



"At Oregon Coast Community College we equip students for success by providing educational pathways and supports in response to the diverse needs of our community. Through accessible and engaging programs, we enrich the economic and civic vitality of Lincoln County and beyond."

External Environmental Scan – Lincoln County

*January 2019
Oregon Coast Community College
Office of Instruction
Newport, Oregon*

OCCC External Environmental Scan – Lincoln County

Table of Contents

Executive Summary	1
Purpose of This Report	1
Scope of Report	1
Report Findings.....	2
Age Distribution	2
Education	2
Racial/Ethnic Diversity.....	2
Income.....	2
Industry Employment.....	3
Occupational Employment	3
Local and State Level Strategic Planning.....	3
Implications for Economic Development.....	3
Implications for OCCC	4
Geography	5
Topography	5
Early History	5
Recent History.....	6
Population Centers.....	7
Lincoln County Population	9
Population Level, Growth Rate, and Gender Distribution	9
Distribution of County Population.....	9
Population by Self-reported Race and Hispanic or Latino Identification	10
Age Distribution of Population.....	10
County Level and Composition of Personal Income	11
Components of Personal Income by Percentage	11
Education	12
Lincoln County School District	12
Lincoln County High Schools.....	13
Statewide and Lincoln County School District Student Demographics.....	13
Oregon Coast Community College (OCCC)	14
Lincoln County Highest Educational Attainment Levels	15
County-wide Attainment Levels	15

Educational Attainment - 18 to 24 Years of Age	15
Educational Attainment - 25 Years and Older.....	16
Educational Attainment Levels Disaggregated	16
Lincoln County Wage and Income Distribution	17
Per Capita Income and Median Earnings	17
Median Earnings Disaggregated by Racial/Ethnic Self-Identification	18
Median Earnings by Education Level and Gender	19
Education and Poverty.....	19
Lincoln County Poverty Levels	20
Poverty Incidence	20
Poverty Hot Spot - Nye Beach area.....	21
Supplemental Nutrition Assistance Program (SNAP) Recipients	21
Poverty, Minimum Wage, and Living Wage Levels	22
Federal Poverty Hourly and Monthly Wage Level.....	22
Area Minimum Wage Level.....	22
MIT Living Wage Calculator.....	23
Living Wage Calculator – Lincoln County	23
Relevance of Living Wage to OCCC Curriculum and Regional Economic Development.....	24
Industry Sector and Occupational Employment	25
Equity in Employment and Wages by Gender	26
Employment by Occupation	26
Employment Projections	28
Local Economic Development and Strategic Planning Initiatives	28
Opportunities to Support Regional Economic Development	32
Maritime Sector.....	33
Technology	35
Gender Disparities	35
Improving Educational Attainment Levels.....	36
Challenges and Opportunities.....	36
Works Referenced or Cited	i

OCCC External Environmental Scan – Lincoln County

Executive Summary

Purpose of This Report

This report was prepared for Oregon Coast Community College (OCCC) as it enters its 32nd year of operation and completes the final steps of being accredited as an independent community college by the Northwest Commission on Colleges and Universities (NWCCU).

OCCC has benefitted from the sponsorship of other larger community colleges during its decades of operation; however, under accepted standards of sponsorship, OCCC has been constrained to offering mainly those educational programs, degrees, and certificates that the sponsoring college is authorized to provide. Independent accreditation will bring with it an enhanced ability for OCCC to develop and implement regionally specific educational programs and offerings that are tailored to support the businesses, industries, and residents of its unique service area.

While status as an independent college can bring more freedom in some areas, it also brings new demands on institutional capacity, with the assumption of and accountability for new functions, processes, and procedures that had previously been adopted from or provided by the sponsoring college. The initial years of independence, especially for a small, rural college, tend to be characterized by a period of insufficient resources to meet the need for increased capacity. Supplemental funding from outside sources often provides the means to effect institutional improvements while enrollment grows and some economies of scale can be reached by the college.

This external scan was compiled in recognition of the import of college strategic decision-making over the next period. It is intended to inform the college's strategic planning process and through that, the design and continuous improvement of educational programming, student support services, and outreach activities. In combination with internal data, including the assessment of course and program learning outcomes, it is also a resource for program review at the instructional program and service area levels.

Scope of Report

Since the intent of this report is to inform the strategic planning process for an educational institution, its scope tends to be limited to characteristics of the county's population and community that are directly related to the provision of educational services and programming. Therefore it focuses on characteristics including gender and ethnicity, income and educational levels, primary employment sectors of the economy, and occupational trends. Where possible data are disaggregated through an equity lens to identify disproportionate representation or disadvantage. Improved understanding of these factors among the college's community and student base informs the provision, delivery, and accessibility of educational programs and services.

In most cases data are reported at the county and the state levels, to provide a broad reference point. For comparison with counties with similar characteristics, data are provided for Clatsop, Linn, Tillamook, and Lane counties, with Benton county data provided on occasion to serve as a reference for a neighboring, less rural, county. A five-year period of data is used for most tables, corresponding to the years 2013-2017 (2018 data is not yet available).

County-wide data was drawn almost exclusively from the US Census Bureau's American Community Survey (ACS), 2017. The use of a single, credible, and common data source across factors brings consistency across reported data variables. The other primary data source was the Oregon Department of Education (ODE). ACS and ODE data are, in most cases, available to the public online for further exploration.

Report Findings

Data and information provided in this report can be summarized in broad terms as follows:

Age Distribution

A growing percentage of the county population is aged 65 years or older, resulting in a diminishing working-age population. The workforce median age is 51 years, meaning that half of the full-time workforce is more than 51 years of age.

Education

While Lincoln County's high school completion rate is competitive with state performance levels, it lags behind in terms of bachelor's degree completion and the completion rate of higher degrees or professional certifications. While a significant percentage has completed some college work, the conversion rate to an associate's degree or higher is low.

Racial/Ethnic Diversity

Lincoln County is predominately White, with the largest represented minority populations identifying as Hispanic/Latino (8.9%) or American Indian/Alaskan Native (2.8%). Minority populations in the county tend to have a higher proportion of their group represented among the economically disadvantaged, and also tend to have lower levels of educational attainment. When disaggregated by gender, females among minority groups tend to have higher representation at lower levels of poverty than males.

Income

Median wage levels across the county are comparatively low when compared to state levels and other counties. Analysis of poverty, minimum wage, and the "Living Wage" levels indicate that a significant percentage of residents in the county earn only a subsistence wage, while many others cluster at or near the federal poverty

level. Wage levels typically rise with educational attainment; however, there is a marked disparity in wage levels between males and females. Generally, racial and ethnic minorities have higher representation rates at or below the poverty level. This is heightened among those members of each group who have lower educational attainment levels.

Industry Employment

The county is heavily reliant on tourism, with 28% of full-time, year-round jobs located in the Accommodations and Food Services, and Retail Trade sectors. These two sectors, however, are among the lowest paid sectors in the county, with median wages ranging between \$22,000 and \$28,000 annually. These sectors, along with the Health Care and Social Assistance, Education, Manufacturing, and Construction sectors, account for 55% of all employment in the county, and 58% of full-time, year-round employment.

Occupational Employment

More than half of the working age population in the county work in Sales, Service, or Office and Administrative Support occupational categories. This is reflective of the high percentage of employment in the Accommodations and Food Service, and Retail Trade industry sectors. The high percentage of the population aged 65 years or older is a contributing factor as well, as this population tends to be consumers of healthcare support, personal care, and maintenance support services.

Local and State Level Strategic Planning

The college has been an active participant at the table in local, regional, and state-level strategic planning meetings concerning workforce and economic development. Within the county, local strategic plans cite the goal to develop “living wage” occupational opportunities to support future economic growth and diversification. The regional workforce development group works collaboratively and cooperatively with state-level efforts in identifying potential sectors for development and support, with an eye to maximizing the scarce resources of rural counties and colleges.

Recently, regional and state level workforce development groups have given recognition to the importance of the Maritime sector in Oregon’s economy and particularly in some counties. Lincoln County has been identified as a potential site for support of the Maritime Construction sub-sector, which can encompass a broad variety of technical skills and expertise. Locally, there are ongoing strategic plans for expansion of Maritime- and Marine-related resources, including the Ports of Newport and Toledo, and the Toledo Shipyard.

Implications for Economic Development

In Lincoln County, multiple existing structural factors contribute to downward pressure on wages and a reliance on part-time workers. While high demand in Service and Sales

occupations and a reliance on part-time workers can be a limiting factor in terms of economic and revenue growth, this also provides an employment base for younger and seasonal workers. Barring an unlikely, transformational, change, these factors will continue to be present in Lincoln County.

Efforts to diversify the occupational, industry, and economic base will be most successful long-term and have highest risk minimization if they capitalize on the existing and evolving resources and infrastructure within the county. With education, the skills and knowledge base to support the new employment openings can be developed within the existing labor force, with the long-term goal of attracting new workers to the region.

Improvement of the educational attainment levels within disadvantaged groups of the population will increase their earning potential and standard of living, and by extension have positive effects on the economy.

Implications for OCCC

During its first years of independence OCCC will continue to build on the strong foundation of student support services and educational offerings it has already established, while it assumes full oversight of all college functions and operations. As a critical partner in economic and workforce development initiatives, development of new educational offerings should bolster local goals to support new “living wage” employment opportunities in the region.

The Maritime Construction sub-sector is emerging as a potential expansion area for the county, introducing a need for new training programs and educational offerings. Multi-level support and existing infrastructure may help to reduce costs of program development and implementation for the college, especially if offerings are developed in an evolutionary path. Based on the industry composition of the county and the strengths OCCC has already developed in this area, the area of technology is also cited as an area for possible expansion, with these offerings supporting many currently offered programs. Cybersecurity, data analysis and compilation, online media and marketing, and the technical systems and applications utilized in these areas represent cross-functional skills that are in growing demand across all industries.

The college provides high school completion classes and advising and support services for individuals to help them improve their educational attainment levels. Improved outreach and increased community awareness of these opportunities may help to encourage residents to complete a high school credential or add to college coursework they have already completed, with a direct impact on their earning potential and the local economy.

OCCC External Environmental Scan – Lincoln County

January 2019

Geography

Lincoln County is part of the Central Oregon Coast region, and is bordered by Tillamook County on the north, Polk and Benton Counties on the east, Lane County on the south, and the Pacific Ocean on the west. It extends some 60 miles north and south, and is just 15-25 miles in width, bordered by the Coast Range of mountains on the east. The Ocean and the Coast Range form natural barriers on the west and east sides of the county, with a limited number of two-lane roads over the Coast Range to access the more urban and diverse Willamette Valley region.

The county is 992 square miles in size, for a total of 634,880 acres. In 2017 its population was estimated to be 48,920 and as such it is classified as a rural county, with a population density of 49 people per square mile (based on 2017 Estimate, US Bureau of the Census).

Topography

Blessed with an abundance of natural resources, Lincoln County has five major rivers, sourced in the Coast Range, which flow into the Pacific Ocean, each of which form a small bay at its mouth: the Alsea, Salmon, Siletz, Yachats, and Yaquina rivers. These rivers, bays, and the many small streams and lakes that lie along their route attract visitors year-round and offer sustenance and employment to the residents of Lincoln County through their abundant yield of river and marine life.

While the region possesses abundant marine and estuary resources, the topography of its land mass is varied and less suitable for pasture or agricultural use than some of its surrounding counties. Only 15-25 miles in width between the Pacific Ocean and the Coast mountain range, the land area is characterized by narrow, winding coastal valleys and bordered on its west in most cases by rugged coastal cliffs and headlands, resulting in only small and scattered areas of flat bottom land. The land's elevation varies widely from only a few feet above sea level to 1,500 feet in elevation. The land, however, is richly forested and has provided resources for log harvesting, processing and shipping for most of the county's history.

Early History

Prior to the arrival of European explorers, the coastal lands of the Pacific Northwest were inhabited by numerous established indigenous peoples with rich traditions, cultures, and history. Initial contact among the two populations was somewhat limited as

white incursion into Native American territory came primarily from fur trappers, traders, and explorers. The exception were the Columbia, Umpqua, and Willamette River Valleys, where trading forts, missionary outposts, farms, and grist and lumber mills began to be established. In the 1840s, as miners and settlers appropriated more and more land historically used by Native American tribes, placing greater demand on land and resources, tensions mounted and deteriorated into open warfare between the two populations.

The passage of the Oregon Land Donation Act by Congress in 1850 exacerbated tensions and promoted the disenfranchisement of the native populations. Under the provisions of this act, which promised land titles to immigrants, more than 2.5 million acres of Native American land in Oregon were ceded to settlers. In cases where Indians were living on highly desirable lands, it was not uncommon for them to be forcibly evicted or even killed.

Seven treaties, which ceded 15 million acres of tribal land to the US government, were eventually negotiated with the Oregon tribes east of the Coast Range. They enabled the tribes to temporarily stay on a small portion of their original land and gave the US President the authority to designate a permanent reservation in the future.

The original intent was to relocate the Coastal Indian tribes to the east with the other Oregon tribes. The tribes were resistant as this meant removing them completely from the environment and lifestyle they had known. The resolution reached in 1855 brought the confederation of all the tribes in Oregon, together with the Coast tribes, on what was to be the Coast reservation.

In 1865 an Executive Order opened Yaquina Bay to settlement, and ten years later the US appropriated nearly 700,000 acres, reducing the original requested reservation area of 1.1 million acres to 225,000 acres. Present reservation lands consist of 4,010 acres.

Today the Confederated Tribes of Siletz are a meaningful identity within Lincoln County and an influential presence. They own and operate the Chinook Winds Casino and Resort in Lincoln City, one of the largest employers and taxpayers in the County. The tribe provides health services to its members and the surrounding public through the Siletz Public Health Center. They also operate the Siletz Valley Early College Academy, a charter school and member of the Lincoln County School District.

Recent History

Lincoln County was created by the Oregon Legislative Assembly in 1893 from the western portion of Benton County and Polk County. Its original county seat was the town of Toledo, located slightly east of the city of Newport. In 1954 the county seat was moved from Toledo to Newport.

In the early 1900s Lincoln County was filled with small communities. Ventures multiplied to serve the continuing stream of visitors who came to the area to enjoy its natural beauty or to seek their own fortunes as entrepreneurs. The Kern Brothers Cannery sprang up in the community of Kernville (near today's Lincoln City) and was the first major industry in that area. Abundant salmon and other fish attracted so many fisherman that the area's fish numbers began to decline. When drift net fishing became prohibited, the logging industry became the dominant industry in the county.

Plentiful timber attracted investors to the region, as the introduction of the railroad spurred growth and made the transportation of sawmill products from logging operations and finished goods convenient. At the peak of logging operations, there were nearly 70 small sawmills throughout the county.

World War I brought a heightened demand for spruce wood to build light airplanes for combat and the logging industry in the county boomed. The federal government constructed a large sawmill in Toledo to support production. However the war ended before the mill was put into operation. Purchased by the Pacific Spruce Corporation, along with the railroads and equipment, the mill is today owned by Georgia-Pacific Corporation and remains in operation.

