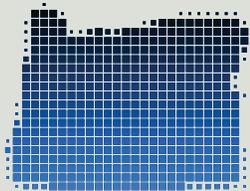


EXECUTIVE SUMMARY
TRACKING OREGON'S PROGRESS



A REPORT OF THE
TRACKING OREGON'S PROGRESS
(TOP) INDICATORS PROJECT



THE OREGON
COMMUNITY
FOUNDATION



Many hands helped with this report. We are indebted first of all to the advisory committee for their counsel on needed indicators; we added several new indicators in response to their suggestions. We are also grateful to those who reviewed early drafts of this report under very short timelines, and whose corrections and insights greatly improved the final report. Rita Conrad of the Oregon Department of Education Office of Child Care and Duncan Wyse of the Oregon Business Council – both former directors of the Oregon Progress Board – provided particularly insightful comments about the framing of the report and ways to avoid misinterpretation of the indicators. Sheila Martin of the Institute of Portland Metropolitan Studies and Jason Jurjevich of the Population Research Center, both at Portland State University, provided very careful reviews of the early draft and helped us to clarify ambiguities and correct errors in the report. Rita and Sheila, as project manager and steering committee member, respectively, of the Greater Portland Pulse project report, also drew on insights from the GPP project to help shape the TOP Indicators report. Beth Emshoff of Oregon State University, Mike Hibbard of the University of Oregon and Ethan Seltzer of Portland State University all pushed us hard to add new contextual material and sharpen the focus for potential readers. John Antle, Bill Jaeger and JunJie Wu of Oregon State University provided helpful suggestions about the section on the environment. We were not always able to follow the suggestions of reviewers, because we sometimes faced conflicting recommendations. We are grateful for the comments and counsel of all these reviewers and look forward to their continued involvement as the TOP Indicators effort evolves.

**TRACKING OREGON'S PROGRESS:
A REPORT OF THE TRACKING OREGON'S PROGRESS
(TOP) INDICATORS PROJECT**

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TOP INDICATORS

EXECUTIVE SUMMARY

This past spring, the Oregon Community Foundation began a partnership with Oregon State University's Rural Studies Program on the Tracking Oregon's Progress (or TOP) Indicators Project. This project builds upon the discontinued Oregon Progress Board Benchmarks data collection and reporting, and upon the ongoing Greater Portland Pulse indicators effort in the Portland metropolitan area. The project involves two related components: (1) a TOP Indicators website (http://oe.oregonexplorer.info/rural/CommunitiesReporter/top_indicators.aspx) that tracks changes in 88 indicators (TOP Indicators) for the state of Oregon since 1990 when data are available; and (2) this 2014 TOP Indicators Report.

This 2014 report is a report to the people of Oregon. It identifies trends in the state that suggest both progress toward prosperity as well as issues that may be a source of future barriers and concerns. Like those who led previous indicator efforts, we hope that the report and website will be used by policymakers, government analysts, the press, business and civic leaders and engaged citizens to better understand the current social, economic and environmental condition of the state.

REPORT HIGHLIGHTS

Over the past quarter century, Oregon has seen some significant changes in its economy, people, communities, environment and natural resource use. Between 1990 and 2010:

- Oregon's economy has grown. Population and jobs have grown faster in Oregon than nationally.
- Oregonians have become better educated. High school graduation rates have increased for all groups and more Oregonians have college degrees.
- Oregonians have become healthier. Mortality rates have decreased, most markedly for the youngest (0-4) and oldest (above 65) Oregonians. In addition, teen pregnancy rates have declined significantly and the smoking rate among Oregon adults has declined.
- Arrest rates have decreased substantially.
- Oregonians reduced solid waste.

This progress, however, has not been not shared equally by all Oregonians, and some economic, social and environmental indicators reveal issues of continuing concern.

- Inequality has increased and some are worse off: per capita income declined relative to the nation, average wages per job stagnated, and unemployment, poverty and inequality increased substantially.
- Per capita income of minorities has fallen relative to that of the White population. Unemployment has risen overall, with African-Americans, American Indians/Native Alaskans, Native Hawaiians and Pacific Islanders and Multiracial Oregonians experiencing the highest unemployment rates. Further, the poverty rate has increased, especially for children, with one fifth of Oregon's children living in poverty.
- Some population groups (African-Americans, American Indians/Native Alaskans and Hispanics) have lagged behind in educational attainment as they graduate from high school at lower rates. While graduation rates have increased for all groups, large discrepancies exist. With the projected increase in share of non-White students in coming years, this disparity in educational attainment will have implications for the strength of Oregon's economy and the vibrancy of our communities.
- Incarceration rates differ by race and ethnicity. African-Americans in Oregon have been incarcerated at a rate that is more than 5 times higher than their share of the population.
- Air quality has been unhealthy for some sensitive groups multiple days per year in some communities.

