
CTUIR 2022-2027
Comprehensive
Economic
Development
Strategy



*For: Confederated Tribes of
the Umatilla Indian
Reservation*

From: Points Consulting

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Executive Summary & CEDS Background

The Confederated Tribes of the Umatilla Indian Reservation (CTUIR) Comprehensive Economic Development Committee, with the support of Points Consulting LLC, have developed the CTUIR Comprehensive Economic Development Strategy (CEDS) to guide economic development for the Tribes over the next 5 years. The Committee's priority goals for the Tribes in the coming years are those related to workforce, land use, community and tourism, and internal collaboration.



A CEDS is a planning tool developed by the U.S. Economic Development Administration (EDA) to assist regional economic development, promote economic resilience, encourage action from both private and public sections and allows Tribes to be eligible for EDA opportunity funds. Funding through the EDA can be used for planning, infrastructure projects, and forming programs that foster economic development.

This CEDS includes regional and organizational background information and demographic information about CTUIR, county and regional comparisons, a timeline of CTUIR development, community engagements, and an outlined direction for CTUIR and associated action plan.

VISION STATEMENT

The Department of Economic and Community Development promotes the interests of members of the Umatilla Indian Reservation by creating jobs, increasing revenues, and contributing to a diversified and developed economic base, thus creating opportunities for continued advancement of all sectors of the community.

This CEDS strategy includes the following sections:

- Summary Background
- Regional Highlights
- Strengths, Weaknesses, Opportunities & Threats (SWOT) Analysis
- Economic Resiliency
- Strategic Direction & Action Plan
- Evaluation Framework
- Appendices

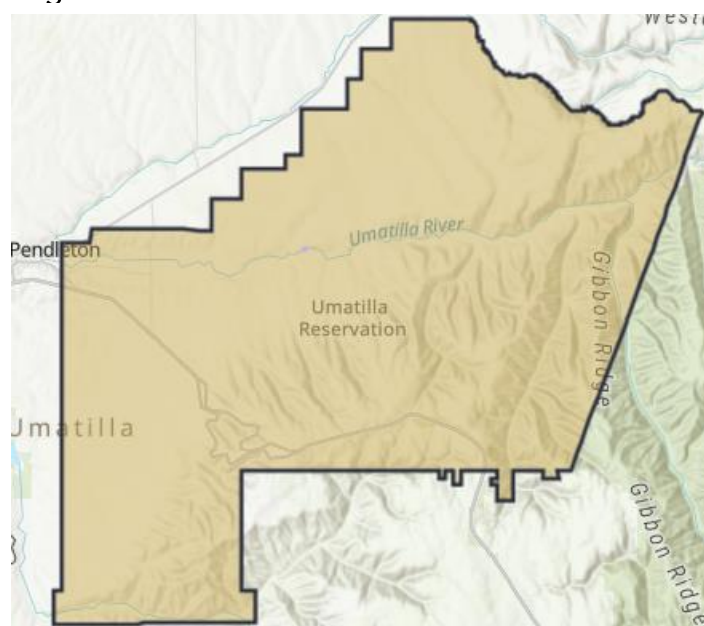
The CTUIR CEDS process was overseen by a Strategy Committee with representation from various aspects of Tribal government and the business community. Specific organizations and individuals included on the Committee are listed in [Appendix A](#) of this document.

Summary Background

Regional & Organizational Background

The headquarters of the CTUIR is located near Pendleton, OR, and the Reservation spans over 173,000 acres.¹ The CTUIR is a union of three tribes: Cayuse, Umatilla, and Walla Walla, and has over 3,100 Tribal members. In 1855, in what is known as The Treaty of June 9, 1855, the three Tribes Umatilla, Cayuse, and Walla Walla ceded 6.4 million acres to the United States. Later in 1949, the Tribes united into a single form of government, which is now known as the Confederated Tribes of the Umatilla Indian Reservation.² Around half of these members live on or near the CTUIR Reservation. Figure 1 shows the boundaries of the