While logging remains a viable occupation in the county, tourism has become the dominant industry due to the area's natural beauty, abundant forest and marine and estuary resources, and the dramatic conjunction of early growth rainforests meeting the headlands of the ocean coastline.

Population Centers

Lincoln County's population is distributed almost evenly between the unincorporated areas of the county and its incorporated towns of Newport, Lincoln City, Toledo, Depoe Bay, Siletz, Yachats, and Waldport.

Newport

Newport is the county seat and the largest city in the county, with an estimated 10,592 permanent residents in 2017. Known as the Dungeness Crab capital of the world, Newport is also the home of the Oregon Coast Aquarium. Its historic bay front, two lighthouses, and the Yaquina Bay Bridge draw visitors year-round, with charter boats providing whale-watching tours and deep-sea fishing trips. The city boasts more than 80 restaurants and 1,500 hotel rooms. Oregon Coast Community College's main campus is located in Newport, in the South Beach area clustered around the bay and port facilities.

The port of Newport is one of only three deep draft ports on the Oregon coast and is home to the West Coast's largest and most productive, year-round commercial fishing fleets. With a commercial and a recreational marina, the port can accommodate cargo shipping needs and serve the distant water commercial fishing fleet with its international

terminal facilities. The port currently leases one acre to the Oregon Coast Aquarium and 55 acres to Oregon State University's Hatfield Marine Science Center. Since 2011, the port is also the base for the NOAA-MOC's (National Oceanic and Atmospheric Administration Marine Operations Center's) Pacific fleet. With these resources situated in such close proximity, the port of Newport provides a hub for educational and learning experiences in marine and environmental studies, which are complemented by the resources of the port of Toledo fourteen miles upriver.

Lincoln City

Situated in the northern part of the county along scenic highway 101, Lincoln City was formerly composed of a number of small communities which have now been incorporated into the town's boundaries, making it the county's second largest city with nearly 9,000 residents. The oceanfront town, with its collection of unique shops and restaurants, hotels, and resorts, draws tourists year-round, with the town's population swelling to more than 30,000 during summer months.

Lincoln City hosts the Chinook Winds Casino Resort, a beachfront casino resort owned and operated by the Confederated Tribes of Siletz Indians of Oregon, with a hotel and 24 hour casino. The resort is a major employer for the area.

Depoe Bay

Depoe Bay is known as the Whale Watching Capital of the World. With approximately 1,500 residents, the town hosts the world's smallest natural navigable harbor, which supports moorage for both recreational and commercial boats and is home to a Coast Guard station. The town is situated along the headlands of the Oregon coastline and visitors can view the grey whale migration while strolling around the town's shops and restaurants.

Siletz

Established in 1910 and incorporated in 1946, and with 1,267 residents, Siletz is located inland from Newport and contiguous to the Confederated Tribes of Siletz reservation. The Confederated Tribes are an integral part of this community with the Tribal Health Center providing services to tribe members and the general public. Like the rest of the county, logging and other industries centered on the natural resources of the area were important to the area's development. Today Siletz is known as a "Fisherman's Paradise." Siletz is also home to the Siletz Early College Academy, a charter school which is part of the Lincoln County School District and supported with funds from the Chinook Winds Casino.

Toledo

Toledo is the former county seat and long-time industrial center of the county. In the late 1890s a rail line was established through the county and connected to Toledo. The rail line, combined with the abundance of timber, made logging a viable industry, supporting

war-time efforts in the early 1900s. At its peak the Toledo sawmill employed 800 people. With the end of World War I and the diminished demand for spruce pine, the town's industrial base began to decline. The completion of Highway 20, an east-west route over the Coast Range, bypassed the town, leaving it off the path of commercial and visitor traffic. In 1952 Georgia Pacific bought the saw mill, and it continues in operation as the only remaining saw mill in Lincoln County. An economy in transition, Toledo remains a vibrant community with its historic downtown and beautiful setting.

Toledo is also home to the Port of Toledo, with a marina 14 river miles inland from Newport, along the Yaquina River. The Port of Toledo Shipyard offers a range of repair and maintenance services, including haul out, painting, steel fabrication, and mechanical and systems repair and installation, as well as project management services for more comprehensive needs. The Port has a dockside repair service that services most of the 68 Alaska Fleet vessels every year. Each of these vessels generates approximately \$30,000 in income to the county while in port undergoing work and repairs.

Yachats

Yachats, with a population of 757 in 2017, is known as the Gateway to Cape Perpetua, a national scenic area with 2,700 acres of trails and coastal habitat. The small town is a destination point for tourists hiking through its old growth rainforests and exploring its tidal pools, with access to state parks and recreation areas.

Waldport

In the southern part of the county, Waldport is located on the Alsea River and Alsea Bay, with its pristine beaches and tidal pools. The town once hosted several sawmills and salmon canneries. Today, while some still pursue logging as an occupation, the saw mills are gone. The rail line that once extended to Toledo to support logging operations was abandoned in 1935 when the demand for spruce to build airplanes in wartime declined.

Lincoln County Population

Population Level, Growth Rate, and Gender Distribution

Lincoln County population in 2017 was estimated by the US Census to be 48,920 individuals (Appendix, Table 1). Over the five-year period between 2013 and 2017, the population grew by 2,602 residents, or approximately 5.6 percent. The annual growth rate has been on a slightly increasing trend since 2013, with a growth rate of 2.1% between 2016 and 2017. The population is evenly distributed between males and females, with females having a slight majority at 51.8% in the county.

Distribution of County Population

With a population density of 49 people per square mile (Appendix, Table 2), the county's residents are distributed roughly evenly between the incorporated areas (or defined Urban Growth Boundaries of a city/town) and the unincorporated areas of the county. Its low population density illustrates the primarily rural nature of the county, with most of its incorporated areas clustered on the coastal Highway 101. Toledo and Siletz are the exception, with Toledo being located 14 miles inland from Newport, and Siletz situated roughly in the central portion of the county at the juncture of rural routes 229 and 410.

Lincoln County's population swells dramatically during high tourist season. This is significant because it means the county must maintain utilities, health and emergency, and other services at a level much higher than that necessary to serve its permanent resident population. For example, the Chamber of Commerce in Lincoln City estimates that its city's population increases to over 30,000 during peak summer months, more than three times the number of permanent residents (<https://lcchamber.com/lincoln-city-oregon-demographics/>).

The county-wide growth rate of 5.6 percent has been distributed nearly evenly between unincorporated areas and its cities and towns, with cities growing at nearly an equivalent rate over the five year period. The exception is Yachats, exhibiting a growth rate of 8.45%. However Yachats is a small community of less than 800 residents – its growth rate when measured in percentage terms will be disproportionately large. The actual numerical change provided in the Appendix, Table 2 indicates that Yachats grew by a total of 59 residents over the period.

Population by Self-reported Race and Hispanic or Latino Identification

The permanent resident population of the county exhibits little diversity in racial identification, with more than 80 percent self-identifying as White alone (Appendix, Table 3). Those self-reporting as American Indian or Alaskan Native represent 2.8 percent, while those self-reporting as Two or More Races represent 3.6 percent of the population. A larger percentage, 8.9%, report themselves as being of Hispanic or Latino ethnicity. The representative shares of the population between racial and ethnic identities has remained relatively stable over the last five years.

Age Distribution of Population

Across defined age groups, the largest percentage of the county's population (27.4%) is 65 years of age or older, with an increase of almost four percentage points over the last five years (Appendix, Table 4). This represents the largest increase in percentage of any other population age group. While the representation in the birth to 19 years of age group has remained stable, the representation in every other age group under 65 has slightly declined in the same period. With the largest growth rate in the population occurring in the 65 or older age group, this means that, conversely, the representation

of the working age population is gradually declining, and that some in this age group are actually leaving the county.

The median age of the population has also been increasing slightly over the five year period, currently at 51.6 years of age. (The median is the middle value in the data set, meaning that half of the values lie below it and half above). This reflects the increases in the population aged 65 years or older cited earlier but is also an indication that the working age population itself is aging over this same period.

In aggregate, those of working age (20 – 64 years of age) represent 53.7 percent of the population, down from 57% in 2013 (Appendix, Table 4). A slowly declining working age population, combined with an increase in those 65 or older, has implications over time for the county's economic development prospects, if the trend continues.

County Level and Composition of Personal Income

The growing proportion of those age 65 or older also influences the sources of income for Lincoln County as a whole. County-wide, Transfer Payments, which are composed of Social Security payments, Food Stamp/SNAP assistance, and other social assistance, represent a growing percentage of total personal income in the county (Appendix, Table 5). The proportion that represents wages from earnings, which are generated by the actual production of goods and services, is correspondingly declining.

Components of Personal Income by Percentage

When compared to other counties, the differences between urban and rural counties are evident. Overall in the state of Oregon, Earnings by Place of Work represent 72.1 percent of personal income, and transfer receipts account for approximately 19 percent of income received (Appendix, Table 6). Earnings by Place of Work in Multnomah County, an urban county, account for 77.1 percent of personal income, when adjustment for place of residence are made. Transfer receipts represent 14.2 percent in Multnomah County, which may be a reflection of a younger age distribution in the population.

In rural counties, however (see Appendix, Table 6), such as Tillamook, Linn, and Lincoln Counties, Earnings by Place of Work tend to account for less than 60 percent of personal income, while transfer receipts hover around 28 percent. This is a reflection of the aging population in rural counties (with a corresponding smaller percentage of the population made up of working age individuals). If not reversed, the aging of the population will eventually limit the growth potential in these regions, and will also lead to a continuing decline in Earnings by Place of Work in the components of the region's personal income.

As the median age of the workforce increases, the existing labor force will see a growing number of retirements, and a growing number of replacement job openings, assuming demand stays stable over time. Regions with similar conditions experience a

growing demand for people in the health and service occupations to serve the older age group, coinciding with a diminishing labor supply, as the working age population declines, to satisfy that demand.

A growing, skilled, and educated labor force is an essential component for the economic development potential of any region – and also serves as an incentive for employers to locate their business there. Ideally, the region would be attracting individuals in the working ages 18 through 64, with growth in the younger age groups, yielding a stable or slightly declining median age.

Economic development groups and planning councils in Lincoln County have long recognized this trend. Recent state-wide studies indicate this aging of the population may be common in rural counties in Oregon, and workforce development initiatives are being devoted to supporting a diversification of the rural economies, with a coordinated and strategic perspective.

Education

Lincoln County School District

Lincoln County K-12 education is overseen by a single county-wide school district meeting the diverse needs of its small towns and communities. In 2017-18 the district enrolled 5,520 students and employed 298 teachers and 79 educational assistants. District high school students are served by four public schools and three charter schools: Lincoln City Career Technical High School, Eddyville Charter School, and Siletz Valley Early College Academy. More than 95 percent of the district's students qualify for free or reduced price lunches (Oregon Department of Education, Lincoln County School District Report Card 2017-18). The district's fall membership report indicates that the student body racial/ethnic distribution is 63.2 percent white, 22.3 percent Hispanic/Latino, and 4.6 percent American Indian/Alaskan Native. Eight percent of students identified as Multi-racial.

District-wide four year cohort completion and graduation rates hover between 78 and 79 percent, in line with state figures. The highest graduation rates are among Asian/Pacific Islander and Black/African-American populations and those of Hispanic or Latino origin. Students with disabilities and those claiming Multi-racial or American Indian/Alaskan Native identifications lag behind the aggregate in graduation and completion rates. English learners in high school outperformed those who were not English learners in both completion and graduation rates (figures from Oregon Department of Education District and Schools' Report Card, 2017-18).

The district reported a dropout rate of 4.4 percent in 2017-18, or 69 students. All of these students were members of economically disadvantaged households. Many of these students who may not have been successful in traditional high school may be

able to succeed in a more flexible, self-paced environment such as the one provided by the community college's GED program.

Lincoln County High Schools

Eddyville Charter School is located in the community of Eddyville, with a total enrollment of 195. In addition to the traditional curriculum the school offers a variety of Career Technical classes in subjects such as Culinary Arts/Sewing, Woodshop, Horticulture, and Sports Media.

Siletz Valley Early College Academy, a public charter school in the community of Siletz with an enrollment of 86, offers grades 9-12 and was opened in 2006 with funding from the Chinook Winds Casino. The school places among the top 20 percent of Oregon schools in terms of diversity (with minority enrollment of 65 percent), the percent of students eligible for free lunch, and its student to teacher ratio (15:1). The school is exploring the development of Career Technical offerings.

Lincoln City Career Technical High School is a charter school in Lincoln City with an enrollment of 50. The school offers coursework in Natural Resources Management and Marine Services, integrated with its Coastal Drone Academy. Completers of the academy earn a commercial drone pilot's license. Coursework in other areas, including Audio Engineering and Microcomputers, Woods and Metals, and Culinary and Food Services, is also provided.

In addition to Lincoln City Career Technical High School, Lincoln City is the home of Taft High School, with an enrollment of 467. Taft High School provides Career Technical pathways in Human Resources, Early Childhood Education, Culinary Arts, and Visual, Performing, and Media Arts.

Toledo Senior High School enrolled 205 students in 2017-18. Career Technical pathways include Construction Technology, Auto CAD, Metals Technology, and Woods Technology.

Newport High School lies in the heart of Newport, with an enrollment of 668. Newport High School provides CTE pathways in Human Resources: Childhood Development/Early Childhood Education and Commercial Art.

Waldport High School, in Waldport with an enrollment of 178, provides CTE pathways in Commercial Art, Woods and Metals Manufacturing, Emergency Response, and Coastal Tourism.

Statewide and Lincoln County School District Student Demographics

District-wide student demographics are provided in the Appendix, Table 7. In 2017-18 approximately 63% of Lincoln County School District students identified as White (non-Hispanic), with 22% of students self-reporting as of Hispanic or Latino origin. Students of American Indian/Alaskan Native background represent 4.6 percent of the population. The percentage of students identifying as Hispanic/Latino has increased slightly in the

last five years, with a corresponding decline in the percentage of White (non-Hispanic) students. Compared to state-wide levels, American Indian/Alaskan Native students have significantly greater representation in the district, with Asian and Black/African-American students under-represented.

When comparing demographics across district high schools (Appendix, Table 8), Siletz Valley Early College Academy exhibits greater diversity in its student population, with 40% of its students identifying as American Indian/Alaskan Native, and eighteen percent as Multi-racial. While White representation in Newport and Taft High Schools is slightly below the state-wide level of 63%, with the exception of the Siletz Valley Academy all others exceed the state in percentage of White student population. This is an indication of the diversity levels county-wide. Hispanic or Latino representation is greatest at Newport and Taft High Schools.

Oregon Coast Community College (OCCC)

OCCC is located in the South Beach portion of Newport, a mile from the port of Newport. The community college is pursuing independent accreditation but at the time of this writing is still under the sponsorship of Portland Community College. Terms of this sponsorship limit OCCC's ability to develop new programs and customize offerings to the needs of its own community; however the college has developed strong relationships and partnerships with local education providers and with business and community representatives, and, with independence, will gain the flexibility to develop more of its own flagship programs.