And there have been important changes in land management and land use in Oregon.

- Timber harvests have declined in Oregon.
- A small share of Oregon's farmland, forestland and rangeland has been slowly converted to urban and residential uses.

KEY FINDINGS

ECONOMY

Oregon has grown, but inequality has increased and some are worse off.

Population and Jobs

Over many decades, the population and number of jobs in Oregon have grown faster than the national average, so Oregon's share of the nation's population and jobs has increased slightly. Since 1990, the population has become more racially and ethnically diverse, with Hispanics almost tripling as a share of the state's population. Labor force participation has increased for some racial and ethnic populations and declined for others since 2000: during the recession, labor force participation declined for Whites, Native Americans/ Native Alaskans and Pacific Islanders, and increased for those who identified as Hispanic, Other, and Asian.

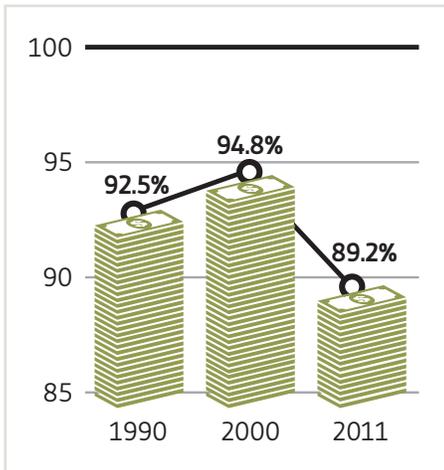


Figure 1: Oregon Per Capita Personal Income as a Percent of the U.S. Average, 1990-2011. Source: US Bureau of Economic Analysis

Labor Market Conditions and Income

Labor market conditions have deteriorated in Oregon in the past two decades. Per capita income has dropped in Oregon relative to the nation since 2000, as illustrated in Figure 1.

The unemployment rate has risen since 2000, especially for Oregonians of color, as illustrated in Figure 2. Income inequality has increased, with an increasing share of Oregon's income going to higher income households. Furthermore, the average income of minorities has declined relative to incomes for Whites. See Figure 3.