Figure 1: CTUIR Reservation Area



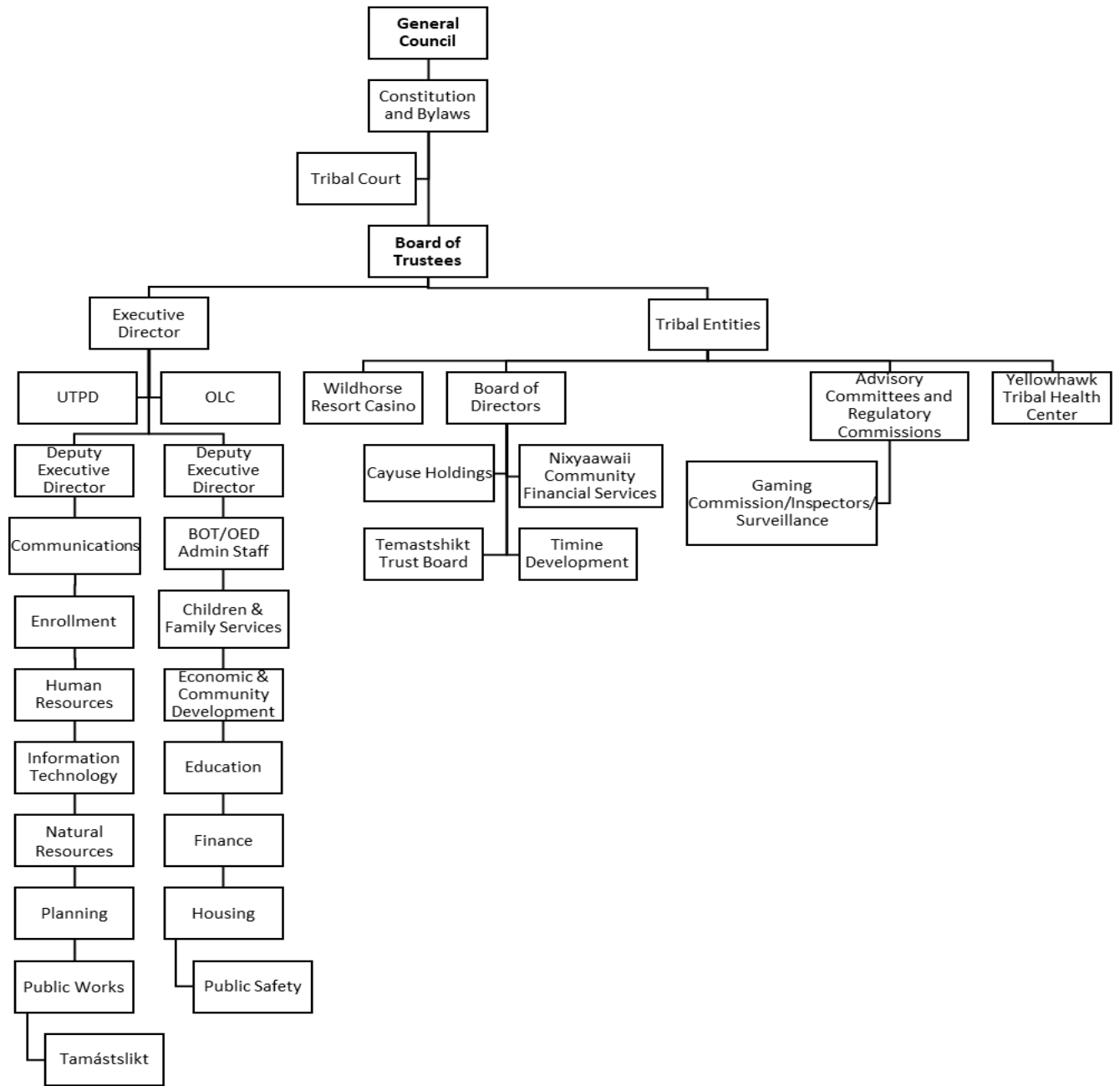
Reservation. The Reservation area lies entirely in the Census County Division (CCD) called the Umatilla Reservation CCD. The synchronization of the Census and Tribal borders is fortunate for anybody utilizing socioeconomic data, because typically Reservation boundaries do not correspond so naturally with political boundaries.

As shown in the following Figure 2, the structure of the CTUIR government may be segmented, but departmental and organizational leaderships are on the path to strengthen communication and collaboration. Moving forward into the next 5 years, by 2027, leadership throughout the governmental structure can obtain cohesive alliance for projects and planning, and transition away from siloed departments.

¹ <https://ctuir.org/about/>

² "The Confederated Tribes of the Umatilla Indian Reservation," Columbia River Inter-Tribal Fish Commission (CRITFC), November 5, 2021, <https://critfc.org/member-tribes-overview/the-confederated-tribes-of-the-umatilla-indian-reservation/>

Figure 2: Government Structure of the CTUIR



Department of Economic & Community Development

The Department of Economic and Community Development (DECD) plays a crucial role in promoting the interests of the members of the CTUIR Reservation by spearheading efforts to create jobs, increase revenues, and contribute to a diversified and developed economic base. Included in the DECD is the Tribal Environmental Recovery Facility (TERF) which is the exclusive provider of solid waste and recycling services for the reservation. Also falling under the DECD is the Tribal Farm Enterprise (TFE) which farms tribally owned land and leased land to provide multiple income streams to the reservation. TERF and the TFE are expanded upon in the [Key Industry Clusters](#) section.

The department's work is integral to the Reservation's continued growth and prosperity, and it has been successful in creating opportunities for advancement in all sectors of the community. Through its initiatives and programs, the department supports small businesses, entrepreneurs, and investors in order to facilitate economic growth and job creation in the region. The Economic & Community Development Department does not oversee Tribal Entities or the Wildhorse Casino but interacts and collaborates with these entities on special events and economic development activities. Although the DECD is tasked with updating and meeting the requirements for the CTUIR CEDS planning, the department ensures it will collect input from all other Departments, the Board of Trustees, tribal youth, Tribal membership, residents, and employees of the CTUIR.