The college serves 2,000 students, and, as the only higher education provider within 50 miles, draws enrollment almost entirely from Lincoln County's population. Its offerings include Associate of Arts and Associate of Science degrees with transfer and articulation opportunities with the state's four-year colleges and universities, as well as Career Technical Programs in Business and Accounting, Early Education, Nursing, Emergency Medical Services, and Aquarium Science. An Associate of Arts degree with a focus on Teacher Education articulates with Western Oregon University's Bachelor's degree in education and teacher certification program.

All county high school students are eligible for a competitive Certified Nursing Assistant program sponsored by Oregon Coast Community College. The community college also offers dual credit opportunities for general education college level courses in a collaborative relationship with the county schools. The recently completed Rural Teacher Education Program is a partnership with OCCC and the Lincoln County School District, and articulates with Western Oregon University's Education program. Its goal is to develop a diverse pool of K-12 teachers in a rural county which is challenged in recruiting and retaining teachers long-term. The first years of this initiative are funded primarily through the Meyer Memorial Trust.

Oregon State University, in the city of Corvallis, is the most accessible four year college to Lincoln County. The university has a strong presence in the community through its

OSU Hatfield Marine Science Center, located at the port of Newport, and has begun construction on a new teaching and research facility at the science center. These new facilities are planned to support OSU's Marine Studies Initiative (MSI), a multi-year, multi-phase project which will include the design of a new, cross-disciplinary bachelor's degree in Marine Science and the expansion of research opportunities in fields including marine habitats, the impact of climate change on the marine environment, and new energy sources. While OCCC's Aquarium Science program is already closely affiliated with the Marine Science Center, significant potential exists for OCCC to expand its offerings in this area and provide articulation, research, and internships opportunities for its students..

Other four year colleges within commuting distance from Lincoln County include the University of Oregon in Eugene, 97 miles away, and Western Oregon University in Monmouth, a 65 mile commute. The community college has articulation agreements with these universities to accept many of the community college courses and award transfer credit, reducing the cost of supporting completion of a four year degree for students and their families.

Lincoln County Highest Educational Attainment Levels

County-wide Attainment Levels

Lincoln County tracks consistently with statewide percentages in completion of high school credentials. Nearly ninety percent of Lincoln County residents have at least a high school degree (Appendix, Table 9). Only 24.1% of the population have a bachelor's degree or higher, lagging behind the state-wide percentage of 32 percent. The gap in bachelor's degree attainment between Lincoln County and state percentages has widened slightly between 2013 and 2017, from five percent to eight percent.

Educational Attainment - 18 to 24 Years of Age

Among those between 18 and 24 years of age, 44.2% list high school as their highest educational attainment level. This indicates that for the youngest portion of the working age population in Lincoln County, nearly half of them have taken no coursework or education since completing high school requirements. This exceeds the state-wide percentage of 30%.

Within this same age group, 35% in the county have completed some college or an Associate's degree. When compared to statewide levels, the county lags behind the state, with 47% of Oregonians between the ages of 18 and 24 having completed some college or an Associate's degree.

Encouraging members of this age group to enroll in college level coursework or add to their coursework to attain an Associate's degree could increase the earning potential of

these residents, at the age when they are most likely to be setting the foundation for their earning lives.

Educational Attainment - 25 Years and Older

Within the population aged 25 years or older, approximately 10 percent have less than a high school credential. The majority of these individuals have completed at least some high school. Consistent with the 18 to 24 age group, a larger percentage than state-wide report that high school is the highest level of education they have completed. 28 percent of this age group have some college but no degree, while only 8.6 percent have completed an Associate's degree.

Oregon Coast Community College, with improved capacity for greater outreach to the community, may be able to assist members of this age group to complete their high school credential, potentially increasing their income and improving their standard of living. Similarly, increasing the conversion rate of college coursework already taken to an Associate's degree could improve the skills of the labor force and thus the economic growth prospects of the county.

Educational Attainment Levels Disaggregated

It is important to keep in mind that since the overall population of Lincoln County reports as overwhelmingly White, the representations in terms of sheer numbers and percentages of other reported races and ethnicities are correspondingly small. However, some differences in attainment levels can be observed when educational attainment is disaggregated by self-reported race and ethnicity (Appendix, Table 8).

Overall, those of Asian identity have a higher educational attainment than any other group, both in terms of high school completions and attainment of Bachelor's degrees or advanced degrees and certifications.

Those claiming Hispanic or Latino origin (2,089 individuals) have only a 65.5% attainment rate of high school completion or some college, compared to 89% of the overall population. They also lag behind the White population in terms of attainment of Bachelor's degrees or some higher level (Appendix, Table 8).

Individuals who claimed "Some Other Race alone" (550 individuals) have the lowest attainment levels of both high school completion (33.3 percent compared to the overall rate of 89.4 percent), and of Bachelor's degrees or higher (9.3 percent compared to the overall rate of 24.1 percent). Of females self-reporting in this category only twenty percent have completed a high school credential or higher level of education.

Those claiming the American Indian or Alaskan Native ethnicity have a lower attainment of high school completion rate (80.7 percent) than the overall population, and the lowest attainment rate of Bachelor's degrees or higher (5.6 percent). This discrepancy is greater when the female American Indian or Alaskan Native population is

disaggregated; females have a high school completion rate of 75.1 percent and attain Bachelor's degrees at a rate of only 2.8 percent.

African Americans in Lincoln County have a high attainment rate of high school completion or higher (95.3 percent), exceeded only by those claiming Asian ethnicity. The completion of a Bachelor's degree or higher level, however, is only at 9.4 percent. The total numbers of individuals claiming Black or African-American ethnicity is small, at only 128 individuals, creating uncertainty in making definitive conclusions. None of the females self-reporting as Black or African-American had completed a Bachelor's degree.

High school completion programs that are designed to be inclusive could result in an increase in high school completion percentages for those of Hispanic or Latino origin and the American Indian/Alaskan Native population. Since females in these groups lag behind males in the attainment of a high school credential or higher, these services could explore and seek to remove potential barriers to their pursuit of education.

Lincoln County Wage and Income Distribution

Per Capita Income and Median Earnings

Per capita income is often used as a proxy for standard of living. It is calculated by dividing total income for the county by the number of residents. Per capita income, however, does not give information about the distribution of income, which can be a more relevant measure when used as a comparative measure between populations. In contrast, the median value in a data set is the value that is exactly in the middle of the set of values. Because of this, fifty percent of the population measured have annual wages below the median level of earnings for the parent population.

Per capita income and median annual earnings in Lincoln County have remained below the state-wide levels over the five year period between 2013 and 2017 (Appendix, Table 11). While Lincoln County income levels have remained relatively stagnant during this time, per capita income state-wide has increased. This illustrates the impact of the earlier recession on median wage levels over the period; wage levels have still not recovered in many rural counties, especially when inflation is taken into account.

Median annual earnings for all workers in the county were \$24,603, meaning that half of the workers in the county made less than this amount. The median annual income level is lower than the per capita income level of \$25,782. This indicates that the per capita income level, as an average, is being influenced by some individual incomes that are much higher. The median level of income has increased by only \$1,121 in five years, and has not kept pace with growth in state-wide levels. The gap between state-wide and Lincoln county levels of per capita income, and of median earnings, has, therefore, widened. This trend tends to be shared by, but is not limited to, rural counties in the state.

The figures presented in Table 11 for median earnings for all workers in Lincoln County are influenced by the inclusion of part-time workers. Since part-time workers generally earn a lower annual wage than full-time workers, the median earnings level for all workers will be lower than median earnings limited to full-time year-round workers. Median earnings for the male portion of this population of workers in the county were \$40,354, 20 percent below state-wide levels (Appendix, Table 11), and actually declined between 2013 and 2017, from \$43,532 to \$40,354.

Female full-time, year-round workers in Lincoln County also lag behind the state in terms of median earnings, at a level of \$32,205 compared to the state-wide median level for females of \$40,556. Their earnings were flat over the five-year period, growing by only \$40 during this time. Even with the decline over time in male median earnings, wages for females still lagged twenty percent behind male earnings in 2017. The differential in male and female earnings is consistent across comparison counties and when measured state-wide (Appendix, Table 12).

The impact of this differential in annual earnings between male and female full-time year-round workers results in a higher representation of females at lower income ranges (Appendix, Table 13). While 37% of the male workers in this category earn more than \$50,000 a year, only 21.6% of females do. A summary of Table 13 is presented below.

	Total Earners at Each Level	Male – percent earners within income range	Female – percent earners within income range
Population 16 Years and Older with Earnings	21,462	10,914	10,548
Full-time, Year-round Workers with Earnings	11,257	6,418	4,839
\$1 To \$24,999	29.7%	24.7%	29.3%
\$25,000 to \$49,999	42.8%	38.0%	49.0%
\$50,000 or more	30.5%	37.2%	21.6%

Source: Condensed from Appendix, Table 13.

Almost 30 percent of full-time year round workers in Lincoln County earn less than \$25,000 a year, with females having a higher representation than males at this income range. Note that of the total working age population in Lincoln County, approximately 52% were employed full-time and year-round, with women having a smaller representation in the full-time workforce than men.

Median Earnings Disaggregated by Racial/Ethnic Self-Identification

While significant disparities exist in median earnings between genders, there are inequities in income across racial and ethnic identities as well (Appendix, Table 14). Because county residents identify as nearly 92 percent White, representation across

other identities is correspondingly small. However, households in the county identifying as Asian and Some Other Race (approximately two percent of households combined) have the highest median earnings. Median earnings for White households were a little more than \$43,000.

Black or African-American households have the lowest median income, at \$17,917. American Indian or Alaskan Native households, and those reporting identity of two or more races, have the next lowest median income levels, at \$34,000 annually. While Black or African-American households represent 0.3% of the county's total, their median annual income is markedly lower than any other group, at 52% of the second lowest income level, and at 41% of the median annual income level for White households (Appendix, Table 14). Annual median income for households claiming Hispanic or Latino ethnicity lags behind White households by more than \$7,000.

Median Earnings by Education Level and Gender

There appears to be a direct association between an individual's highest educational level attained and their median annual income. Median earnings increase steadily as education levels increase (Appendix, Table 15). Among those 25 years of age and older in Lincoln County, high school graduates earned a median income of \$23,223, while those having completed a graduate or professional degree earned a median level of \$42,500.

When the population 25 years and older is disaggregated by gender, disparities between male and female earnings at different educational levels become evident. Regardless of the amount of education attained, median earnings for females lag significantly behind male earnings. Females who are less than high school graduates have median annual earnings of only \$16,071, below the poverty level set at \$16,240 for a household of two. Females who have not completed a high school credential and who are single with children are therefore likely to be raising their children in poverty conditions. For women aged 25 years or older, the largest income gain comes with the attainment of a Bachelor's degree.

Education and Poverty

The connection between levels of educational attainment and poverty levels is confirmed when the county's population is disaggregated according to highest educational attainment level. Overall, the percentage living at or below the poverty level declines as the level of education increases (Appendix, Table 16). When disaggregated by gender, females have a higher poverty incidence at all levels of educational attainment: one third of females with less than high school completion are living at or below the poverty level.

Approximately 10 percent of Lincoln County's working age population lack a high school diploma or its equivalent (Appendix, Table 16). This population has the highest percentage of its population living at or below the poverty rate (29 percent). With the

attainment of a high school credential, the percentage at or below the poverty level drops to approximately 18%. The completion of at least some college brings a further decline, to 13 percent (Appendix, Table 16).

Lincoln County Poverty Levels

In 2017 the federal poverty line was established at \$12,060 annual income for a single person, and \$16,240 for a household of two. Federal guidelines for households with one to four members are presented below.

Household Size	2017 Federal Poverty Income Level
One	\$12,060
Two	16,240
Three	20,420
Four	24,600

Source: Oregon Center for Public Policy

In Lincoln County, fifteen percent of the population 25 years of age or older live at or below the poverty level. This is comparable with state-wide levels.

Poverty Incidence

While Lincoln County tracks closely with state-wide levels of poverty incidence, the data have also shown that per capita income and median earnings in the county lag behind state-wide levels. This indicates that earnings may be clustered at lower levels of income and that, while poverty percentages may track with state levels, there may a large proportion of the population hovering around, but not necessarily below, the poverty level.

The table below presents income levels associated with the 2017 federal income poverty level, the income level that represents half (50%) of that level, and an income level that corresponds to 25% above the poverty level:

Household Size	2017 Federal Poverty Income Level	Half (50%) of Poverty Income Level	125% of Poverty Income Level
One	\$12,060	\$6,030	\$15,075
Two	16,240	8,120	20,300
Three	20,420	10,210	25,525
Four	24,600	12,300	30,750

Source: Derived from 2017 Poverty Guidelines, Oregon Center for Public Policy.

Fifteen percent of the county's overall population earns income at a level equal to or less than the federal poverty guideline, consistent with the state-wide level. However, the percentage of individuals in Lincoln County within 125% of the federal poverty level

(25%) diverges significantly from state-wide levels of 19.7% (Appendix, Table 17). This is consistent with data cited earlier in this report that indicates the county has lower per capita income and median earnings than state-wide reported income levels, and indicates a “clustering” within lower income ranges. When the population is disaggregated according to race and ethnicity, with the exception of the American Indian/Alaskan Native individuals, all other populations have higher representation at 125% of the poverty income level than members of the corresponding state-wide population, further confirming this.

Residents of Black or African-American identity in Lincoln County are disproportionately represented within all ranges reported, with nearly 20 percent living at less than half of the poverty income level (Appendix, Table 17). While the Native Hawaiian and other Pacific Islander population is relatively small in the county, more than half live below the poverty level and nearly two-thirds are below 125% of the poverty level.

Twenty-six percent of the Hispanic/Latino population is living at an income below the poverty level, increasing to 42 percent within 125% of that level. This diverges from the percentages of Whites reported at those levels, at 16.9% and 22.7% respectively.

Poverty Hot Spot - Nye Beach area

In 2015, the Oregon DHS Office of Forecasting, Research, and Analysis released an analysis of high poverty areas in Oregon counties, as part of an effort to better target services and identify needs. The study identified 112 individual or contiguous groups of census tracts across the state which had registered poverty rates of 20 percent or more over two consecutive five year periods. These were designated as “high poverty hotspots.”

The study found one high poverty concentration area in Lincoln County, in the Nye Beach area of Newport. This area is just north of the Yaquina Bay Bridge and is bordered by Highway 101 on the east, with a poverty rate of 23% for a population of 1,996 residents.

At the time of the study, 690 residents in this area were receiving services from the Supplemental Nutritional Assistance Program (SNAP), or about 35% of the area’s population, compared to 24% county-wide, and 20% state-wide (Oregon DHS Office of Forecasting Research, & Analysis). Forty percent of adult SNAP recipients in Nye Beach were employed at the time of the study, with 35% employed in the Accommodations and Food Services industry sector. Average annual earnings for these SNAP recipients actually declined from \$13,314 to \$12,690, or by five percent, over the five-year period.