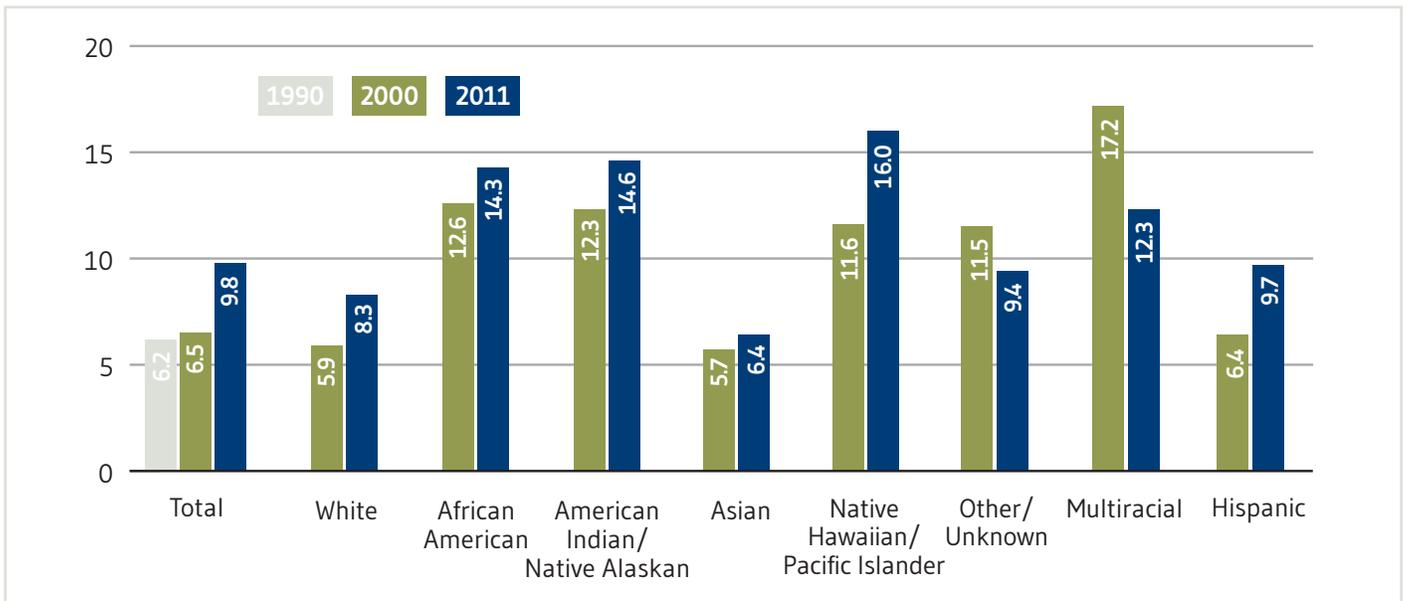


Figure 2: Oregon Unemployment Rates by Race/Ethnicity (Percent), 1990-2011. Source: US Bureau of the Census, Decennial Census & American Community Survey

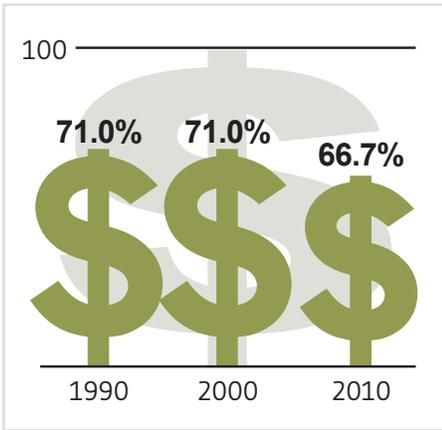


Figure 3: Oregon Minority Per Capita Income as a Percent of White Per Capita Income, 1990-2010. Source: US Bureau of the Census, Decennial Census & American Community Survey

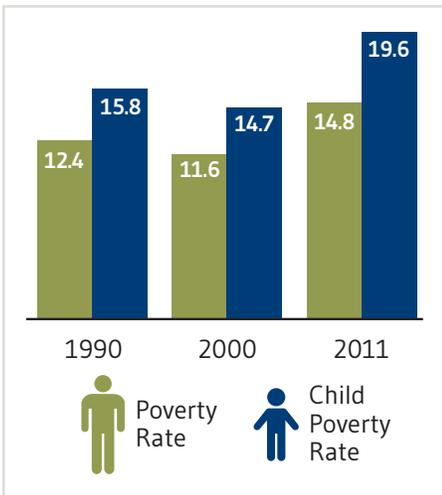


Figure 4: Poverty and Child Poverty Rates in Oregon (Percent), 1990-2011. Source: US Bureau of the Census, Decennial Census & American Community Survey

Poverty

Poverty rates have risen substantially, especially for children. See Figure 4. In addition, the housing cost burden in Oregon has increased substantially since 1990.

PEOPLE

Oregonians have become better educated and healthier, but some have lagged behind.

Education

Oregonians have become better educated overall, but some groups faced obstacles to achieving higher levels of educational attainment. High school graduation rates have increased for all racial/ethnic groups and for the economically disadvantaged; however, large disparities among groups remained. As illustrated in Figure 5, overall high school graduation rates increased in Oregon between 2010 and 2012 from 69.1 percent to 72.4 percent. There were, however, large differences in high school graduation rates across racial and ethnic groups. For example, four out of five Asian students in the class of 2010 graduated from high school in five years, compared to less than two-

thirds of African-American, American Indian/Native Alaskan, and Hispanic students. While there is evidence of increasing graduation rates for most groups, the gap between the highest and lowest rates did not decrease. The gap in 2010 was 25.3 percent; and in 2012, it was 26.8 percent.

Adult educational attainment has been improving since 1990: the percent of adults with high school education or less has fallen, the percent with two-year degrees or higher has increased from 28 percent to 37 percent, and the percent with four-year degrees has increased from 21 percent in 1990 to 29 percent in the most recent period.

Health

Oregon adults and teens have made some good health-related choices and Oregonians have been living longer, but disparities in health outcomes have continued.

Pregnant mothers have sharply reduced their use of alcohol and tobacco during pregnancy. See Figure 6. However, many (25 percent in 2011) have still not been getting prenatal care during the early months of pregnancy.

