The amount of buildable industrial land required to accommodate the industrial land need over the next 10 years is just over 100 acres. In addition to the industrial land need, it is projected that about +/- 17 acres of would be needed for retail and 51 acres of land (530,000 SF of building floor area) would be needed for service/office uses over the next 10 years.

Note: These land and employment growth forecasts assume that adequate development sites are provided along with adequate public facilities (roads, water, sewer, etc.) to meet market requirements. To the extent that adequate industrial and commercial/office sites

⁴ Region 9 consists of Gilliam, Hood River, Sherman, Wasco and Wheeler counties.

are not provided to meet market demand, future employment growth and non-agricultural business activity within the Port District will taper off.

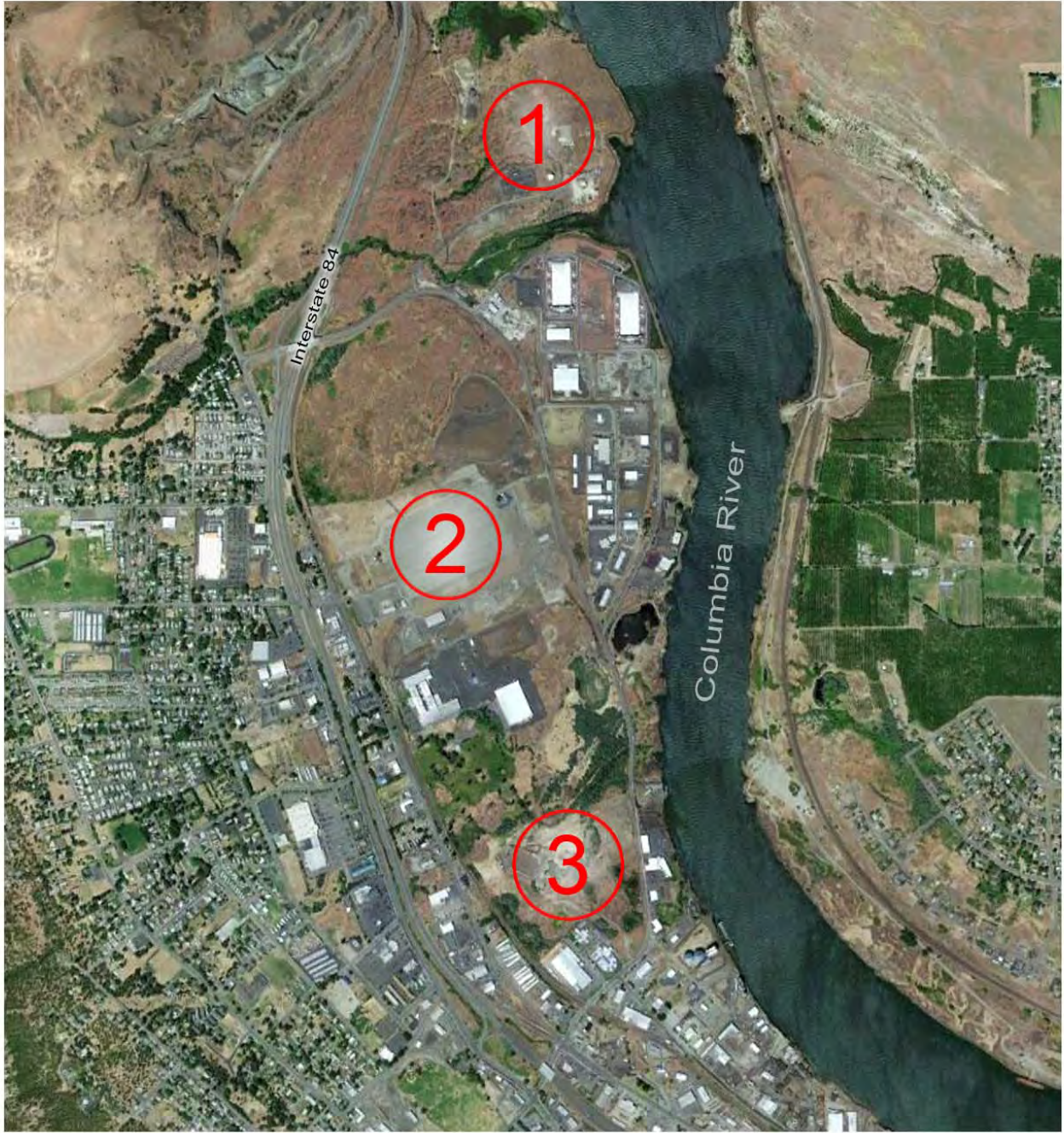
In addition to the 10-year employment land need, additional residential and employment land needs have been identified by the City to address long-term land use planning requirements. Over the very long term (next 40 years), the City has identified the need to expand the UGB by about 138 acres to meet employment land needs.⁵

D. Port Industrial Opportunity Sites

This plan has been developed with an understanding of Port assets, infrastructure, project, and financing needs. Data and inventory were collected through research on existing data and site visits, a site and public facilities review, and a market and economic analysis. Opportunity sites, projects, and implementation strategies have been identified to help guide the Port's future actions.