Opportunity Zones

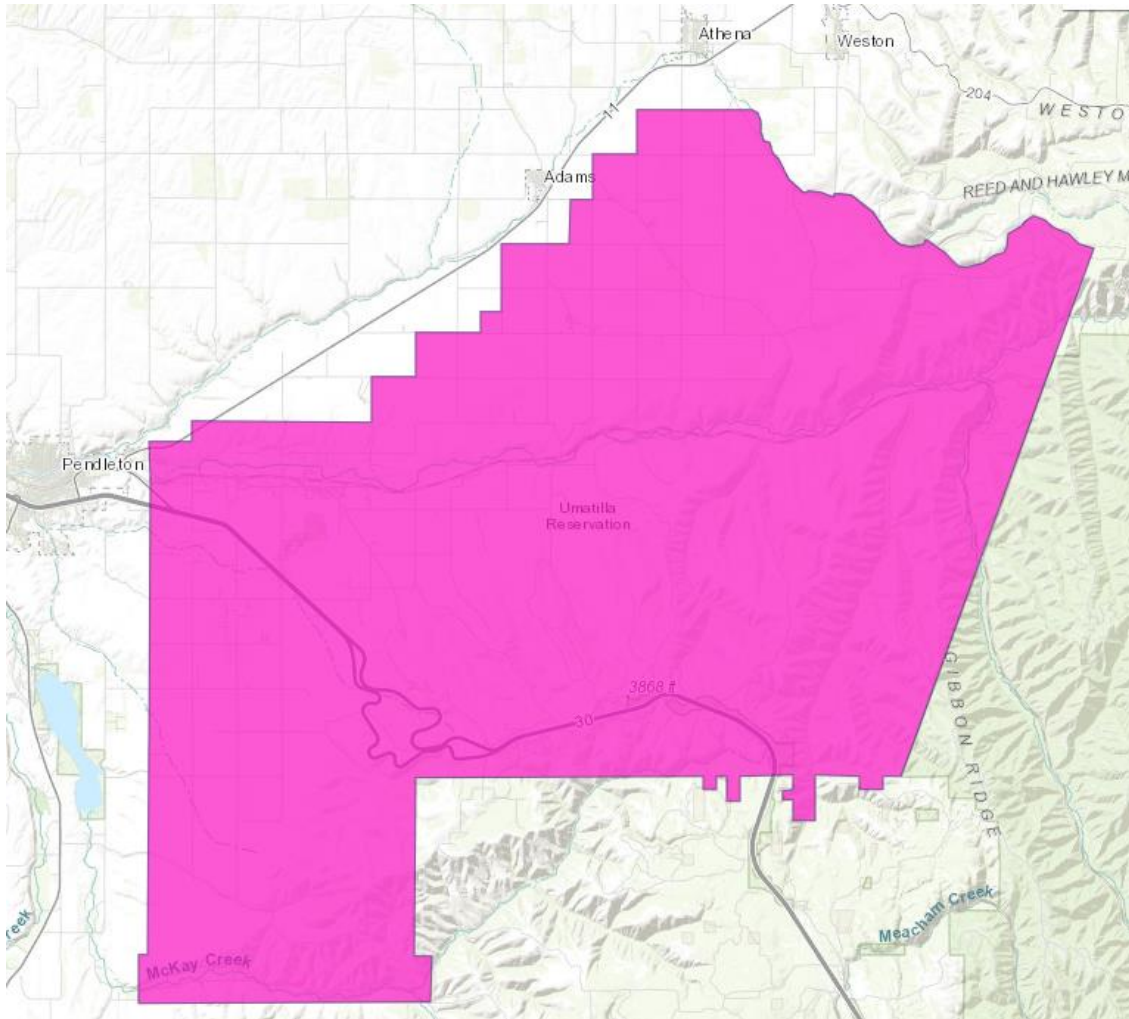
Opportunity Zones (OZs) were created via the Tax Cuts & Jobs Act of 2017 as a method for encouraging business and real estate investment in designated low-income areas across the United States. In particular, the program provides individuals who owe capital gains taxes the prospect of investing those funds in Qualified Opportunity Funds (QOFs), which provide investors with tax benefits. In short, QOFs allow investors to defer existing capital gains taxes by up to 10 years, reduce their tax burden on further capital gains appreciation, and help spur development within economically disadvantaged areas.

Opportunity Zones are significant for tribes as existing policies that are designed to attract investment to them have been largely unsuccessful, such as the Native American Housing Assistance and Self-Determination Act of 1996 (NAHASDA). The Urban Institute conducted a study of housing needs in tribal areas in 2017 and determined frequently reported barriers to investment. Which included lack of interest from other organizations, lack of availability of programs, political tensions, administrative constraints, and differing priorities.³ However, OZs will differ from previous programs based on the combination of tax incentives, eligibility period, and flexibility. In total, 30% of eligible census tracts on tribal lands were picked to be designated as OZs. Tribes will be able to leverage less complex rules and regulations of OZs to create economic prosperity, as they have gained 20+ years of experience working with past development programs, such as NAHASDA.

³ Nancy M. Pindus, "Why Opportunity Zones are important for Indian Country," <https://www.urban.org/urban-wire/why-opportunity-zones-are-important-indian-country>.

Once an area is selected and determined as an OZ the designation lasts over 10 years. Coincidentally the CTUIR's current Reservation boundary is outlined as an opportunity zone. It is one out of 86 selected areas in the State of Oregon as an OZ.

Figure 4: Opportunity Zone for CTUIR



Source: Map of Opportunity Zones, https://opportunityzones.hud.gov/resources/map_2023

Broadband Investment

In 2022, the CTUIR received over \$15.5 million of federal funding to provide fiber installation for high-speed internet in more than 342 households without existing service on the Reservation.⁴ This expansion will allow more access to remote services such as telework, telehealth appointments, and remote education and learning opportunities. The expansion is a part of a 5-year and on-going broadband project conducted by the DECD.

Additionally, the extended service to more residents creates other opportunities that the Tribes may capitalize on in the future. One example is the opportunity for students and youth on the Reservation to further their education with online learning from adjacent education facilities such as Northwest Indian College, Eastern Oregon University, University of Oregon, Oregon State University, Walla Walla Community College, Columbia Basin Community College and Blue Mountain Community College, to name a few.