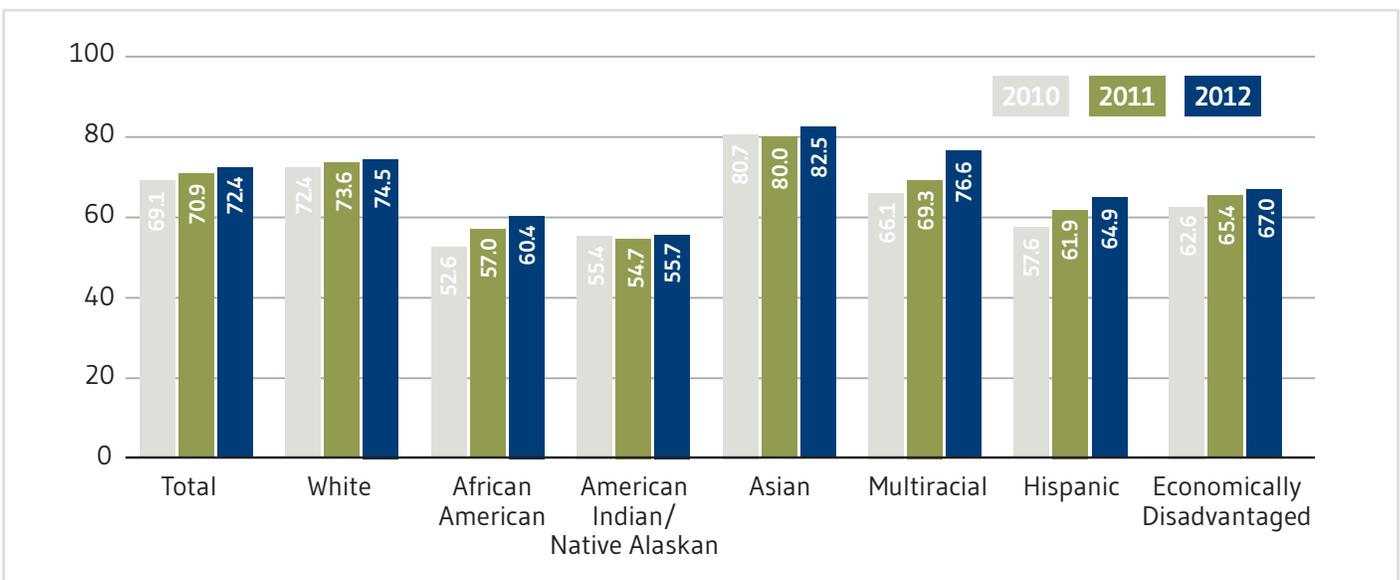


Figure 5: Oregon High School Graduation Rates (Percent, 5-year cohort), 2010-2012. Source: Oregon Department of Education

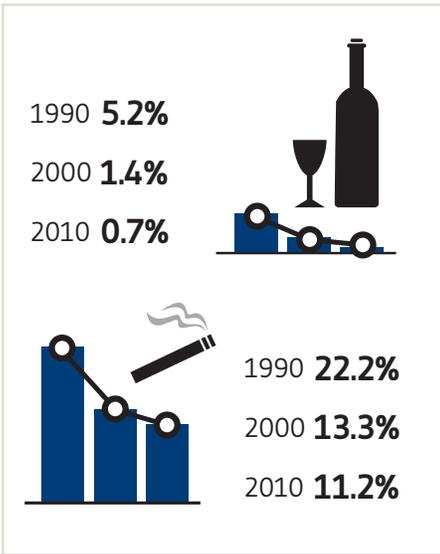


Figure 6: Prenatal Alcohol and Tobacco Use in Oregon, 1990-2010. Source: Oregon Department of Human Services, Center for Health Statistics

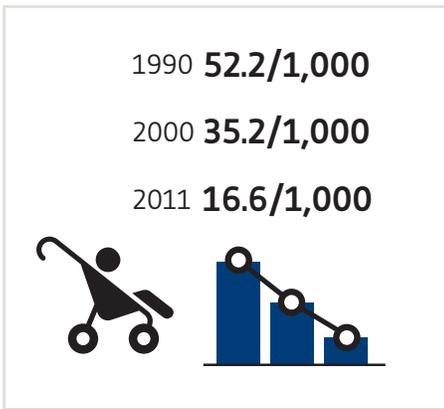


Figure 7: Oregon Teen Pregnancy Rates (of 15-17 Year-Old Girls), 1990-2011. Source: Oregon Department of Human Services, Center for Health Statistics

During the 2000s, about one in 16 Oregon babies was born with less than the recommended birth weight, a rate that varied greatly across racial and ethnic groups. All non-White racial groups have had rates above the state average, and African-American rates, while declining over time, have remained the highest (approximately 10 percent of African-American babies were born with low birth weight in 2011, compared to 6.1 percent of all Oregon babies).