Industrial development opportunity sites include the North Chenoweth Business Park, the Northwest Aluminum Site, and the Rodeo Grounds. **Figure 5** shows the location of these Port Industrial opportunity sites.

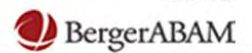
⁵ This is based upon findings contained in The Dalles Urban Reserve Area Report, by Winterbrook Planning (2007), and The Dalles Economic Opportunities Analysis, by ECONorthwest (2007).



- 1. North Chenoweth Site
- 2. N.W. Aluminum Site
- 3. Rodeo Grounds

The Port of The Dalles

The Dalles, Oregon | Industrial Opportunity Sites



2013-03-29



Figure 5 - Port of The Dalles Industrial Opportunity Sites

The 80-acre North Chenoweth site is owned by the Port, with a groundbreaking planned during 2013 in order to provide 50-net acres of ready industrial land. **Figure 6** shows how the North Chenoweth Business Park may develop, including a high level of amenities, such as river walks, park and streetscape elements including trees and benches – a local employee service restaurant or brew pub may also help to attract new economy employees.

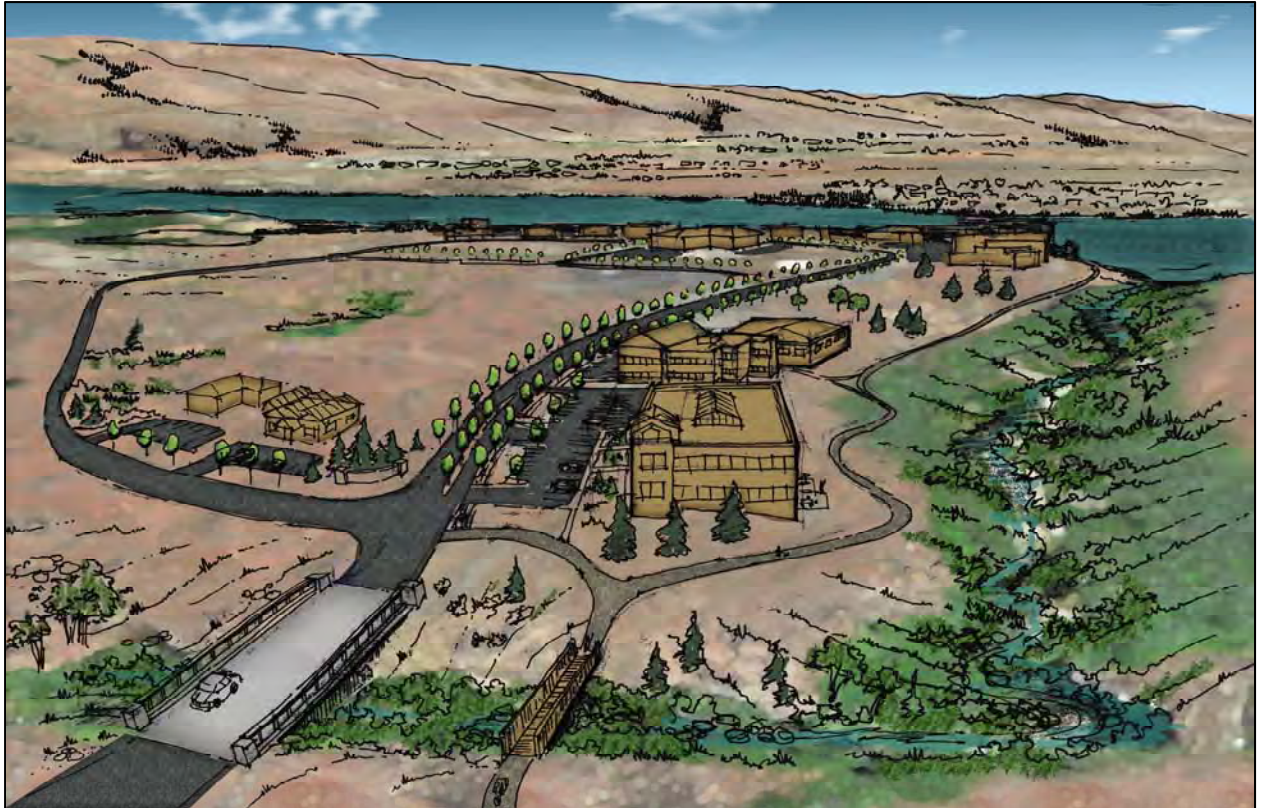


Figure 6 - North Chenoweth Business Park Development Concept

Other industrial properties with potential for long term redevelopment include the Rodeo Grounds, a portion of which was used as an unofficial city dump, and the former N.W. Aluminum smelter site. Both sites have received conditional “No Further Action” determinations from the Oregon Department of Environmental Quality, allowing them to be redeveloped for industrial uses. Other employment opportunities within the Port District boundaries include infill development within the downtown area of The Dalles and a potential rural agricultural-serving industrial site located within the City of Dufur. An Economic Development Framework Plan could be developed to detail implementation strategies for land diligence projects and marketing strategies to help attract businesses to The Dalles.

E. Risk Analysis

Table 8 identifies the top strategic projects being pursued by the Port and the risks associated with developing each project.

Table 8 - Project and Policy Risks

Action	Risk	Notes
UGB Expansion	Inadequate land supply.	Requires NSA amendment; Port support to City lead.
NSA Amendment	A major amendment to the Columbia River Gorge National Scenic Area Boundary has never been completed - inability to complete a boundary adjustment will limit available land for job growth.	Port and City need to collaborate to pursue an amendment, even if legislation is required.
Economic Development Framework Plan	There are concerns that the many economic development agencies operating in The Dalles do not have a shared vision or action plan	Port should be a visible economic development leader and help develop a framework plan in support of MCEDD, the Chamber of Commerce and other agencies.
Marina Maintenance	Deferred maintenance will potentially cost more over time. Uses should be considered for limitations in intensity to guard against expensive upgrades.	The marina is zoned for boat houses, and is not designed for house boat use (increased number of appliance and fixtures). The Port should limit uses to those presently allowed to avoid expensive upgrades.