Supplemental Nutrition Assistance Program (SNAP) Recipients

In 2017 in Lincoln County, 23 percent of households received SNAP assistance. Forty two percent of households receiving SNAP assistance were below the poverty level in terms of income. Among SNAP recipient households, 35% have children under the age

of 18. The median income for these households is \$22,021 a year, with half of households earning some lower income level. A quarter of the families had no employment in the last 12 months. Demographics in this group closely mirror the demographics of the county's general population (American Community Survey, 2017 Estimates, US Census Department).

Poverty, Minimum Wage, and Living Wage Levels

Federal Poverty Hourly and Monthly Wage Level

While the federal poverty level is used by most federal sources to assess community needs and evaluate funding requests, it is a flawed measure if utilized to evaluate an individual or family's ability to meet basic, everyday living expenses. For example, the federal poverty level for an individual in 2017 was \$12,060. For a full-time worker working 40 hours a week, or 2080 hours per year, this translates into an hourly wage of \$5.80, or an average monthly wage of \$1,005 (see below):

	Annual Income	Hourly Wage	Average Monthly Wage
Federal Poverty Level (One Person)	\$12,060	\$5.80	\$1,005
Area Minimum Wage	\$22,360	\$10.75	\$1,863
Minimum Wage Percentage of Federal Poverty Wage	185%	185%	185%

Note: Annual Wage based on 2080 hours worked each year (40 hours per week times 52 weeks). Average Monthly Wage divides Annual Wage by 12 months.

When broken down into an hourly and average monthly wage, the inadequacy of federal poverty level wages to cover basic living expenses is evident to any reader. This is because calculation of federal poverty levels do not account for any costs of living beyond the most basic food needs. Compounding the situation further, the published federal poverty wage level is a gross income figure, rather than the net amount after payroll taxes and other deductions.

Area Minimum Wage Level

The annual and average monthly wage levels associated with the state's accepted minimum hourly wage are provided in the table above, for comparison with federal poverty levels. The divergence between the federal poverty income level and state minimum wage level is significant and dramatic.

The area minimum wage level corresponds to 185% of the federal poverty level for a single wage earner, but still equates to a monthly income figure of \$1,883. This is a barely adequate monthly amount in most locales, especially if there is a dependent being supported, and does not, once again, represent the net amount received by the employee. Minimum wage level calculations also do not typically include all expected

living expenses that most consider basic needs, such as food, childcare, health care, housing, transportation and other typical essential expenses.

Federal poverty guidelines adjust the poverty wage level from \$12,060 to \$16,240 for a household of two, with one income earner who is supporting an additional person in the household. Note that this still lies more than \$6,000 annually below the area minimum wage level based on a single person household. If this wage earner is supporting someone who needs child care or assistance, their wage level must be high enough to enable them to work and pay for care for the other member of the household during working hours. Costs associated with childcare and healthcare, however, are not considered in the adjustment of poverty levels for additional members in a household.

MIT Living Wage Calculator

The shortcomings of minimum wage calculators have been recognized for some time, with continued attempts to improve their reflection of current living realities and complexities. In 2004, Dr. Amy K. Glasmeier at Massachusetts Institute of Technology (MIT) completed and published a comprehensive living wage calculator that addressed many of the common omissions for minimum wage and poverty calculations (livingwage.mit.edu). The MIT Living Wage calculator has gained prominence and recognition among federal, state, and local economists. In addition to being a more inclusive calculation of everyday, basic, living expenses, it also takes into consideration geographic differences in these costs of living, as well as the estimated impact of income and payroll taxes.

While the MIT Living Wage Calculator is more inclusive and, therefore, a more realistic picture of a minimum cost of living than some other tools that have been traditionally used, it nevertheless represents a restricted budget. There is no allowance for what might be considered as “frill” expenditures, but which many consider necessities for some quality of life. No allowances for prepared or restaurant meals, entertainment, leisure time, or holidays are included. Significantly from an economic development perspective, there is no cushion in the living wage calculator for savings, investment or financial planning.

The MIT Living Wage Calculator, then, is calculated by providing only for the most basic needs of a family or individual, in spite of being a more accurate reflection of today's expenses. It should be interpreted as representing a subsistence level of income – but not one that provides for growth in future family needs (education, for example) or investment to improve the family's standard of living.

Living Wage Calculator – Lincoln County

As mentioned, the MIT Living Wage Calculator is calculated on a regional, or county, level, based on geographically prevailing rates for food, child care, health care, housing, transportation, and other expenses such as clothing, personal care products, etc. Based

on this regional calculation, the table below presents the Lincoln County Living Wage levels, compared to the poverty and minimum wage levels, for reference purposes:

	Annual Income	Hourly Wage	Average Monthly Wage
Federal Poverty Level (One Person)	\$12,060	\$5.80	\$1,005
Area Minimum Wage	\$22,360	\$10.75	\$1,863
Minimum Wage Percentage of Federal Poverty Wage	185%	185%	185%
Lincoln County Living Wage Level (MIT Living Wage Calculator)	\$24,627	\$11.84	\$2,052
Living Wage Percentage of Federal Poverty Level	204%	204%	204%
Living Wage Percentage of Minimum Wage Level	110%	110%	110%

Note: Annual Wage based on 2080 hours worked each year (40 hours per week times 52 weeks).
Average Monthly Wage divides Annual Wage by 12 months.

Note that a living wage level for a single individual equates to more than 200 percent of the federal poverty level, while representing a mere subsistence wage that does not provide for future planning or self-improvement. It is clear that the federal poverty guidelines are outdated and do not represent a meaningful point of reference for a minimum standard of living. The figures also reflect that the minimum wage level still lies below that subsistence level of income that provides for a basic level of needs.

The MIT Living Wage Calculator calculates the cost of child care and health care for a single person with one child in the household. When these expenses are factored in, the subsistence wage level for a one adult, one child household increases to an hourly wage of \$24.59 in Lincoln County, or an annual wage level of \$51,147 (payments for income and payroll taxes included in income level requirement) corresponding to a monthly wage level of \$4,262. Based on the previous analysis of wage levels in Lincoln County, a high school graduate aged 25 years or older is earning a median wage level of \$23,223, below the subsistence rate of \$24,627.

With the median level representing the middle value in the data set, this means that more than 50% of people who are 25 years or older in Lincoln County who have completed only a high school credential are living below the subsistence level. If they have a dependent member of the household, they are earning less than half the income required to meet all basic household needs, based on the Living Wage Calculator.

Relevance of Living Wage to OCCC Curriculum and Regional Economic Development

At the core of any community college's regional identity is its ability to meet local educational, industry, and economic development needs through relevant program and course offerings. Community colleges are tied to their community's economic base and its future – as a local provider of higher education, their programs can be customized to support regional and local strategic planning and economic development initiatives.

OCCC's new status as an independent community college will bring with it the ability to more accurately reflect the needs of its community, with offerings that are responsive to community and industry trends. This is key to achievement of College Core Themes of Student Success and Educational Pathways, and to fulfillment of the College Mission.

Meaningful program and course offerings that contribute to the county's economic development will enable a student, with new skills and knowledge base, to earn at least a living wage level. This is an expectation for Career Technical programs, and the development of new occupations that provide living wages for county residents is cited as a goal in several local strategic planning documents. A consideration when exploring the feasibility of new offerings, then, should be the benefit to the student in earning potential as a result of completing the coursework or program, with the prospect of elevating them above a subsistence level of income.

Industry Sector and Occupational Employment

In 2017, 18,891 people in Lincoln County were employed during the year, with 11,111 having full-time, year-round employment. Part-time employment thus makes up 41.2% of total employment in the county (Appendix, Table 18). The highest employment sectors in Lincoln County are the Accommodation and Food Services, Retail Trade, Health Care and Social Assistance, and Manufacturing sectors.

Approximately thirty percent of employment is centered in the Accommodations and Food Services and Retail Trade sectors, which offer among the lowest median wages for full-time year-round workers (\$22,000 to \$28,000 annually). Based on the previous discussion regarding a living wage level, these median wages lie either below or just above the subsistence level of \$24,627, with half of the workers earning an even lower level of income.

Full-time, year-round employment represents between 50 and 57 percent of total employment in the Retail Trade and Accommodation and Food Services sectors, indicating a reliance on part-time workers. This is typical of a sector that is dependent on cyclical flows in tourists and visitors to the area and that tends to train its own workers. It also gives flexibility to the workforce, allowing for seasonal employment for workers in school or with other commitments, and provides employment requiring few entry-level skills.

The Manufacturing sector has the second highest full-time employment ratio, at nearly 74 percent of total positions. This sector also has one of the highest median annual wages, at \$52,279. Other high income sectors are the Educational Services, Professional, Scientific, and Technical Services, and Construction sectors.

All sectors rely on part-time or temporary employees. Manufacturing and Finance and Insurance employment are outliers, with 73 and 81 percent of the positions in these fields representing full-time year-round positions, respectively. Reliance on part-time

positions is highest in the Accommodation and Food Services, Educational Services, and Administrative and Support and Waste Management areas.

Median annual wages in Lincoln County's top employment sectors lag at least 15 percent behind state-wide median annual wages in nearly every instance, with the exception of the Manufacturing sector (Appendix, Table 19). The highest divergence in income levels is in the Professional, Scientific, and Technical Services sector, where state-wide median wages are \$70,378, compared to \$44,330 in Lincoln County. Approximately 880 people are employed in this sector, with 427 full-time positions included in this total.

Compared to other counties often used as reference points, Lincoln County's median wages are the lowest in Retail Trade and Professional, Scientific, and Technical Services. Among those counties referenced, Lincoln and Clatsop counties have the highest median wages in the Health Care and Social Assistance fields (Appendix, Table 19).

Equity in Employment and Wages by Gender

Across all industry sectors in Lincoln County, males have a slightly higher representation in total employment, at 57 percent (Appendix, Table 20). Female wages in the county in aggregate are lower than male wages, equal to a level that is 80% of male wages.

When employment in different industry sectors is disaggregated by gender, there are clear differentials in representation and median wage levels. Males hold the majority of full-time, year-round positions in the Manufacturing and Construction sectors, which are among the highest paid sectors. Females who are employed in these sectors, however, earn wages at a level equal to only 60% and 49% of males, respectively (Appendix, Table 20).

Females have higher representation in the Health Care and Social Assistance sector, but have a median wage level equal to only 74% of male wages. Female wages are closest to parity with male wages in the Retail Trade, and Administrative and Waste Services sectors, and actually exceed male wages in the Accommodations and Food Services sector. These three sectors carry the lowest median wages, however, meaning that parity in male and female wages is closest in the lowest paid portions of the economy.

A notable exception is in the Real Estate, Rental, and Leasing sector, where female workers earn almost double what male workers earn. Representation between genders is nearly equal.

Employment by Occupation

Industry sectors are by their nature broad and somewhat uninformative. A host of differing positions with differing knowledge bases and functions are contained within

each sector, no matter how narrowly defined. Information on actual occupations can supplement the information given by sector employment, or signal a knowledge base and skill set that is in demand across sectors.

Across broad occupational categories, approximately 51 percent of employment in Lincoln County is within Service Occupations, and Sales and Service Occupations (Appendix, Table 21), compared to 41 percent state-wide. Lincoln County's higher representation in these occupational categories may be due to the influence of tourism as an industry, as well as the larger percentage of the population that is 65 years of age or older. These occupations are also dominant in the Retail Trade and Accommodations and Food Services sectors, two of the highest employment (but lowest paid) sectors in the county (Appendix, Table 22).

Management, business, science, and arts occupations represent 27.4 percent of employment in the county. This occupational category includes Education, Computer, Engineering, and Science occupations, with educators in these fields included in the employment figures. However while this occupational category is important in Lincoln County, its representation lags behind the state and other comparison counties, with the exception of Tillamook County, in this area.

Table 22 in the Appendix shows the distribution of different occupational categories across the high employment sectors in Lincoln County. Generally, those sectors which have the highest percentage of their employment in Service, and Sales and Office occupations, have the lowest median wages. The sectors which have higher employment in the Management, Business, Science and Arts, and Production, Transportation, and Material Moving occupations, tend to have higher median wages (referring back to Appendix, Table 18).

Differences in gender representation across occupational categories can be identified (Appendix, Table 23). Women have the highest representation in Office and Administrative Support occupations, as well as in Personal Care and Services. Women dominate in Healthcare Support occupations and in Education, Training, and Library positions, where they hold 93 percent and 81 percent of full-time year-round positions, respectively.

Males hold the majority of positions in Architecture and Engineering, Natural Resources, Construction, and Maintenance, and Production, Transportation, and Material Moving occupations. There are no women reported as employed in full-time, year-round positions in Fire Fighting and Prevention, and Other Protective Services, or in Construction and Extraction, and Installation, Maintenance, and Repair occupations. These are traditionally occupations which have little gender diversity. However, in many cases these occupations also pay higher wages. Females trained and entering these occupations could improve their earning and employment potential.

Employment Projections

As previously discussed, the current highest employment sectors in Lincoln County are:

1. Accommodations and Food Services
2. Retail Trade
3. Health Care and Social Assistance, and
4. Manufacturing (including food).

Regional employment forecasts for Northwest Oregon, aggregating Benton, Clatsop, Columbia, Tillamook, and Lincoln counties, were recently released by the State of Oregon Employment Department (see Appendix, Table 24). The forecasts indicate that the above sectors will continue to be the highest employment sectors in the region, with the highest growth forecast to be in Construction, Food Manufacturing, Professional and Business Services, Education and Health, and Accommodations and Food Services. Small declines in regional employment in Logging and Paper and Wood Product Manufacturing are forecast.

Occupational forecasts released for the region at the same time indicate growth above ten percent in occupations related to food service and accommodations, as well as in most healthcare and personal service occupations. Most high growth areas are due to a majority of replacement openings, rather than indicating significant growth in demand (<https://www.qualityinfo.org>). Across sectors, administrative assistants and secretaries, and clerks of all kinds, register the largest declines in openings, with openings for secretaries and administrative assistants declining between 5 to 20 percent, depending on the sector of employment. The demand for data entry keyers is forecast to drop by as much as 25 percent (out of 60 openings in the five county region).

Employment forecasts have limitations, however, as they most frequently are based on projections by current employers and do not foresee the development of new occupations and shifts in sector employment. These can occur as technology and other factors influence changes in demand for skills and industry standards. The pace of technology has accelerated the birth of new occupations and the development of cross-functional skills, which can be difficult to match with industry classification codes and occupational categories that were derived decades ago.

Local Economic Development and Strategic Planning Initiatives

Lincoln County is faced with challenges as it pursues economic growth while preserving the character and beauty of its region. These challenges are common, in many instances, to rural areas with irregular topography and natural land barriers. The county, however, is also characterized by forward thinkers with numerous groups focused on planning and committed to supporting growth in their communities and across the county. These groups include:

The Oregon Coastal Zone Management Association (OCZMA) is a collaboration among local government and officials on the Oregon Coast. The group advocates with a united voice for coastal interests and issues, and conducts studies on coastal issues for better informed decision-making.