The teen pregnancy rate has declined substantially during the past two decades, but there were great disparities in rates among racial and ethnic groups. The pregnancy rate among all 15-17 year-olds declined markedly, as illustrated in Figure 7. However, the teen pregnancy rates for African-Americans, Hispanics, and American Indians/Native Alaskans were more than 5 times higher than for Asian/Pacific Islanders and 3 times higher than for Whites.

Use of alcohol and cigarettes by 8th graders in Oregon fluctuated in the 2000s (in 2009, 23 percent reported using alcohol in the past 30 days and 10 percent reported using cigarettes), and 8th graders' use of illegal drugs in the past 30 days increased by

about 50 percent (from 13 percent to 18 percent between 2000 and 2009).

While smoking by Oregon adults declined in the 2000s (from 20 percent to 17 percent), only about half of Oregon adults met the U.S. Centers for Disease Control and Prevention (CDC) recommendations for physical activity and only about one quarter of Oregon adults ate the recommended five or more servings of vegetables each day. Rates for both exercise and diet showed little improvement over time.

The traffic fatality rate in Oregon has been cut almost in half in the last two decades. Highway safety has improved dramatically since 1996, when there were 526 fatalities (a rate of 16.2 traffic fatalities per 100,000 population). In 2011, there were only 331 fatalities (a rate of 8.7 traffic fatalities per 100,000 people).

Mortality rates have declined for all age groups since 1990. The most dramatic declines have been for those 65 and older and for the age 0-4 population. The mortality rate for 66-74 year-olds declined from 25 per 1,000 in 1990 to 18 per 1,000 in 2011, and the mortality rate for those 0-4 years of age declined from 2.2 per 1,000 population to 1.3 per 1,000.

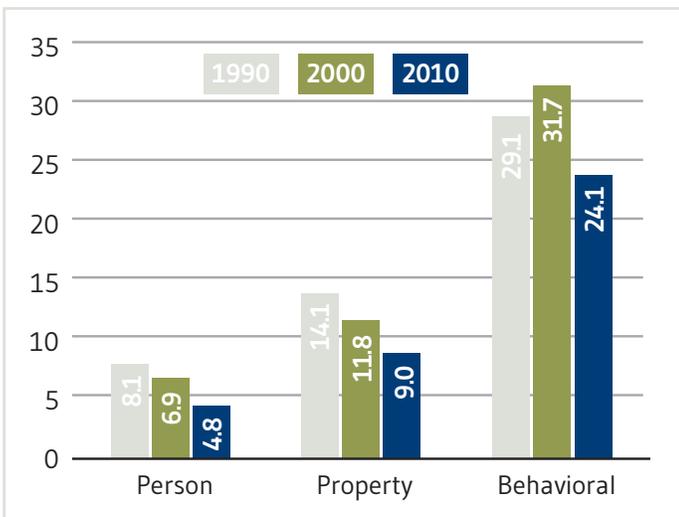


Figure 8: Total Arrest Rates in Oregon (Per Thousand), 1990-2010. Source: Oregon Criminal Justice Commission

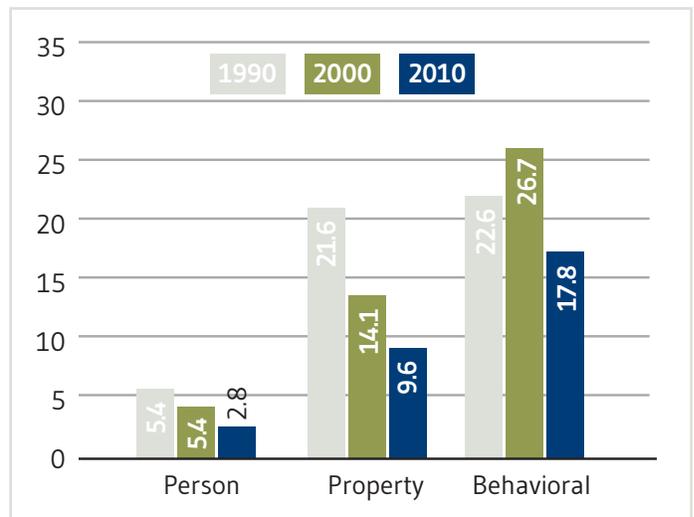


Figure 9: Juvenile Arrest Rates in Oregon (Per Thousand), 1990-2010. Source: Oregon Criminal Justice Commission