VIII. STRATEGIC BUSINESS PLAN

The following section addresses the plan elements required by the Statewide Ports Strategic Business Plan, including five sub-plan elements:

- A. Management
- B. Financial
- C. Capital Facilities
- D. Environmental
- E. Marketing

For each plan element, a set of goals, policies, and strategies for action is recommended to advance the plan toward fulfilling the Port's mission.

A. Management Plan

Goal 1: Integrate the Strategic Business Plan as a planning tool to help the Port Commission and staff manage the Port's physical and human resources.

Policy: The Port will utilize its Strategic Business Plan to meet the Port's mission.

Strategy 1: Ensure ongoing training and educational opportunities are provided and budgeted for Port Commissioners and staff to best meet the Port's mission.

Strategy 2: Review the Strategic Business Plan annually and update the Port's work plan and budget to ensure targeted project priorities are included.

Strategy 3: Maintain strategic plan budgets and schedules and amend annually as needed to meet changing conditions.

Goal 2: Strengthen and develop relationships with government agencies, organizations, businesses, and the general public.

Policy: Ensure the Port of The Dalles is an active, visible leader in the pursuit of local and regional economic development.

Strategy 1: Continue to support the City in its efforts to develop needed employment lands through work with state and federal agencies to expand The Dalles' Urban Growth Boundary (UGB) and National Scenic Area Boundary (NSA).

Strategy 2: Coordinate efforts with the MCEDD comprehensive economic development strategy to enhance regional economic development.

Strategy 3: Develop an economic development framework plan that involves and coordinates local and regional economic development agencies toward a shared vision and assigned tasks to address land needs, development strategies/amenities, infill opportunities, and marketing target industries.

Strategy 4: Assist The Dalles Irrigation District with system expansion needs to support agricultural production (e.g. work with the Regional Solutions Team to seek funding for acquisition of Columbia River Water Rights).

B. Financial Plan

Goal 1: Ensure the Port's ongoing financial viability in order to fulfill its mission.

Policy: The Port will continue to use accepted accounting practices and will strive to maintain operating reserves.

Strategy 1: The Port will update its indirect cost allocation plan biannually. This fund would justify appropriate transfers from the Port Development Fund and Marina Fund to the General Fund.

Strategy 2: The Port will maintain operating reserves in each fund to cover 90 days of expenditures in addition to any reserve required by debt covenants.

Strategy 3: Investments in land and improvements will be made to provide adequate and enhanced employment opportunities to attract target business growth.

Strategy 4. Funds will be budgeted to adequately address short-term (5-year), mid-term (6–10-year) and long-term (11–20-year) employment land needs, including due diligence, infrastructure and amenities (see Appendix E, Financial Plan).