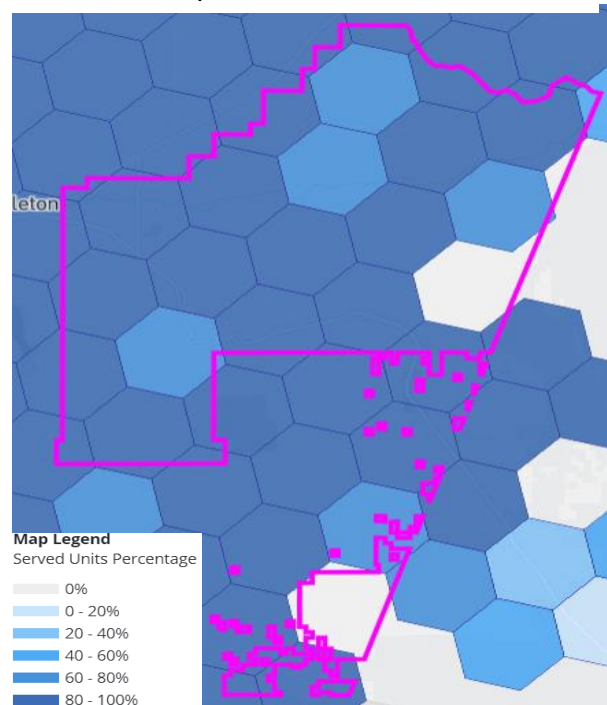
Wildhorse Resort & Casino

Established in 1995, the Wildhorse Resort & Casino has been a prime source of revenue for CTUIR over the decades. The initial establishment of the Casino sparked ongoing developments on the Reservation such as Arrowhead Travel Plaza, purchased in 1999 and remodeled in 2009; and Mission Market, updated in 2003. Between the years of 2000 to 2004 work continued with: the expansion and remodeling the Casino for staff space, the Rivers Event Center addition, and the Children's Entertainment Center, to name a few. Expansion and further developments continued in 2005 to 2009 with the conversion of Tradition Buffet, add-on of Plateau Fine Dining; and the Wildhorse Sports Bar and Wild Roast Coffee Bar, which provide guests and visitors an increase of eatery and dining options during their time at the Resort and Casino.


The years between 2010 to 2014 brought tremendous development, the construction of the 200-room tower hotel, along with a five theater Cineplex and increase gaming floor space. The new capacity allowed Wildhorse to staff over 800 employees, space for RV parking and the addition of a newly purchased Golf Course. Later in 2019, CTUIR bought Hamley's

⁴ <https://www.merkley.senate.gov/news/in-the-news/over-155m-awarded-to-install-broadband-on-umatilla-reservation>

Figure 3: Residential Fixed Broadband within CTUIR, 2022



Source: FCC National Broadband Map, 2023



Western Store, Steakhouse & Saloon and the Pendleton Country Club, now operated by Wildhorse. This cluster of amenities provides an avenue for telling the Tribe's story to both tribal members and visitors. In 2020, Wildhorse extended its facilities, particularly the Family Entertainment Center, which includes a 24-lane bowling center, an arcade, and a food court, which hosts Tribal member owned eateries Mo Pho and Brigham Fish & Chips. The ongoing work to build and market Wildhorse as a destination resort-will continue to serve CTUIR as a hub for tourism and entertainment, as well as serve as a nexus to market and promote local smaller events and businesses to tourists and visitors.

Nixyáawii Community Financial Services (NCFS) – Community Development Financial Institution (CDFI)

The financial survey done in 2016 and the 2017-2021 CEDs showed a strong need for a financial institution for not only CTUIR members, but all residents of the Reservation. Many members attested in the 106 survey that they did not feel comfortable going to a bank or chose to not have financial security⁵. As a result of this established need, along with a CDFI feasibility study, CTUIR was able to secure funding to establish Nixyáawii Community Financial Services (NCFS) in October 2020. The organization was formed from a consolidation of programs such as the Wildhorse Resort & Casino Business Development Services, Housing Department Homeownership Program, and Tribal Credit Program. NCFS not only serves clients for lending and homeownership services, but they also provide business development services. In-depth services are outlined in the [Key Industry Clusters chapter](#):

- Technical assistance
- Financial and entrepreneurship education
- Financial coaching

The NCFS team in collaboration with DECD are in the process of establishing an Emerging Business Center (EBC), which will provide a central location for current and potential small business owners and entrepreneurs to network, receive training, and attend classes and workshops. It will also provide a space for conferences, meetings, and much more to serve a range of startup businesses. For current and future generations these services will serve as foundational pieces to utilize for continued economic and cultural business development for CTUIR.


Energy

The CTUIR Board of Trustees adopted a Strategic Energy Plan (SEP) in October 2022. This will serve as a guide in terms of energy use, and associated projects will outline energy goals over the next 5 years. The plan is intended to help mitigate and adapt to climate change, preserve and restore Treaty Reserved Rights, and advance economic development and energy sovereignty.

⁵ Native CDFI for Umatilla Indian Reservation: Business Plan, Nixyáawii Community Financial Services, 2016

Energy recommendations within the context of the CTUIR SEP four main objectives include:

- Defining existing energy landscape -
- Developing common energy vision for the community -
- Identifying and assessing Energy Opportunities -
 - Determine the need, costs, and benefits of establishing and seeking certification of a TEDO versus a TERA to develop all, or a portion of, the tribe's energy resources. Consider these options along with potential alternative pathways for energy project development.
 - Conduct a technical and financial feasibility assessment to confirm the viability of establishing an energy auditing skills training program through the CTUIR. This would allow CTUIR to train community members in how to conduct assessments related to energy generation feasibility and audits related to existing energy conservation efforts.
 - Develop a vehicle electrification plan for fleet passenger vehicles serving the CTUIR.
 - Conduct a feasibility assessment for developing a seed fund to provide financial assistance to energy projects that benefit the CTUIR and its Tribal Members
 - Conduct a feasibility assessment of a loan program in partnership with NCFCS that is focused on energy projects for CTUIR community members.
 - Develop a program to assess all homes on the UIR for energy efficiency and supply opportunities.
 - Develop a program to assess all commercial facilities on the UIR for energy efficiency and conservation opportunities.
 - Develop a program to assess the technical and financial feasibility of rooftop solar PV at all residential rooftops in the UIR.
 - Develop a program to install smart meters at homes and businesses within the UIR.
- Charting a roadmap to execute the Energy Vision -
 - Complete the ongoing feasibility assessment of a community-scale solar project to serve the Coyote Business Park or community housing
 - Complete the ongoing technical, financial, environmental, and social feasibility assessment of centralized geothermal electricity generation.
 - Continue the existing policy of replacing segments of overhead power distribution lines on poles with underground lines in trenches and conduit.
 - Develop tracking methodologies for metrics related to environmental, cultural, and social targets.
 - The CTUIR SEP provides a consolidated baseline summary of existing energy usage and energy related GHG emission metrics. As the SEP is implemented, continue tracking these metrics and regularly report on progress toward the targets related to energy usage and GHG emissions.