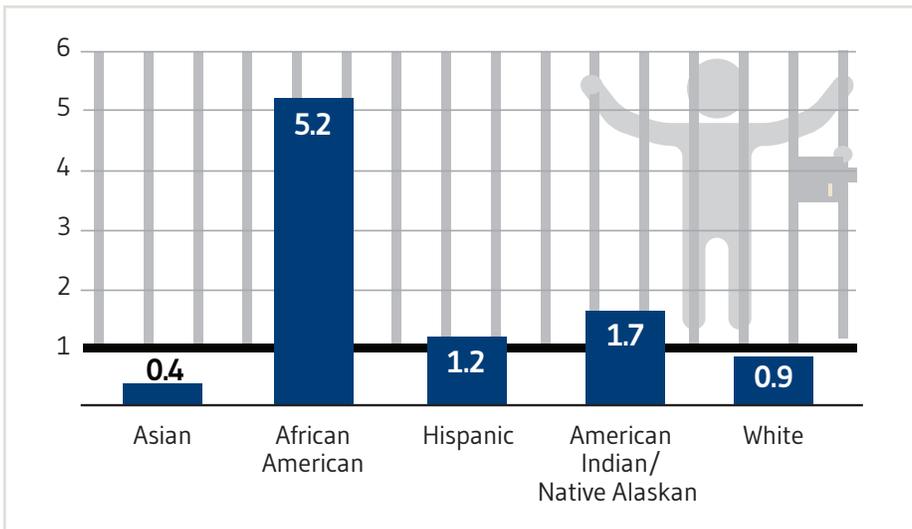


Figure 10: Index of Proportionality of Incarceration by Race/Ethnicity in Oregon, 2011. Source: Oregon Department of Corrections

COMMUNITIES

Oregon arrest rates have declined overall, but incarceration rates have been higher for some minorities.

Arrests and Incarceration

Arrest rates for crimes against persons and property and for all age groups declined more than 35 percent between 1990 and 2010, and arrests for behavioral crimes peaked in 2000 but have declined almost 25 percent since 2000. See Figures 8 and 9.

African-Americans in Oregon have been incarcerated at a rate that was five times more than their share of the population. Asians have been incarcerated at a rate that is lower than their share of the population. See Figure 10.

Child Abuse

The child abuse rate in Oregon has increased slightly since 2000: approximately 1.3 out of every 1,000 children under 18 years of age were reported as victims of child abuse or neglect.

ENVIRONMENT AND NATURAL RESOURCES

Resource use decisions in Oregon have led to greatly reduced timber harvests, slow loss of farmland and less solid waste.

Solid Waste

Oregonians have reduced the waste put into landfills on a per capita basis by about one quarter since 2000. See Figure 11.

Air Quality

Oregonians in some communities have been exposed multiple times per year to air that is unhealthy for sensitive groups.

Timber Harvest

The amount of timber harvested annually in Oregon has been cut almost in half in the past two decades, as Federal land management plans increased protections for old-growth forests. See Figure 12.

Land Use Conversion

Oregon has been slowly losing farmland, forestland and rangeland to urban and low-density residential uses.



Figure 11: Pounds of Waste Landfilled in Oregon, Per Capita, 1990-2011. Source: Oregon Department of Environmental Quality, Land Quality Division

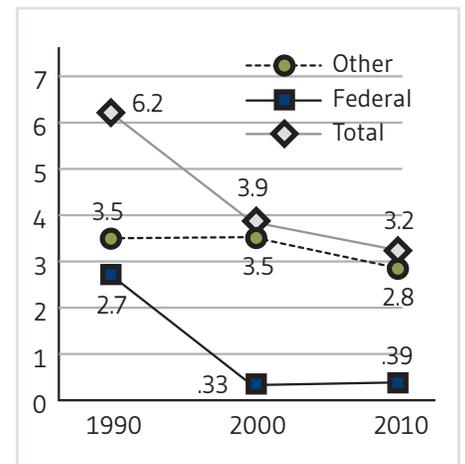


Figure 12: Oregon Timber Harvest, in Billions of Board Feet, 1990-2010. Source: Oregon Department of Forestry

MOVING FORWARD

This report attempts to build on the legacy of the Oregon Progress Board in tracking Oregon's progress toward a more sustainable and equitable economy and society. Moving forward requires more than merely understanding these trends and continuing to monitor them. It requires thoughtful and concerted action to identify opportunities and reduce barriers for all Oregonians, and particularly those who have not shared proportionally in the fruits of past progress.



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