C. Capital Facilities Plan

Goal 1: Develop and maintain a capital facilities plan that provides cost estimates for needed capital and maintenance investments in order to meet the Port's mission.

Policy: The Port will develop a capital plan with planning-level cost estimates for priority projects, including operations and maintenance.

Strategy 1: The Port's Strategic Business Plan includes an initial capital plan to be adopted and updated annually.

Strategy 2: Interim opportunities, including new users and grant opportunities, may be addressed through immediate updates to the capital facilities plan with this Strategic Business Plan.

Table 9 - Capital Facilities Plan

Sites	Projects	Preliminary Cost Estimate (2013 dollars)	Year			Notes
			1-5	6-10	11-20	
North Chenoweth Business Park (Option A)	Permitting Costs	\$267,000	\$267,000			Costs for N. Chenoweth Business Park are estimated from HHPR preliminary engineer's estimate based on concept plans (January 2013) and increased for design and contingencies.
	Grading	\$2,141,000	\$2,141,000			
	Water System Improvements	\$304,000	\$304,000			
	Sanitary Sewer Improvements	\$330,000	\$330,000			
	Storm Improvements	\$389,000	\$389,000			
	Wearing Surfaces	\$848,000	\$848,000			
	Utility Improvement	\$102,000	\$102,000			
	Landscaping	\$85,000	\$ 85,000			
	Amenities/ Streetscape	\$450,000	\$450,000			Est. 10% of above cost for amenities including streetscape landscaping, furniture/benches, river trails, etc.
	Subtotal	\$4,916,000	\$4,916,000			
Marina	Boat Launch Repairs	\$10,000	\$10,000			Est. repair cost for floats, dock bumpers, pile hoops, AC pavement. Does not include cost for scour hole repair at end of ramp.
	Marina Electrical Upgrades	\$300,000		\$300,000		TBD
	Marina Upgrades	\$1,600,000			\$1,600,000	Estimated future replacement of floats depending on condition
	Operations & Maintenance	700,000	\$175,000	\$175,000	\$350,000	Estimated \$35,000/year for materials and services based on FY 2012-2013 budget
	Subtotal	\$2,610,000	\$185,000	\$475,000	\$1,950,000	
Brownfield Redevelopment	Brownfield Studies	\$500,000		\$250,000	\$250,000	TBD for environmental permitting and mitigation studies
	Subtotal	\$500,000		\$250,000	\$250,000	
	TOTAL	\$8,026,000	\$5,101,000	\$725,000	\$2,200,000	

D. Environmental Plan

Goal: The Port of The Dalles will achieve its mission while maintaining responsible environmental stewardship. Environmental considerations will be integrated into the Port's strategic planning and business decision-making.

Policy: The Port will work to maintain statutory environmental compliance for all operations on its property.

Strategy 1: Work with local representatives to address issues and engage community input as needed for special projects.

Strategy 3: Identify environmental project opportunities and common goals in collaboration with other local, state, and federal agencies in order to leverage project resources, as appropriate.

Strategy 4: Work with regulatory partners to identify appropriate mitigation sites.

E. Marketing Plan

Goal 1: Inventory and market the Port District's assets and opportunities in coordination with local, regional and state partners.

Policy: Lead the coordination and development of an economic development framework plan that considers a shared vision for community and regional economic development, including agreed roles, tasks, and timelines for implementation efforts.

Strategy 1: Inventory available land and underutilized buildings in order to target opportunities for new development, redevelopment, and infill. This strategy can both extend the vital land need horizon and strengthen the existing community (i.e., downtown) by filling empty storefronts while developing new employment lands.

Strategy 2: Increase visibility in the Portland, Seattle, and San Francisco markets.

Strategy 2: Promote the City's character and lifestyle to appeal to the "creative class" and to the Japanese and broader Asian markets.

Strategy 3: Work with economic and agency partners such as MCEDD and the Gorge Commission to market the area's developable land base as a scarce commodity in a high quality location.

IX. IMPLEMENTATION PLAN

A. Action Plan

Implementing the Port of The Dalles Strategic Business Plan will require ongoing efforts by the Port and other agencies to achieve the plan's planned capital, marketing, and maintenance project priorities, as outlined in *Volume 1. Strategy*.

B. Plan Update

The Port of The Dalles Strategic Business Plan is presented for review and adoption by the Port Commission, with review and acceptance by Business Oregon. Once adopted, the Port may request Oregon Ports Planning and Marketing funds for projects within the Strategic Business Plan. The plan may be amended to accommodate changing conditions and new opportunities, and must be updated every 10 years, with a year 5 mid-point review. Projects and capital costs are recommended for annual review.