Since the CTUIR Strategic Energy Plan was completed awareness of the need for clean energy solutions to mitigate the climate crisis has accelerated. As a result, more funding is becoming available through programs like the EPA's Greenhouse Gas Reduction Fund. Additional CEDS energy recommendations for CTUIR include positioning to be a recipients of funding from Native CDFIs like NDN Fund and Oweesta, and networks like the Native CDFI Network and the Opportunity Finance Network.

Natural Hazard – Mitigation

As of 2021, The CTUIR Public Safety Department has updated the Tribe's Hazard Mitigation Plan and it has been approved. The overall purpose of the plan is to review and determine both natural and human-caused hazards that could potentially cause death, injury, or inflict damage to property within the UIR. The plan is also designed to determine the types and risks related with the identified hazard. This plan meets the federal requirements of tribal hazard mitigation plans from section 201.7 of the 44 Code of Federal Regulations (CFR). FEMA (Federal Emergency Management Agency) and satisfies an eligibility requirement for federal grant funds to prepare a hazard mitigation plan.

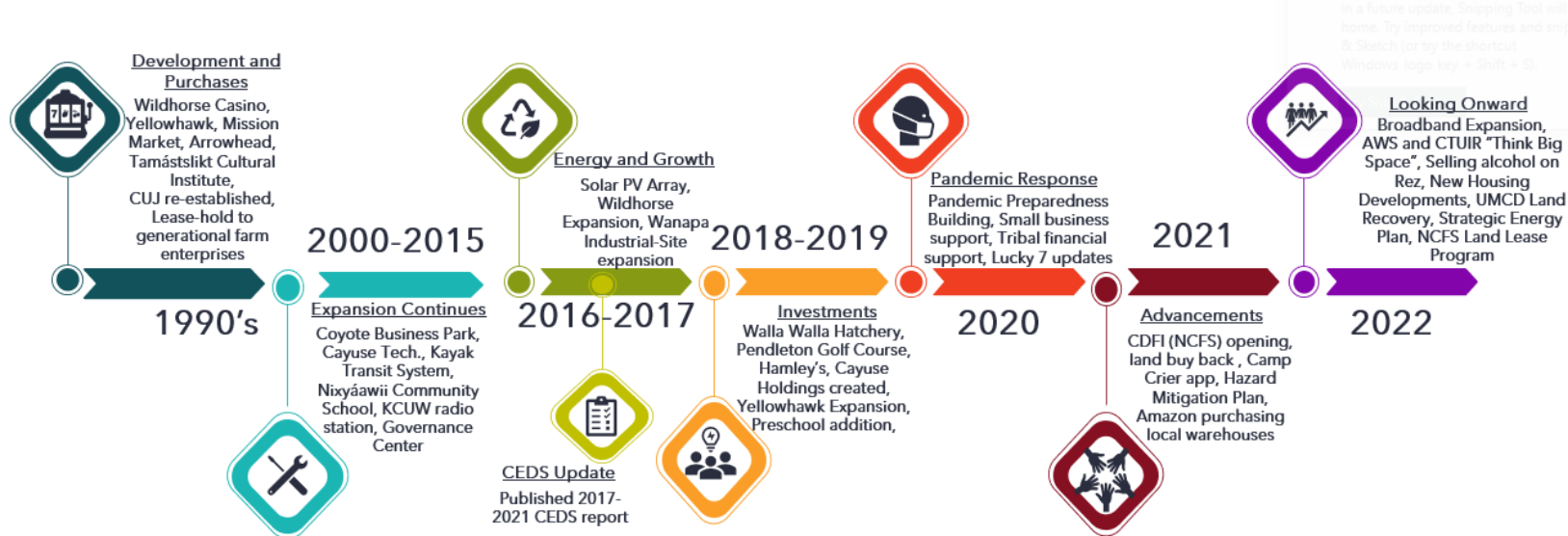
An important aspect of being disaster resistant is preventing hazardous events from transforming into disasters. This is crucial for CTUIR residents, especially in the last few years of flooding, regional fires, and the impact of climate change.

CTUIR Economic & Community Development Timeline

Through collaborative discussions with the CTUIR, our team has compiled a comprehensive timeline showcasing significant achievements spanning approximately three decades, which can be seen in Figures 5 and 6 below. Over this period, the DECD has funded nearly 30 diverse projects, ranging from commercial ventures like the first stage of the Wildhorse Resort, Tamástslíkt Cultural Institute and Cayuse Technologies, to residential initiatives such as the RV Park and Timíne Housing.

The DECD's investment in these community-driven projects has amounted to approximately \$157 million since the early 1990s, with the highest expenditures occurring between 2018 and 2019. Notably, during this peak period, the department allocated funds towards the Yellowhawk Tribal Health Clinic facility, the renovation of the Recreation Center, enhancements to Indian Lake, and the development of Nixyáawii Education Center. It is important to acknowledge that planning projects can sometimes seem detached from the everyday lives of community members. Thus, when communicating the Community Economic Development Strategy (CEDS) to the community, it is vital to emphasize tangible and valuable projects that have demonstrably enhanced their quality of life, in alignment with and as a result of previous CEDS initiatives.