The Economic Development Alliance of Lincoln County is a partnership of public and private organizations and business members dedicated to enhancing the diversity of the county's economy, and improving the quality of local employment opportunities.

The Oregon Northwest Workforce Investment Board (ONWIB) is a regional workforce board that works with educational and industry partners in the region to meet the region's workforce needs.

The Yaquina Bay Economic Foundation (YBEF) supports growth and economic development in the greater Yaquina Bay Region. Its local membership is comprised of a cross section of public and private businesses and community leaders. This group was the driving force behind establishing Newport as a hub for ocean observing.

The combination of these strong collaborative, regional partnerships and more focused local interests enable rural communities to apply a regional approach to efforts without duplicating scarce resources, while also specializing in areas where local strengths exist. Communities within Lincoln County and different affiliated local groups participate in planning efforts and in many cases have developed their own strategic plans for their local areas. They also have representation on regional planning groups. Currently, strategic planning initiatives that may impact future sector growth and occupational employment include:

Lincoln City: The city has forecast, through its economic development group, that demand for tourism-related services and health-related services will grow over the next extended period. Based on employment forecasts, the city's development plans include new housing to help ease the coast-wide housing shortage, and new spaces to meet lodging and restaurant demand, as well as office space for health and professional services.

City of Newport: The Greater Newport Area Vision 2040, the city's long-range strategic plan, identifies key strategies to diversify the area economy and to create new, living wage employment opportunities. These strategies emphasize the existing assets in the region in marine industries and science, including the Port of Newport, the new International Terminal, and the Marine Science center, while also recognizing the potential of the OSU Marine Studies Initiative to boost economic development. The Newport plan envisions for the future "a hub for scientific research, ocean observation, education, and utilization and conservation activities."

City of Waldport: In 2017 the city completed a master plan for the development of a 160-acre industrial park. The plan is part of the city's strategic goal to continue to

develop opportunities for new, living wage employment. The plan maps out improvements to the site which are planned over the next 20 years, including road, water, and sewer improvements. An adjacent rail line offers the potential of supply and finished product transportation as well.

Economic Development Alliance of Lincoln County: In 2012 the Alliance received the commissioned report, “Economic Development Strategy for Marine Related Industries,” which was funded through a Department of Commerce grant. The goal of the report was to identify marine-related businesses in the area, gain information on their long-term business plans and employment patterns, and connect these business owners with resources to support their growth. The report represents the first formal attempt to identify and evaluate the economic impact of this sector, which is not independently identified in industry classification codes. Citing the county’s three ports and the Depoe Bay harbor as the most important sources of future economic growth, the report recommends the expansion of the marine sector and continuation of efforts to identify and provide support to local businesses and entrepreneurs in these industries.

Oregon State University and Marine Studies Initiative (MSI): Building on the strong reputation OSU has established in marine science studies and research, the ten-year (2016-2025) MSI has three over-arching goals:

- provide a transformational educational experience centered on marine studies
- advance leadership in transdisciplinary marine research and scholarship, and
- increase societal impact from marine studies in Oregon and beyond.

Studies of the marine environment, the management of its resources and valuable habitats, and the interaction of climatic influences impact a broad variety of disciplines, including economics and public policy. Educational offerings will be expanded at the Hatfield Center to support a new, cross-disciplinary degree in Marine Sciences that integrates studies in natural and social sciences and will build on existing partnerships with OCCC, high schools, and other community colleges.

Already utilized by government and academic researchers, the Marine Science Center is envisioned to become a global, collaborative research hub. A new research, teaching, and outreach facility is currently under construction, with a projected completion date of January 2020. When completed, the building will serve as the headquarters for the new Marine Studies program, the university’s Marine Mammal Institute, and its marine genetics and genomes programs, and include an auditorium and space for community education events. OSU’s plans anticipate serving up to 500 students annually at the new location.

Port of Toledo: The Port recently completed its Strategic Plan for the development of the area into the year 2024. Plans include the further development of an industrial park site, expansion of the boatyard and its capabilities, and to “promote the development of a marine skills training center and apprenticeship program.” The

potential for the boatyard to work with OSU to support the construction and operation of a wave energy test project offshore is cited in this plan, as is the possibility of capitalizing on the demand for data and internet related services by renting facilities to data centers and startups in this field.

Multiple strategic planning initiatives in the county, therefore, call for the development of new living wage occupations, while recognizing the continuing importance of the existing economic base. Ocean research and marine industries are anticipated to generate growth and economic demand. Infrastructure projects to support the expansion of existing marine and maritime assets are underway or in the final planning stages. The growing economic importance of this sector is reflected in the clustering of educational and research activities around Yaquina Bay and the Port of Newport:

Oregon Coast Aquarium: While the aquarium is a top tourist attraction, it also serves as an environmental and educational resource, with more than 40,000 students visiting each year. Educational programs, tours and exhibits raise awareness of habitat and wildlife conservation and the need to preserve and protect the marine environment.

OSU Hatfield Marine Science Center: Supported by state and federal funding, the center is a primary field station for the university's College of Oceanic and Atmospheric Sciences and a collaborative research hub for government and university scientists. Research studies are supported by OSU research personnel and vessels. The Center also provides short classes and educational programs with a focus on the marine science area.

OCCC's Aquarium Science Program provides a two-year Associate of Applied Science degree and a one-year Certificate in the field. Students completing the curriculum qualify to work in the aquatic animal care profession across a variety of research, commercial, and private facilities. As the OSU Marine Studies Initiative develops, there is a potential of synergy with the Aquarium Science program at the community college, with internships and collaboration on research projects and prospective articulation with the OSU program.

The Oregon Museum of Science and Industry (OMSI)'s Coastal Discovery Center, in close proximity to the Marine Science Center, is the new home of OSI's coastal education programs. Multi-day science camps are offered for grades 1-12 in the spring and fall, with the ability for OSI educators to design single, three-day, or five-day camps centered around a variety of topics of interest in the Marine Sciences fields.

NOAA Pacific Marine Operations Center (MOC): The Marine Operations Center employs approximately 110 marine officers and a total of 175 personnel. Four ships are based at the center, with support for two more roving vessels. The center supports NOAA's Pacific fleet which is responsible for data collection on the marine environment, fish stocks, and climate processes.

Newport Research Station, part of NOAA's Northwest Fisheries Science Center (NFSC): NOAA's presence at the Port of Newport also supports the Northwest Fisheries Science Center, serving Alaska and the Northwest in research on factors affecting fishery environments and habitats. While the NFSC is headquartered in Seattle, the Newport station is the Northwest Fisheries' only ocean-based port.

United States Coast Guard (USCG) station: The USCG has maintained a maritime search and rescue (SAR) and law enforcement station in Yaquina Bay for more than 100 years. The station employs more than 60 active duty and reserve personnel, who participate in more than 300 SAR missions and investigate more than 200 cases per year. Their operations are supported by a fleet of marine and ocean-going vessels, with air capabilities provided by the USCG Newport Air facility.

Opportunities to Support Regional Economic Development

Lincoln County's topography, as previously mentioned, does not support a large agricultural base. Since most of the usable land is centered along the coastline and river valleys of the county, its primary current employment opportunities lie within occupational clusters that are aimed at serving the needs of the current population or serving the stream of year-round visitors to the county's coastline and rivers, fishing and shellfish harvesting opportunities, and wildlife watching.

Due to the composition of the current population and the current existing opportunities in the business and industry map, the county's healthy economic future will benefit from attracting new working age population residents and from improving the employment opportunities of its current residents, in particular those with lower educational attainment levels. This means capitalizing on existing opportunities (further development of opportunities to attract new residents) and, looking to the future, the development of new employment fields that would attract new workers and provide good living wages.

A critical part of OCCC's mission is to enhance the economic vitality of its region, providing educational pathways to relevant, living wage occupations for its students and community. The community college supports the Healthcare and Social Assistance industry sector with robust offerings in Nursing, Certified Nursing Assistant, Practical Nursing, and Medical Assisting. The college also offers a certificate in Emergency Medical Services. High school students have the opportunity to apply for competitive positions in the Certified Nursing Assistant Career Pathway Certificate program. The Nursing program culminates in an Associate of Applied Science degree, and qualifies students to take the National Licensure Exam to become a Registered Nurse.

Occupational demand in Accounting and Business occupations is served through an Associate of Science degree in Business, and an Associate of Applied Science degree

in Accounting. One-year certificates providing entry-level skills are another option provided in these fields.

Challenges in the recruitment and retention of K-12 teachers in the county led to the development of OCCC's Rural Teacher Education Program and Early Childhood Education certificate, a partnership between the community college, Lincoln County School District, and Western Oregon University. The program addresses the growth in demand for educational services and teachers in the county, with some courses delivered and received remotely in a collaboration with Tillamook Bay Community College.

Above-entry level and management positions in the Accommodations and Food Service and Retail Trade sectors benefit from studies in OCCC's Accounting and Business programs. Median wage levels for entry-level positions in this sector, as discussed earlier in this report, are below the MIT Living Wage and Subsistence levels for Lincoln County, and hover at minimum wage level requirements.

With the flexibility gained through independence, the college will be able to explore the expansion of its offerings in some areas and also the feasibility of developing new programs, particularly in Career Technical Education. In consideration of both the constraints presented by the first years of independence and of the college's commitment to supporting economic development in the region, this report's findings indicate that opportunities exist to support growth in the newly designated Maritime Sector, and to provide cross-industry, cross-occupational support in the area of technology skills and applications. Educational offerings in these areas provide pathways to higher wage occupations, a stated goal for many community interests.

This report also finds significant gender disparities in median wage levels across the county. Portions of the county population have low educational attainment levels, corresponding with low earning potential and high poverty risk.

Maritime Sector

Until recently, because this sector was not independently defined in the federal industry classification codes, its true economic impact was difficult to gauge. Building on the seeds established in the earlier "Economic Development for Marine Related Industries" report commissioned by the Economic Development Alliance of Lincoln County, in 2017 the Oregon Senate Bill 867 established the Maritime Workforce Task Force to "study and develop a description of the scope and extent of the Maritime sector workforce in Oregon."

The Governor-appointed Task Force was chaired by Lincoln County Commissioner Doug Hunt, with state legislative membership including State Senator Betsy Johnson, State Representatives David Gomberg and David Brock Smith. Task Force members included broad representation from business and industry, with higher education

represented by Oregon Coast and Clatsop Community Colleges and Oregon State University.

The Task Force recently concluded its work, which included the acceptance of the task force-commissioned “Oregon’s Maritime Workforce Sector Report” from the state Employment Department. The designation of a Maritime sector in Oregon was approved, making it eligible for collaborative state workforce development projects and support.

The Maritime Workforce Sector Report indicates that, while occupations in this sector do not currently have high growth rate in new openings, the average age of the work force is high, with a large percentage of replacement openings anticipated in coming years (openings due to retirement rather than employer expansion). The Oregon Employment Department estimates that 27% of positions held in this sector are held by workers aged 55 years or older, with the highest pending retirement rates in the water transportation, ship and boat building, and seafood product packaging and manufacturing industries. State-wide, the average annual wage in this sector in 2017 was \$60,853, almost 20% higher than the state-wide average wage (Oregon Employment Department Maritime Sector Workforce data).

County-wide data on employment in these industries is not yet available. However, these jobs are important to the economy of Lincoln County, with employment in this sector representing 6.5% of the total workforce, and the strategic planning initiatives throughout the county indicate there is strong growth potential in this sector. The Oregon Employment Department projects that over the next ten years the Maritime Sector workforce will expand by 5 percent, with 16 replacement workers needed due to retirements for every one opening due to expansion.

The Maritime Construction sub-sector encompasses mastery of a wide variety of technical skills, such as Welding, Electrical Installation, Sheet Metal Work, and Metal Fabrication. With the breadth of occupations imbedded within the sector, talks have centered on serving this sector efficiently through state-wide and regional cooperation. This approach would maximize resources and have a greater impact on workforce development state-wide. Community colleges in service areas with existing infrastructure and workforce in a relevant Maritime sub-sector would focus on providing training and skills development to that sub-sector. Current discussions involve Lincoln County and Oregon Coast Community College providing support to occupations within the Maritime Construction segment.

In many cases mastery of these skills requires, first, the mastery of a knowledge base and skills set that is common to the technical field when applied across industry sectors. Subsequent coursework that is specific to the industry environment can supplement this basic knowledge and skills set and make it applicable to employment and specialization in the Maritime Construction environment. The potential exists for the college to step gradually into this sector, first establishing courses in entry level skills in a specific field

that can serve the entire region, and then, as a student base for these classes is established, moving into the development of specialty classes for the Maritime Construction sector.

Technology

The pervasive nature of big data, statistical analysis, and digital technologies across all occupational areas means that these skills will continue to grow in demand. The current labor force is unable to meet demand for coding skills, data analysis, cloud computing, and digital marketing. For entry level employees, technical skills can provide a hiring advantage; for a growing number of occupations, these skills are required to function. In most cases the skills and base knowledge are shared across occupations, with specialty applications and tasks developed after entry level. Therefore courses within this area have the ability to support multiple degrees and occupational areas, with specialty courses supported through smaller certificates or single courses.

Digital Marketing is a potential program area, with the high reliance on tourism and large number of small businesses, accommodations and food service establishments all needing to promote their businesses. Data and system security is a growing concern for all enterprises, whether large or small, with malware and ransomware attacks becoming increasingly prevalent. There are multiple occupational specialties for entrepreneurs supported within this field as well, and online or remote instruction is well suited to most course and project work. OCCC is currently utilizing remote instruction technologies and online instruction to enhance educational access to residents throughout the county and provide flexibility, and several county high schools provide CTE coursework in Digital Media.

The Computer and Digital Technologies field represents a potential area for thoughtful and intentional program design, whether utilizing industry certifications, embedded coursework in existing degrees, or a two-year degree. Depending on the strategy, the current program for Administrative Assistants might be adaptable and provide an evolutionary framework for initial coursework. The use of online or remote instruction can increase access and maximize the use of existing college resources, without the requirement of a large capital investment in equipment as is typical of many CTE programs.

Gender Disparities

While the presence of gender disparities in income levels is not unique to Lincoln County, median earnings exhibit significant inequities between males and females county-wide. There are many factors influencing this. Statistics on male/female representation in occupational clusters indicate that females tend to have higher representation in lower paying Sales and Service Occupations. As the college explores implementation of new programs, outreach and marketing efforts should include and seek to be targeted to females. This may assist in improving female representation in higher paid, more technical occupations.

Improving Educational Attainment Levels

Lincoln County residents who are older than 25 and less than high school graduates experience a high poverty rate (29%), with poverty incidence even higher in the female portion of this population (33.3%). Many of the households in Lincoln County who are living in poverty have children under 18 years of age. Individuals in these circumstances experience numerous barriers that inhibit their ability to pursue more education.

High school completion services tend to be “high-touch” services in rural counties, with low student enrollment and a need for individualized instruction. Resources that would enable the college to have more effective outreach to this population and a closer working relationship with service providers in the county would increase awareness of OCCC’s high school completion program and potentially increase the county-wide high school completion rate.

There is high interest at the state and national level in integrated instruction, with introductory coursework in technical fields woven into basic skills and GED coursework. Some colleges in Oregon are experiencing success with this approach, which experiences more ease of implementation at large colleges with high student enrollment and a wide variety of programs to offer students integrated learning opportunities.

The data in this report strongly suggest that, in Lincoln County, higher educational attainment levels are associated with higher earnings. While many residents 25 years of age or older have completed some college coursework, a relatively small percentage have completed an Associate’s degree. Many of these individuals may be able to complete a few courses and complete a two year degree, thus increasing their earning potential.

With OCCC independence will come the ability to better track current students and to identify under-served areas in the community for improved outreach. Completing the implementation of the new data system will further improve these capabilities and permit access to data across functional areas within the college.

Challenges and Opportunities

The initial years of OCCC’s accreditation as an independent college will bring a high demand on administrative functions and student support services, as new functions, systems, and processes need to be adapted and implemented. As a small rural college, OCCC does not have excess staff capacity, nor is it large enough to experience economies of scale. Therefore, these new functions and responsibilities will be absorbed to the extent possible by existing staff. As the newly accredited college assumes these functions and reporting responsibilities, the effective use of technology systems and applications may help reduce the strain on the college’s human resources, and preserve time for one-on-one interaction with students, a hallmark of the culture at the college. Additional staff may need to be recruited to maintain the level of service

students are accustomed to, and to provide a full complement of student support services.

The continued, progressive implementation of the new data and records system will give the college an enhanced ability to track its own students and improve assessment of student outcomes. Better informed decision-making will enable the college to more accurately identify student needs, design services to address them, and track the effectiveness of these efforts.

New projects and initiatives adopted during the period immediately following independence will need to be evaluated strategically with careful attention to capacity and resource availability. The stability of funding at the state level continues to be uncertain, although funding for specific initiatives and CTE programs exists. Interest in CTE programs at the federal level continues to be strong, but within a volatile and uncertain environment, with unpredictable regulatory and policy priorities.

Multi-year grant opportunities, if pursued and awarded, could support the college during these initial years of independence and give it a strong foundation for future growth. Outside funding would enable the college to fund new services and instructional offerings, and introduce initiatives that would be difficult to implement during this period with the multiple new implementation demands on the college budget.

Economic development interests at the local, regional, and state level have identified the Marine and Maritime sectors to be economically important particularly in coastal counties and along the Columbia River waterway. OCCC is located at the hub of the county's Marine and Maritime research, educational, commercial, and recreational activities, with a strong foundation already in place to support program and economic development in this area. Multi-year funding that provides funds for curriculum development and program needs could provide new, fledgling offerings time to develop into sustainability, and moderate the risk of initial program investment for the college.

The college has pursued its path toward independence with a consistent commitment to student success and the creation of a responsive and caring culture that draws the best from each individual. Programs and services that preserve this philosophy will continue to serve the college community well.

Works Referenced or Cited

Civil West Engineering Services, Inc. (2017). *City of Waldport Industrial Park Master Plan*.
<https://www.waldport.org/Documents/pdf%20files/Industrial%20Park%20MP.pdf>

Cogan Owens Greene, FCS Group, and Fregonese Associates. (2017). *City of Lincoln City Economic Opportunities Analysis and Housing Needs Analysis*.
[http://lincolncityor.govoffice3.com/vertical/sites/%7BDDC39B4D-9F7A-4251-AEA0-F594E7F89DDB%7D/uploads/LINCOLN_CITY_EOA-HNA-BLI -
_FINAL WITH APPENDIX\(1\).pdf](http://lincolncityor.govoffice3.com/vertical/sites/%7BDDC39B4D-9F7A-4251-AEA0-F594E7F89DDB%7D/uploads/LINCOLN_CITY_EOA-HNA-BLI_-_FINAL_WITH_APPENDIX(1).pdf)

Confederated Tribes of Siletz Indians. (Accessed electronically December 2018 – January 2019). Confederated Tribes of Siletz Indians History and Culture.
<http://www.ctsi.nsn.us/chinook-indian-tribe-siletz-heritage/>

Dean Runyon Associates. (2018). *Oregon Travel Impacts, Statewide Estimates, 1992-2017*. Prepared for the Oregon Tourist Commission. www.traveloregon.com

Glasmeier, A. (Accessed electronically December 2018 – January 2019). MIT Living Wage Calculator. Retrieved from livingwage.mit.edu

HDR Consulting, Newport City Council and Greater Newport Area Vision 2040 Advisory Committee, 2017. Greater Newport Area Vision 2040.
https://www.newportoregon.gov/dept/cdd/documents/Vision2040/Vision2040_Final_Draft.pdf

Oregon Department of Education. (2018). Lincoln County School District and Lincoln County Schools Fall Membership Reports, 2017-2018. <https://www.oregon.gov/ode/reports-and-data/Pages/default.aspx>

Oregon Department of Education. (2018). Lincoln County School District 2017-18 Report Card. <https://www.oregon.gov/ode/schools-and-districts/reportcards/reportcards/Pages/default.aspx>

Oregon Employment Department. *Northwest Oregon Occupational Employment Projections, 2017-2027*. www.qualityinfo.org

Oregon Employment Department (2017). *The Employment Landscape of Rural Oregon*. www.Qualityinfo.org

Oregon State University, *OSU Marine Science Initiative Strategic Plan*,
http://sites.oregonstate.edu/oversize-uploads/MSI%20Strategic%20Plan_FINAL_high-v2.pdf

Population Research Center. (2017). *Coordinated Population Forecast, 2017 through 2067, Lincoln County*. Portland State University, Portland, OR.

Port of Newport. (2013). *Port of Newport Strategic Business Plan and Capital Facilities Plan*, January 2013. <https://www.portofnewport.com/2013-strategic-business-plan-capital-facilities-plan>

Port of Toledo. (2018). *Port of Toledo Strategic Business and Capital Investment Plan*
<https://www.portoftoledo.org/strategic-plan>

The Oregon Community Foundation, 2017. *Toward a Thriving Future: Closing the Opportunity Gap for Oregon's Kids*.

The Research Group LLC, 2014. Ten Year Update on Lincoln County, Oregon's Economy. Prepared for Lincoln County Commissioners, Newport, Oregon. August 2014.

Willer, C., and Bauman, C., 2012. *Economic Development Strategy for Marine Related Industries*. Prepared for Economic Development Alliance of Lincoln County.
<http://www.coastbusiness.info/pdfs/EDALC-Marine-EDApublish.pdf>

APPENDIX

External Environmental Scan – Lincoln County

*January 2019
Oregon Coast Community College
Office of Instruction
Newport, Oregon*

APPENDIX

Table of Contents

Table 1: Lincoln County Population by Gender, 2013 – 2017	3
Table 2: Incorporated Cities in Lincoln County, Population Change, 2013 to 2017 Estimates	3
Table 3: Lincoln County Population by Race/Ethnicity (Estimates), 2013 - 2017.....	3
Table 4: Lincoln County Population Age Distribution, 2013 – 2017	4
Table 5: Lincoln County, Level and Composition of Personal Income, 2013-2017	5
Table 6: Components of Personal Income by Percentage, Oregon, Lincoln, and Selected Counties, 2017	6
Table 7: Statewide and Lincoln County School District Students by Self-reported Race and Hispanic/Latino Identification, 2014-2018.....	8
Table 8: Self-reported Race and Hispanic/Latino Identification: OR Schools, LCSD, and Lincoln County High Schools, 2017-18	8
Table 9: Oregon and Lincoln County Educational Attainment Levels, Overall and by Age Group, 2013-2017	9
Table 10: Educational Attainment Levels by Self-reported Race, Hispanic/Latino Identification and Gender, Lincoln County Population, 18 Years and Older, 2017.....	10
Table 11: Per Capita Income and Median Earnings, Total and by Gender, Lincoln County and Oregon, 2013 to 2017.....	11
Table 12: Comparative per Capita Income and Median Earnings, Oregon, Lincoln and Selected Counties, 2017	11
Table 13: Lincoln County 2017 Percentage Income Distribution by Income Range, Total and by Gender (Past 12 Months for Full-time Year-round Workers).....	12
Table 14: Lincoln County Median Income in the Past 12 Months by Self-reported Race and Hispanic or Latino Identification, 2017.....	13
Table 15: Lincoln County Median Earnings by Education Level and Gender, 25 Years and Older, 2017	13
Table 16: Lincoln County Educational Attainment Levels and Poverty Rates, 25 Years and Older, Total and by Gender, 2017 Estimates	14
2017 Federal Poverty Guidelines	15
Table 17: Oregon and Lincoln County by Self-reported Race and Hispanic or Latino Identification - Distribution at 50%, 100%, and 125% Poverty Levels, 2017	15
Table 18: Highest Industry Employment Sectors and Median Annual Wage, Lincoln County, 2017.....	16
Table 19: Comparative Median Annual Wage Levels in Top Employment Sectors in Lincoln County, State of Oregon and Surrounding Counties	17

Table 20: Employment and Median Annual Wage Levels in Top Employment Sectors in Lincoln County by Gender, 2017 17

Table 21: Occupation, Civilian Employed Population (16 years and over), OR, Lincoln, and Selected Counties, 2017 18

Table 22: Lincoln County Industry Sector Employment – Distribution by Occupational Category (Full-time and Part-time), 2017 19

Table 23: Occupation Categories by Gender for Full-time Year-round Civilians, 16 Years and Older, Lincoln County 2017 Estimates 20

Table 24: Regional Industry Employment Forecast, 2017-2027 (Benton, Clatsop, Columbia, Lincoln and Tillamook Counties) 22

Table 1: Lincoln County Population by Gender, 2013 – 2017

Lincoln County Population and Gender Distribution, 2013 to 2017					
	2013	2014	2015	2016	2017
Total	46,318	46,349	47,051	47,897	48,920
Growth Rate		0.0%	1.5%	1.7%	2.1%
Male	48.6%	48.4%	48.2%	48.3%	48.2%
Female	51.4%	51.6%	51.8%	51.7%	51.8%

Source: US Census American Community Survey, 2017. <https://factfinder.census.gov>

Table 2: Incorporated Cities in Lincoln County, Population Change, 2013 to 2017 Estimates

	2013	2017	%age Change	Numerical Change
Depoe Bay	1,397	1,472	5.36%	75
Lincoln City	8,332	8,905	6.87%	573
Newport	10,083	10,592	5.0%	59
Siletz	1,202	1,267	5.4%	65
Toledo	3,462	3,604	4.1%	142
Waldport	2,080	2,198	5.67%	118
Yachats	698	757	8.45%	59
Outside Urban (City) Growth Boundaries	19,064	20,125	5.56%	1,061
Total Lincoln County	46,318	48,920	5.38%	2,602

Source: US Census American Community Survey, 2017. <https://factfinder.census.gov>

Table 3: Lincoln County Population by Race/Ethnicity (Estimates), 2013 - 2017

	2013	2014	2015	2016	2017
Total	46,318	46,349	47,051	47,897	48,920
Race Alone or in Combination with one or more other races:					
American Indian/Alaskan Native	2.3%	2.7%	3.0%	2.9%	2.8%
Asian	1.3%	1.3%	1.2%	1.2%	1.2%

Black or African American	0.3%	0.3%	0.3%	0.4%	0.4%
Native Hawaiian/other Pacific Islander	0.6%	0.1%	0.2%	0.2%	0.2%
White	83.8%	83.5%	83.3%	82.9%	82.9%
Some Other Race	0.2%	0.3%	0.2%	0.2%	0.0%
Two or More Races	3.3%	3.5%	3.4%	3.6%	3.6%
Hispanic or Latino Ethnicity*	8.1%	8.3%	8.4%	8.6%	8.9%

Source: US Census American Community Survey, 2017. Source:

<https://factfinder.census.gov/> .

*Note: “Hispanic” is considered an ethnicity, rather than a race. The proportion of the population reporting Hispanic ethnicity is presented here; however, the race that these individuals claim is represented in the reported racial identifications. Therefore the percentages including those reporting Hispanic ethnicity will add up to more than 100%.

Table 4: Lincoln County Population Age Distribution, 2013 – 2017

Age Category	2013	2014	2015	2016	2017
0 to 19 years of age	19.0%	19.0%	18.9%	18.9%	18.9%
20-24 years of age	4.7%	4.6%	4.5%	4.2%	4.1%
25-44 years of age	20.2%	20.0%	19.8%	19.9%	19.9%
45-54 years of age	12.7%	12.3%	12.1%	11.7%	11.3%
55-64 years of age	19.5%	19.1%	18.8%	18.5%	18.4%
65 years of age or older	23.9%	25.0%	26.0%	26.7%	27.4%
Total	46,318	46,349	47,051	47,897	48,920
Median Age	50.5	50.9	51.3	51.4	51.6

Source: US Census American Community Survey, 2013-2017,

<https://factfinder.census.gov/> .

NOTE: Percentages may total more than 100.0% due to rounding.

Table 5: Lincoln County, Level and Composition of Personal Income, 2013-2017 (not adjusted for inflation)

	2013		2014		2015		2016		2017	
	\$	%	\$	%	\$	%	\$	%	\$	%
Earnings by Place of Work	968,522	57.8 %	998,285	56.7 %	1,041,088	55.8 %	1,084,192	55.8 %	1,137,265	56.1 %
Less: Contributions for Government Social Insurance	125,936	7.5%	131,406	7.5%	136,588	7.3%	143,629	7.4%	153,327	7.6%
(Employee and Self-employed Contributions for Government) +	67,846	4.0%	70,828	4.0%	74,018	4.0%	78,417	4.0%	83,954	4.1%
(Employer Contributions for Government Social Insurance)	58,090	3.5%	60,578	3.4%	62,570	3.4%	65,212	3.4%	69,373	3.4%
Plus: Adjustments for Residence	346	0.0%	971	0.1%	1,881	0.1%	3,058	0.2%	2,733	0.1%
Equals: Net	842,932	50.3 %	867,850	49.3 %	906,382	48.6 %	943,621	48.5 %	986,671	48.7 %

Earnings by Place of Residence										
Plus: Dividends, Interest, and Rent	362,858	21.7 %	394,834	22.4 %	425,084	22.8 %	445,843	22.9 %	468,245	23.1 %
Plus: Personal Current Transfer Receipts	470,029	28.0 %	498,053	28.3 %	533,681	28.6 %	554,940	28.5 %	572,698	28.2 %
Equals: Total Personal Income	1,675,819		1,760,737		1,865,146		1,944,404		2,027,614	

Source: US Bureau of Economic Analysis Regional Data. Note: Total personal income equals Net Earnings by Place of Residence, plus any income from investments (Dividends, Interest, and Rent) and Personal Transfer Receipts (pension payments, social security payments, etc. Net earnings by place of residence are derived by the sum of wages from employment (minus contributions to government social insurance, whether by employer or employee, since these payments do not constitute actual personal income), plus any adjustments for place of residence (for example, people who work in Lincoln County but live in another – in this case the income would count as personal income in the employee's place of residence).