Figure 5: Development Timeline of CTUIR Investments and Projects, 1990-2022

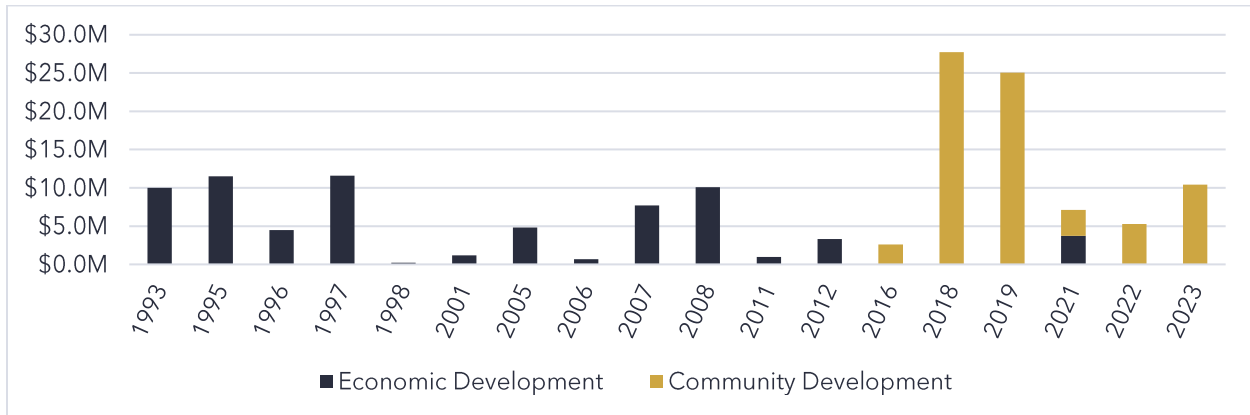


Source: Points Consulting communication with CEDS Committee

In the early to mid-months of 2023, more projects and investments were completed by CTUIR departments and entities that are not shown in the above figure. The investments, projects, plans and establishments are as follows:

- Updates and approval of the Emergency Operations Plan
- The Timíne Way North Apartments ribbon cutting

Figure 6: Economic and Community Development Project Spending by Year, 1993-2023



Source: CTUIR Department of Economic and Community Development

Socioeconomic Overview

In most communities in the United States, analysts rely upon a combination of data sources from state and federal statistical organizations. Common sources at the federal level include the US Census Bureau and the Housing and Urban Development (HUD), among others. Tribal areas are a challenge to survey accurately due to a combination inadequate and culturally-based federal data collection policies and practices, of tribal communities’ mistrust of government agencies, non-traditional employment and residential patterns, and other cultural differences. For these reasons, these standard means of data collection have historically proven to be inaccurate. The only relatively reliable source of federal data is the Federal Reserve Bank of Minneapolis’ Reservation Profile data base.⁶

Points Consulting (PC) also relies upon several other proprietary sources, as well as the community survey conducted as a component of this analysis in order to arrive at the data presented here. These socioeconomic data are a key component that allows us to paint a picture of the characteristics of the population in the Reservation, which are essential to understand when developing a regional economic development strategy.

One of the main takeaways from this chapter is how well the Confederated Tribes of the Umatilla Indian Reservation (CTUIR) fares on socioeconomic metrics when compared to other reservations in Oregon. For instance:

- In 2021, the average unemployment rate for all other Oregon reservations was around 11.7%, while the average unemployment rate for the CTUIR Reservation was about 8.1%.
- And, in 2021 the median household income for households in the CTUIR Reservation (\$64K) was considerably higher than the average median household income figure for rest of the reservations in the state (\$32K).⁷

⁶ Reservation Profile for the CTUIR Tribe:

<https://www.minneapolisfed.org/indiancountry/resources/reservation-profiles/umatilla-reservation>

⁷ US Census Bureau, American Community Survey 2017-2021 5-Year Estimates

Demographics of the CTUIR Reservation

Nationally, an increasing number of people are identifying as American Indian and Alaska Native (AIAN). Between 2000 and 2010, the AIAN cohort increased 27% at the national level. Many tribal areas are adjacent to urban and micropolitan centers and, in some areas, reservations have been fully encircled by urban population centers. AIAN populations living in counties adjacent to reservations tend to fare better in terms of income and poverty statistics. Similarly, the population of the CTUIR has been growing in recent years.

The Reservation has a total population of 2,861, with a demographic composition of both American Indian and Alaska Native (AIAN) and non-AIAN residents. It is important to note that individuals of Native descent and those without Native descent reside on tribal lands. Tables 1 and 2 show some basic demographic details for the CTUIR Reservation, including the racial and ethnic composition of the area, as well as the median age of residents by gender.

The distribution of AIAN and non-AIAN residents in the Reservation area are nearly evenly split, with a little over half of the residents identifying as American Indian and Alaska Native and slightly less than half identifying as non-American Indian. American Indians in the CTUIR reservation are younger than most Americans. To be more specific, AIAN populations have a lower median age than the median for all races at the national level. The median age for AIANs in the CTUIR Reservation is around one year lower than AIAN populations across the US, and about six years lower than the median age for all US residents. However, the population for all races in the CTUIR Reservation is around five years higher than the national median. This means that the non-AIAN populations in the CTUIR Reservation tend to be older than the American Indian residents in the Reservation. Also, there is a large gap in the median age between AIAN males and females in the Reservation of around 8 years—larger than the gap at the national level for all races, as well as for all AIANs in the US. This means that American Indian males in the CTUIR Reservation are generally younger than their female counterparts.