Table 6: Components of Personal Income by Percentage, Oregon, Lincoln, and Selected Counties, 2017 (Thousands of Dollars)

	Oregon	Multnomah	Lincoln	Benton	Linn	Clatsop	Tillamook	Lane
Earnings by Place of Work	72.1%	96.2%	56.1%	70.1%	58.7%	68.5%	55.0%	64.7%
Less: Contributions for Government Social Insurance (Social	9.0%	11.8%	7.6%	8.4%	7.8%	8.8%	7.1%	8.2%

Security, Medicare, etc.) by employee, employer, and self-employed								
Plus: Adjustments for Residence	-2.4%	-19.1%	0.1%	-1.8%	5.0%	-5.8%	0.3%	-0.4%
Equals: Net Earnings by Place of Residence	60.8%	65.3%	48.7%	59.9%	55.8%	54.0%	48.2%	56.0%
Plus: Dividends, Interest, and Rent	20.3%	20.5%	23.1%	26.0%	15.8%	20.8%	23.5%	21.0%
Plus: Personal Current Transfer Receipts	18.9%	14.2%	28.2%	14.1%	28.4%	25.3%	28.3%	23.0%
Equals: Total Personal Income	199,422,200	43,873,915	2,027,614	4,117,613	5,049,370	1,675,987	1,112,351	16,275,163

Source: US Bureau of Economic Analysis Regional Data

Note: Total personal income equals Net Earnings by Place of Residence, plus any income from investments (Dividends, Interest, and Rent) and Personal Transfer Receipts (pension payments, social security payments, etc).

Net earnings by place of residence are derived by the sum of wages from employment (minus contributions to government social insurance, whether by employer or employee, since these payments do not constitute actual personal income), plus any adjustments for place of residence (for example, people who work in Lincoln County but live in another – in this case the income would count as personal income in the employee's place of residence).

Table 7: Statewide and Lincoln County School District Students by Self-reported Race and Hispanic/Latino Identification, 2014-2018

	2013-14		2014-15		2015-16		2016-17		2017-18
	OR	LCSD	OR	LCSD	OR	LCSD	OR	LCSD	OR
American Indian/Alaskan (Non-Hispanic)	1.6%	7%	1.5%	6%	1.4%	5.8%	1.4%	5.0%	1.3%
Hispanic (Non-Hispanic)	3.9%	1%	3.9%	1%	3.9%	0.9%	4%	1.0%	4.0%
Native Hawaiian/Pacific Islander (Non-Hispanic)	0.7%	0%	0.7%	0%	0.7%	0.2%	0.7%	0.2%	0.7%
African American (Non-Hispanic)	2.4%	1%	2.4%	1%	2.4%	0.8%	2.4%	0.7%	2.3%
Hispanic/Latino	22.0%	18%	22.4%	19%	22.5%	19.4%	22.6%	20.9%	23.0%
White (Non-Hispanic)	64.1%	67%	63.6%	66%	63.4%	65.7%	63%	64.9%	62.4%
Other (Non-Hispanic)	5.2%	6%	5.5%	7%	5.7%	7.2%	5.9%	7.3%	6.1%

Source: Lincoln County District and Lincoln County School Fall Membership Reports, 2017-2018.

Table 8: Self-Reported Race and Hispanic/Latino Identification: OR Schools, LCSD, and Lincoln County High Schools, 2017-18

	American Indian/Alaskan Native	Asian	Native Hawaiian/Pacific Islander	Black/African American	Hispanic/Latino
Oregon (all grades)	1.3%	4.0%	0.7%	2.3%	23.0%
Lincoln County School District (all grades)	4.6%	1.0%	0.3%	0.6%	22.0%
Eddyville Charter School	4.1%	0.0%	0.0%	0.0%	7.7%

Lincoln City Career Technical High School	6.0%	0.0%	0.0%	2.0%	4.0%
Newport High School	2.2%	2.1%	0.4%	0.9%	27.5%
Siletz Valley Early College Academy	39.8%	1.2%	0.0%	0.0%	6.0%
Taft High School	2.4%	1.5%	0.4%	0.6%	26.5%
Toledo Senior High School	7.8%	1.0%	0.0%	0.0%	11.5%
Waldport High School	1.1%	1.7%	0.6%	0.6%	11.5%

Source: Lincoln County District and Lincoln County School Fall Membership Reports, 2017-2018.

Table 9: Oregon and Lincoln County Educational Attainment Levels, Overall and by Age Group, 2013-2017

	2013		2014		2015		2016		2017	
	OR	Linc.Co.	OR	Linc.Co.	OR	Linc.Co.	OR	Linc.Co.	OR	Linc.Co.
Percent High School Graduate or Higher	89.4%	89.9%	89.5%	88.4%	89.8%	88.8%	90.0%	89.3%	90.2%	89.4%
Percent Bachelor's Degree or Higher	29.7%	24.4%	30.1%	24.3%	30.8%	23.7%	31.4%	23.0%	32.3%	24.1%
Population 18 to 24 years										
Less than High School Graduate	15.5%	22.0%	14.2%	23.7%	13.9%	21.1%	13.4%	17.5%	13.9%	15.2%
High School Graduate (includes GED)	29.8%	44.5%	29.5%	44.1%	29.8%	47.4%	29.8%	44.2%	30.0%	44.2%
Some College or Associate's Degree	47.6%	28.6%	48.6%	25.9%	48.1%	26.6%	48.2%	33.8%	47.2%	35.0%

Bachelor's Degree or Higher	7.6%	4.8%	7.7%	6.2%	8.1%	4.9%	8.7%	4.5%	8.9%	5.6%
Population 25 Years and Over										
Less than 9 th Grade	4.0%	3.0%	4.1%	3.5%	4.0%	3.0%	3.9%	2.6%	3.8%	2.8%
9 th to 12 th grade, no diploma	6.6%	7.1%	6.5%	8.1%	6.2%	8.1%	6.2%	8.2%	6.0%	7.7%
High School Graduate (includes GED)	24.6%	28.6%	24.5%	28.1%	24.3%	28.1%	23.9%	29.8%	23.4%	28.7%
Some College, no Degree	26.9%	29.3%	26.6%	28.3%	26.3%	28.6%	26.2%	27.9%	25.8%	28.1%
Associate's Degree	8.2%	7.6%	8.2%	7.6%	8.4%	8.4%	8.5%	8.6%	8.7%	8.6%
Bachelor's Degree	18.7%	15.4%	18.9%	14.7%	19.3%	14.0%	19.6%	13.6%	20.1%	14.6%
Graduate or Professional Degree	11.0%	9.0%	11.2%	9.6%	11.5%	9.7%	11.9%	9.4%	12.2%	9.5%

Source: American Community Survey, 2017 Estimates. <https://factfinder.census.gov> .

Table 10: Educational Attainment Levels by Self-reported Race, Hispanic/Latino Identification and Gender, Lincoln County Population, 18 Years and Older, 2017

	Total Representation (Lincoln County Population, 18 Years and Older)			Males (18 Years and Older)			Females (18 Years and Older)		
	Total (#)	High School Completion or Higher	Bachelor's Degree or Higher	Total (#)	High School Completion or Higher	Bachelor's Degree or Higher	Total (#)	High School Completion or Higher	Bachelor's Degree or Higher
Population 18 Years and Older	39,149	89.4%	24.1%	18,633	88.4%	23.9%	20,516	90.4%	24.2%
White	33,046	90.3%	24.4%	15,643	89.2%	24.5%	17,403	91.4%	24.5%
White, not Hispanic or Latino	31,719	90.9%	24.7%	14,974	89.8%	24.8%	16,745	91.9%	24.8%
African-American alone	128	95.3%	9.4%	83	92.8%	14.5%	45	100.0%	10.0%
Native American or Alaskan Native	891	80.7%	5.6%	458	86.0%	8.3%	433	75.1%	4.2%
Asian	433	96.5%	53.8%	132	100.0%	59.8%	301	95.0%	48.8%
Hawaiian and Other Pacific Islander	37	100%	37.8%	12	100.0%	0.0%	25	100.0%	40.0%
Other Race alone*	550	33.3%	9.3%	324	42.3%	10.5%	226	20.4%	6.2%

ore Races	1,127	93.3%	25.1%	409	92.9%	19.8%	718	93.6%
or Latino Origin	2,089	65.5%	14.6%	1,077	67.1%	16.0%	1,012	63.7%

Source: American Community Survey, 2017 Estimates. <https://factfinder.census.gov> . Educational attainment data are tabulated for people 18 years old and over. Respondents are classified according to the highest degree or the highest level of school completed. The question included instructions for persons currently enrolled in school to report the level of the previous grade attended or the highest degree received. High school equivalency is counted as high school completion. *NOTE: "Some Other Race" designation includes all other responses not included in the "White," "Black or African American," "American Indian or Alaska Native," "Asian," and "Native Hawaiian or Other Pacific Islander" race categories described above. Respondents reporting entries such as multiracial, mixed, interracial, or a Hispanic, Latino, or Spanish group (for example, Mexican, Puerto Rican, Cuban, or Spanish) in response to the race question are included in this category.

Table 11: Per Capita Income and Median Earnings, Total and by Gender, Lincoln County and Oregon, 2013 to 2017

	2013		2014		2015		2016		2017	
	Lincoln	Oregon	Lincoln	Oregon	Lincoln	Oregon	Lincoln	Oregon	Lincoln	Oregon
Per Capita Income (\$)	25,194	26,809	25,130	27,173	25,124	27,684	24,593	28,822	25,782	30,410
Median Earnings for Workers (\$)	23,482	27,049	23,576	27,230	23,264	27,582	22,982	28,853	24,603	30,442
Median Earnings for Male, Full-time, Year-round Workers (\$)	43,532	48,175	40,348	48,317	38,981	48,124	37,600	49,357	40,354	50,375
Median Earnings for Female, Full-time, Year-round Workers (\$)	32,065	37,470	32,830	38,137	31,507	38,486	31,594	39,454	32,205	40,556

Source: American Community Survey, 2013-2017 Estimates, 2017. <https://factfinder.census.gov> . Note that median income differs from mean (or average) income. The median is the middle value in the data set, while mean is the actual average income of all income levels reported. Using the median value as the reference, then, half of the workers make less than the median. MIT Lincoln County Living Wage Calculator = \$24,627/year. Minimum Wage = \$22,360/year.

Table 12: Comparative per Capita Income and Median Earnings, Oregon, Lincoln and Selected Counties, 2017

	2017						
	Oregon	Lincoln	Benton	Linn	Clatsop	Tillamook	Lane
Per Capita Income (\$)	30,410	25,782	30,873	24,448	28,115	25,458	27,032

Median Earnings for Workers (\$)	30,442	24,603	22,644	30,051	27,020	28,815	24,848
Median Earnings for Male, Full-time, Year-round Workers (\$)	50,375	40,354	58,537	46,951	45,099	43,453	44,473
Median Earnings for Female, Full-time, Year-round Workers (\$)	40,556	32,205	42,434	36,344	35,553	35,560	36,561

Source: American Community Survey, 2013-2017 Estimates, 2017. <https://factfinder.census.gov> . Note that median income differs from mean (or average) income. The median is the middle value in the data set, while mean is the actual average income of all income levels reported. Using the median value as the reference, then, half of the workers make less than the median. MIT Lincoln County Living Wage Calculator = \$24,627/year. Minimum Wage = \$22,360/year.

Table 13: Lincoln County 2017 Percentage Income Distribution by Income Range, Total and by Gender (Past 12 Months for Full-time Year-round Workers)

	Total (%) Earners at Each Level	Male - Percent Earners at Each Level	Female – Percent Earners at Each Level
Population 16 Years and Older with Earnings	21,462	10,914	10,548
Full-time, Year-round Workers with Earnings	11,257	6,418	4,839
\$1 to \$9,999 or less	3.0%	3.1%	2.8%
\$10,000 to \$14,999	6.2%	5.1%	7.7%
\$15,000 to \$24,999	17.5%	16.5%	18.8%
\$25,000 to \$34,999	21.6%	18.5%	25.6%
\$35,000 to \$49,999	21.2%	19.5%	23.4%
\$50,000 to \$64,999	13.7%	14.7%	12.4%
\$65,000 to \$74,999	5.0%	6.0%	3.7%
\$75,000 to \$99,999	5.9%	8.1%	3.0%
\$100,000 or more	5.9%	8.4%	2.4%

Source: American Community Survey, 2013-2017 Estimates, 2017. <https://factfinder.census.gov>

Table 14: Lincoln County Median Income in the Past 12 Months by Self-reported Race and Hispanic or Latino Identification, 2017

	% Population	Median Income (\$)
Households	20,674	43,291
One Race		
White	91.9%	43,346
Black or African-American	0.3	17,917
American Indian and Alaska Native	2.5	34,792
Asian	0.8	52,083
Native Hawaiian and Other Pacific Islander	0.1	39,306
Some Other Race*	1.2	52,560
Two or More Races	3.2	34,405
Hispanic or Latino Origin (of any race)	4.7	36,153
White alone, not Hispanic or Latino	89.0	43,735

Source: American Community Survey, 2017 estimates. <https://factfinder.census.gov> ,

Note that median income differs from mean (or average) income. The median is the middle value in the data set, while mean is the actual average income of all income levels reported. Using the median value as the reference, then, half of the workers make less than the median. "Some Other Race" category includes all other responses not included in the "White," "Black or African American," "American Indian or Alaska Native," "Asian," and "Native Hawaiian or Other Pacific Islander" race categories described above. Respondents reporting entries such as multiracial, mixed, interracial, or a Hispanic, Latino, or Spanish group (for example, Mexican, Puerto Rican, Cuban, or Spanish) in response to the race question are included in this category.

Table 15: Lincoln County Median Earnings by Education Level and Gender, 25 Years and Older, 2017

	Overall	Male	Female
Population 25 years and Over: Median Annual Earnings (full-time and part-time)	\$ 26,722	\$ 31,218	\$ 22,735
Less than High School Graduate	\$ 22,336	\$ 26,892	\$ 16,071
High School Graduate (Includes Equivalency)	\$ 23,223	\$ 25,346	\$ 21,078

Some College or Associate's Degree	\$ 26,607	\$ 32,064	\$ 21,875
Bachelor's Degree	\$ 32,679	\$ 36,796	\$ 30,359
Graduate or Professional Degree	\$ 42,500	\$ 60,267	\$ 38,513

Source: 2013-2017 American Community Survey (ACS) 5-year Estimates, US Census Bureau. <https://factfinder.census.gov> . Note that median earnings differ from an average rate: the median represents the middle value in the data set. In other words, half of the workers in the category make less than the median income level.