Population Characteristics

Table 1: CTUIR Reservation Demographics

Group	Population	Share
White alone	1,185	41.4%
Two or more races	202	7.1%
Some Other Race alone	23	0.8%
Native Hawaiian and Other Pacific Islander alone	8	0.3%
Black or African American alone	<10	--
Asian alone	0	--
Total Non-AIAN	1,418	49.6%
Total AIAN	1,442	50.4%
Total Population	2,861	100.0%

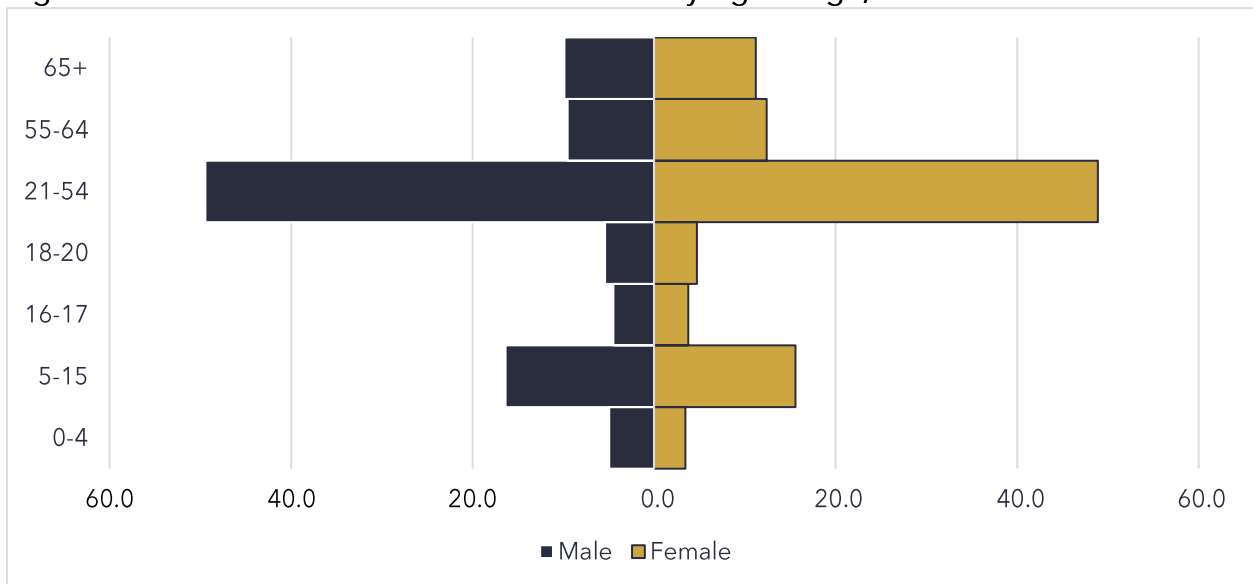
Source: US Census Bureau, 2020 DEC Redistricting Data

Table 2: Median Age by Gender

Geography	Male	Female	Overall
---All Races---			
CTUIR Reservation	40.4	44.4	42.7
United States	36.5	39.1	37.8
---AIANs---			
CTUIR Reservation	25.7	33.8	31.6
United States	31.4	33.6	32.5

Source: Federal Reserve Bank of Minnesota, Reservation Profiles, 2013-2017 American Community

Figure 7: Total Enrolled CTUIR Tribal Members by Age Range, 2022



Source: Confederated Tribes of the Umatilla Indian Reservation, Tribal Member Demographic Information, 2022

Educational Attainment

Regarding educational attainment, AIANs in the CTUIR Reservation lag slightly behind other races. Table 3 shows the educational attainment rates in the CTUIR reservation by race and Figure 8 shows a comparison of educational attainment rates by geography. A large number of AIAN males do not have any college education, but their rates of bachelor's degree attainment are higher compared to AIAN females, and all other races in the Reservation. However, AIAN totals fall behind the totals for other races at the postsecondary level.

The majority of CTUIR Reservation residents aged 25 and over fall in the category of "some college education without a degree" (around 29%), which is a higher rate than the county, state, and national levels. However, the level of GED/Alternative Credential attainment in the CTUIR Reservation is also higher than the rest of the regions, which is indicative of higher

high school dropout rates. Studies have shown that the high school dropout rates for the US AIAN population is the highest out of all races—at 9.6%.⁸

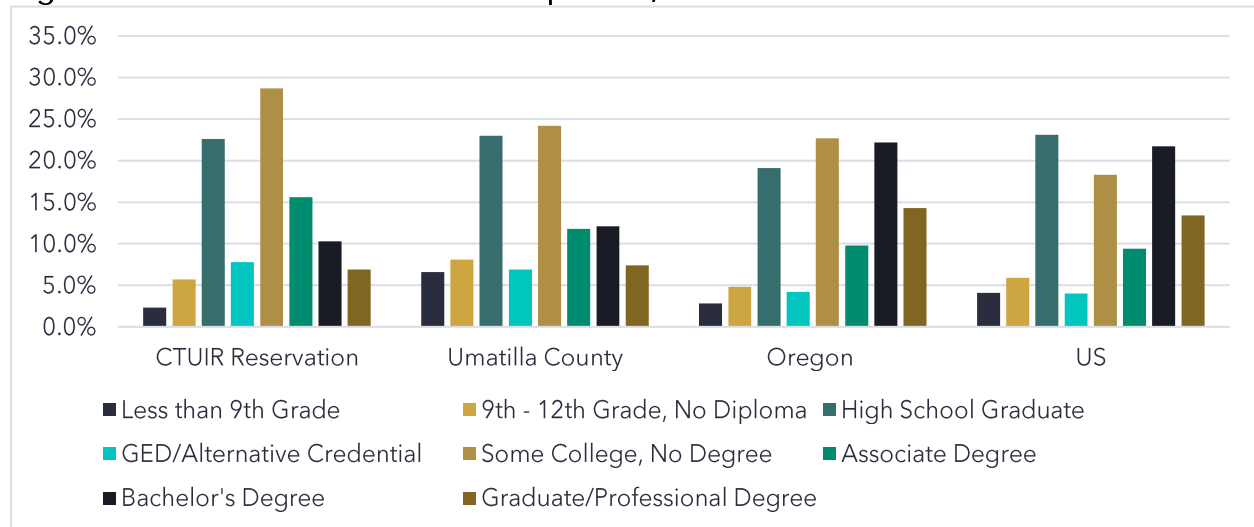
Educational attainment is important to note because educational attainment is integral to good economic development outcomes. In fact, economic research shows that education plays a vital role in increasing labor productivity, contributing anywhere from 13 to 30 percent of the total productivity increase. In essence, this means that investments in education (human capital) are comparable to investments in financial capital or equipment in terms of how they boost economic growth.⁹