**Table 16: Lincoln County Educational Attainment Levels and Poverty Rates, 25 Years and Older,
Total and by Gender, 2017 Estimates**

	Total (Est.)	%age of Total with Income at or Below Poverty Rate	Male (Est.)	%age of Total with Income at or Below Poverty Rate	Female (Est.)	%age of Total with Income at or Below Poverty Rate
Lincoln County, Oregon						
Population 25 years and over	36,212	14.9%	17,061		19,151	
Less than High School Graduate	10.5%	29.0%	11.6%	25.1%	9.7%	33.3%
High School Graduate (includes equivalency)	28.7%	17.9%	28.6%	17.7%	28.7%	18.1%
Some College or Associate's Degree	28.1%	12.9%	35.9%	12.4%	37.4%	13.3%
Bachelor's degree or Higher	24.1%	6.7%	23.9%	4.9%	24.3%	8.2%

Source: 2013-2017 American Community Survey (ACS) 5-year Estimates, 2017 Estimates, US Census Bureau. <https://factfinder.census.gov> . Data on Poverty Rates Associated with Educational Attainment are maintained only for population 25 years of age and older.

Table 16a: 2017 Federal Poverty Guidelines

Household Size	2017 Federal Poverty Income Level	Income Levels Representing Half of 2017 Federal Poverty Levels	Income Levels Representing 125% of 2017 Federal Poverty Levels
One	\$12,060	6030	15,075
Two	16,240	8120	20,300
Three	20,420	10,210	25,525
Four	24,600	12,300	30,750

Source: Oregon Center for Public Policy: <https://www.ocpp.org/poverty/2017-poverty-guidelines/>

Table 17: Oregon and Lincoln County by Self-reported Race and Hispanic or Latino Identification - Distribution at 50%, 100%, and 125% Poverty Levels, 2017

	Total (population for whom poverty status is determined)		% with Income Below Poverty Level		% with Income of Less Than Half Poverty Level		% with Income Less than 125% Poverty Level	
	Oregon	Lincoln County	Oregon	Lincoln County	Oregon	Lincoln County	Oregon	Lincoln County
	3,947,954	46,705	14.9%	14.9%	6.5%	6.7%	19.7%	25%
Race and Hispanic or Latino Origin								
One Race	3,770,627	44,649	14.6%	18.2%	6.4%	6.5%	19.4%	24.6%
White	3,358,550	41,205	13.8%	17.8%	5.9%	6.6%	18.3%	23.7%
Black or African American	72,590	191	30.5%	41.9%	16.0%	19.4%	38.4%	54.5%
American Indian and Alaskan Native	43,674	1,459	26.3%	22.0%	12.8%	6.5%	32.1%	30.3%
Asian	162,923	577	15.6%	28.1%	8.9%	1.2%	19.1%	28.8%

Native Hawaiian and Other Pacific Islander	14,678	97	26.4 %	53.6%	10.6%	0.0%	32.9 %	62.9%
Some Other Race	118,212	1,120	22.2 %	15.4%	8.5%	4.3%	31.8 %	36.5%
Two or More Races	177,327	2,056	20.1 %	22.8%	9.1%	9.8%	26.0 %	34.7%
Hispanic or Latino Origin (of any race)	498,708	4,068	24.0 %	26.1%	8.6%	8.1%	33.0 %	42.6%
White alone, not Hispanic or Latino	3,027,964	38,825	5.6%	16.9%	12.6%	16.9 %	16.7 %	22.7%

Source: American Community Survey, 2013-2017 Estimates, 2017. <https://factfinder.census.gov> . Series S1703: Selected Characteristics of People at Specified Levels of Poverty in the Past 12 Months.

Table 18: Highest Industry Employment Sectors and Median Annual Wage, Lincoln County, 2017

	Total Annual Employment (Full-time and Part-time)	Full-time, Year-round Employment	%ag Emp that is Year
Total for All Sectors	18,891	11,111	5
Top Sectors in Employment (*):			
Arts, Entertainment and Recreation, and Accommodation and Food Services	3,822	2,012	52.6%
Accommodation and Food Services*	3,137	1,588	
Arts, Entertainment, and Recreation	685	424	
Retail Trade*	2,736	1,565	57.2%
Educational Services, and Health Care and Social Assistance	3,193	1,789	56.0%
Educational Services	1,014	494	
Health Care and Social Assistance*	2,179	1,295	
Manufacturing (including Food)*	1,140	841	73.8%
Construction*	1,095	619	56.5%
Other Services (incl. Law Enforcement but not Public Administration)	874	479	54.8%
Professional, Scientific, and Management, and Administrative and Waste Management Services	1,789	797	44.6%
Professional, Scientific, and Technical Services	880	427	

Administrative and Support and Waste Management Services	909	370	
Finance and Insurance, and Real Estate and Rental Leasing	765	540	70.6%
Finance and Insurance	288	234	
Real Estate, Rental and Leasing	477	306	

Source: American Community Survey, 2017 Estimates, US Census Bureau. <https://factfinder.census.gov> .

Percentages and employment numbers do not total 100% or total employment due to selection of top employment sectors (not all sectors are reported here).

Table 19: Comparative Median Annual Wage Levels in Top Employment Sectors in Lincoln County, State of Oregon and Surrounding Counties (Full-time Year-round Employed 16 Years of Age and Older), 2017

(* Signifies Top 5 Employment Sector)	State of Oregon	Lincoln County	Lane County	Linn County	Tillamook County
Total for All Sectors	\$46,925	\$36,034	\$40,869	\$41,590	\$39,034
Top Sectors in Employment (Lincoln County):					
Accommodations and Food Services*	\$28,093	\$22,537	\$22,251	\$21,709	\$22,021
Retail Trade*	35,745	28,860	30,757	31,114	30,281
Health Care and Social Assistance*	44,951	39,148	37,399	36,264	37,001
Manufacturing (including Food)*	51,868	52,279	42,269	48,880	42,571
Arts, Entertainment, and Recreation	37,344	31,818	37,005	30,982	36,801
Administrative and Waste Services	35,355	27,115	32,022	30,936	22,541
Construction*	50,544	44,464	47,115	47,948	49,141
Other Services (including law enforcement but not Public Administration)	39,082	31,913	32,261	37,163	34,461
Professional, Scientific, and Technical Services	70,378	44,330	53,453	56,131	62,701
Real Estate, Rental and Leasing	43,814	36,154	41,305	35,734	30,901

Source: American Community Survey, 2013 – 2017 Annual Estimates, 2017. <https://factfinder.census.gov>

Table 20: Employment and Median Annual Wage Levels in Top Employment Sectors in Lincoln County by Gender, 2017

	State of Oregon	Lincoln County	% Male	% Female	Male Median Annual Wage	Female Median Annual Wage	Female Earnings as Percentage of Male Earnings
Total for All Sectors, Full-time, Year-round	\$46,925	\$36,034	56.9%	43.1%	\$40,733	\$32,322	79.4%
Top Sectors in Employment (Lincoln County):							
Accommodation and Food Services	28,093	22,537	56.9%	43.1%	22,132	23,590	106.6%
Retail Trade	35,745	28,860	51.1%	48.9%	29,844	26,936	90.3%
Health Care and Social Assistance	44,951	39,148	28.0%	72.0%	49,070	36,290	74.0%
Manufacturing (including Food)	51,868	52,279	77.5%	22.5%	65,929	32,370	49.1%
Arts, Entertainment, and Recreation	37,344	31,818	58.0%	42.0%	38,333	27,677	72.2%
Administrative and Waste Services	35,355	27,115	52.4%	47.6%	27,283	26,711	97.9%
Construction	50,544	44,464	93.7%	6.3%	47,606	28,977	60.9%
Other Services (including Law Enforcement but not Public Administration)	39,082	31,913	58.0%	42.0%	35,855	25,313	70.6%
Professional, Scientific, and Technical Services	70,378	44,330	37.7%	62.3%	70,481	42,589	60.4%
Real Estate, Rental and Leasing	43,814	36,154	52.3%	47.7%	21,250	42,292	199.0%

Source: American Community Survey, 2013 – 2017 Annual Estimates, 2017. <https://factfinder.census.gov>

Table 21: Occupation, Civilian Employed Population (16 years and over), OR, Lincoln, and Selected Counties, 2017

	Oregon	Lincoln	Benton	Linn	Clatsop	Tillamook	Lane
--	--------	---------	--------	------	---------	-----------	------

Occupation							
Civilian Employed Population 16 Years and Older	1,885,983	18,891	41,703	51,079	17,121	10,070	167,083
Management, Business, Science, and Arts Occupations	38.1%	27.4%	50.2%	29.6%	30.0%	27.0%	35.3%
Service Occupations	18.2%	27.7%	17.8%	19.0%	22.9%	20.1%	19.9%
Sales and Office Occupations	22.9%	24.2%	18.3%	22.1%	26.0%	19.7%	24.6%
Natural Resources, Construction, and Maintenance Occupations	8.9%	9.2%	6.5%	11.7%	10.2%	15.9%	8.0%
Production, Transportation, and Material Moving Occupations	11.8%	11.5%	7.1%	17.6%	11.0%	17.3%	12.1%

Source: American Community Survey, 2013-2017 Estimates, 2017. <https://factfinder.census.gov>

Table 22: Lincoln County Industry Sector Employment – Distribution by Occupational Category (Full-time and Part-time), 2017

		Sector Employment Distribution by Occupational Category			
Industry sector	Total Employed	Management, Business, Science, and Arts Occupations	Service Occupations	Sales and Office Occupations	Residential Construction, Maintenance, and Material Moving Occupations
Civilian Employed 16 years and Older	18,891	27.4%	27.7%	24.2%	
Agriculture, Forestry, Fishing and Hunting, and Mining	820	16.1%	0.7%	9.1%	

Construction	1,905	18.8%	0.0%	5.1%	
Manufacturing	1,140	28.8%	2.2%	4.6%	
Wholesale Trade	348	11.2%	10.1%	31.9%	
Retail Trade	2,736	3.3%	4.5%	77.7%	
Transportation and Warehousing, Utilities	919	16.6%	6.2%	24.5%	
Information	309	45.3%	0.0%	35.3%	
Finance and Insurance, and Real Estate and Rental and Leasing	765	38.2%	15.6%	43.5%	
Professional, Scientific, and Management, and Administrative and Waste Management Services	1,789	42.1%	39.2%	14.4%	
Educational Services, and Health Care and Social Assistance	3,193	59.9%	27.2%	11.4%	
Arts, Entertainment, and Recreation, and Accommodation and Food Services	3,822	12.9%	66.6%	14.4%	
Other Services, except Public Administration	874	20.6%	38.8%	17.8%	
Public Administration	1,081	41.8%	37.8%	14.2%	

Source: American Community Survey, 2013-2017 Estimates, 2017. <https://factfinder.census.gov>

Table 23: Occupation Categories by Gender for Full-time Year-round Civilians, 16 Years and Older, Lincoln County 2017 Estimates

	Total	% Male	% Female
Full-time Year-round Civilian Employed Population 16 years and older	11,111	56.9%	43.1%
Occupations:			
Management, Business, Science, and Arts Occupations:	3,375	53.3%	46.7%
Management, Business, and Financial Occupations			
Management Occupations	1,288	60.3%	39.7%
Business and Financial Operations Occupations	344	48.5%	51.5%
Computer, Engineering, and Science Occupations			
Computer and Mathematical Occupations	151	50.3%	49.7%
Architecture and Engineering Occupations	176	95.5%	4.5%
Life, Physical, and Social Science Occupations	196	64.8%	35.2%
Education, Legal, Community Service, Arts, and Media Occupations			
Community and Social Service Occupations	217	44.7%	55.3%
Legal Occupations	85	41.2%	58.8%
Education, Training, and Library Occupations	310	18.4%	81.6%
Arts, Design, Entertainment, Sports, and Media Occupations	113	48.7%	51.3%
Healthcare Practitioner and Technical Occupations			

Health Diagnosing and Treating Practitioners and Other Technical Occupations	300	43.7%	56.3%
Health Technologists and Technicians	195	55.9%	44.1%
Service Occupations	2,510	56.1%	43.9%
Healthcare Support Occupations	238	6.7%	93.3%
Protective Service Occupations			
Fire Fighting and Prevention, and Other Protective Service Workers including Supervisors	105	100.0%	0.0%
Law Enforcement Workers including Supervisors	146	67.8%	32.2%
Food Preparation and Serving-related Occupations	944	67.1%	32.9%
	Total	% Male	% Female
Building and Grounds Cleaning and Maintenance Occupations	633	73.9%	26.1%
Personal Care and Service Occupations	444	19.4%	80.6%
Sales and Office Occupations	2,766	35.9%	64.1%
Sales and Related Occupations	1,304	49.0%	51.0%
Office and Administrative Support Occupations	1,462	24.3%	75.7%
Natural Resources, Construction, and Maintenance Occupations	1,034	95.6%	4.4%
Farming, Fishing, and Forestry Occupations	292	84.6%	15.4%
Construction and Extraction Occupations	405	100.0%	0.0%
Installation, Maintenance, and Repair Occupations	337	100.0%	0.0%
Production, Transportation, and Material Moving Occupations	1,426	79.2%	20.8%
Production Occupations	770	72.2%	27.8%
Transportation Occupations	350	97.1%	2.9%
Material Moving Occupations	306	76.5%	23.5%

Source: American Community Survey, 2013-2017 Estimates, 2017. <https://factfinder.census.gov>

Table 24: Regional Industry Employment Forecast, 2017-2027 (Benton, Clatsop, Columbia, Lincoln and Tillamook Counties)

	2017	2027 Forecast	Change in Number of Openings 2017- 2027	% Change 2017-2027
Total Employment	108,980	116,970	7,990	7%
Total payroll employment	103,230	110,620	7,390	7%
Total private	77,600	83,980	6,380	8%
Natural resources and mining	3,600	3,780	180	5%
Mining and logging	990	980	-10	-1%
Construction	3,810	4,300	490	13%
Manufacturing	8,650	9,040	390	5%
Durable goods	4,700	4,820	120	3%
Wood product manufacturing	1,160	1,110	-50	-4%
Nondurable goods	3,950	4,230	280	7%
Food manufacturing	1,810	2,050	240	13%
Paper manufacturing	1,270	1,140	-130	-10%
Trade, transportation, and utilities	14,920	15,540	620	4%
Wholesale trade	990	1,000	10	1%
Retail trade	12,000	12,440	440	4%
Transportation, warehousing, and utilities	1,930	2,100	170	9%
Information	980	1,000	20	2%
Financial activities	3,870	4,060	190	5%
Professional and business services	7,840	9,020	1,180	15%
Professional and technical services	3,220	3,640	420	13%
Private educational and health services	13,730	15,190	1,460	11%
Hospitals	4,490	4,900	410	9%
	2017	2027 Forecast	Change in Number of Openings 2017- 2027	% Change 2017-2027
Leisure and hospitality	16,090	17,770	1,680	10%
Accommodation and food services	15,040	16,630	1,590	11%
Accommodation	3,970	4,330	360	9%
Food services and drinking places	11,070	12,300	1,230	11%

Other services and private households	4,110	4,280	170	4%
Government	25,630	26,640	1,010	4%
Federal government	1,200	1,190	-10	-1%
State government	1,300	1,390	90	7%
Local government	23,130	24,060	930	4%
Local education	16,940	17,580	640	4%
Self-employment	5,750	6,350	600	10%

Source: <https://qualityinfo.org> . Erik Knoder, Regional Economist. Published June 2018.