Table 3: Educational Attainment – Population 25 Years and Older in CTUIR Reservation

Group	AIAN Female	AIAN Male	AIAN Total	All Races
Less than high school diploma	11.2%	18.4%	13.9%	10.6%
High school graduate, GED, or equivalent	29.4%	32.7%	30.7%	26.9%
Some college or associate degree	51.0%	31.3%	43.7%	46.2%
Bachelor's degree or higher	8.4%	17.5%	11.8%	16.3%

Source: Federal Reserve Bank of Minnesota, Reservation Profiles, 2013-2017 American Community Survey

Figure 8: Educational Attainment Comparison, 2022



Source: Esri Business Analyst, 2023

Crime and Drug Use

Criminal activity can reduce current and future economic productivity and generally negatively impact community morale. Research has shown that individuals that come from low-income backgrounds are more prone to committing crimes and are also more likely to

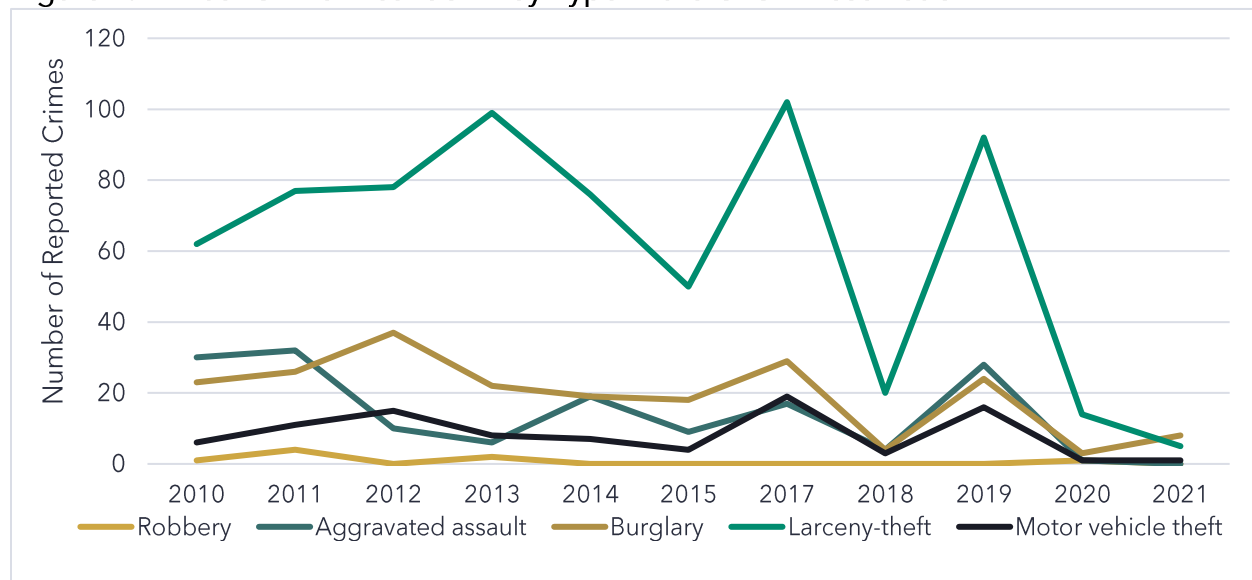
⁸ Imed Bouchrika, "High School Dropout Rate Is Decreasing but Race, Income & Disability Issues Persist", Research.com, 2023 [https://research.com/education/high-school-dropout-rate#:~:text=Dropout%20Rate%20by%20Race&text=The%20rates%2C%20however%2C%20remain%20high,%25%20\(NCES%2C%202021\)](https://research.com/education/high-school-dropout-rate#:~:text=Dropout%20Rate%20by%20Race&text=The%20rates%2C%20however%2C%20remain%20high,%25%20(NCES%2C%202021))

⁹ Gary S. Becker, "Human Capital: A Theoretical and Empirical Analysis with Special Reference to Education", 1994

be the victims of it.¹⁰ Additionally, a report from the National Congress of American Indians states that Indian reservations face violent crime rates that are 2.5 times higher than the national rate, with some reservations seeing that rate rise as high as 20 times the national rate of violence.¹¹ The average violent crime rate in the CTUIR Reservation has hovered around 1.8 times the national rate over the past ten years, with some years having little or no reports of violent crime.¹²

Figure 9 displays the number of reported crimes per year, covering a wide range of criminal activities. Over the years, property crimes, including burglary, motor-vehicle theft, and larceny-theft, have been the most frequently reported crimes on the Reservation. Specifically, larceny-theft has been the most prevalent type of property crime. The incidence of aggravated assault, the most commonly reported violent crime, has been gradually decreasing since its peak in 2011. Despite yearly fluctuations, overall crime rates have shown a downward trend since 2010. It is also worth noting that the CTUIR Reservation began providing data to the National Incident-Based Reporting System (NIBRS) on March of 2021, which means that post-2021 data may have improved reporting accuracy when compared to previous years.

Figure 9: Annual Crime Breakdown by Type in the CTUIR Reservation



Source: Federal Bureau of Investigation (FBI) Crime Data Explorer, National Incident-Based Reporting System (NIBRS), 2021

¹⁰ A. Sethi et al. "The Relationship between Crime and Socioeconomic Status", ArcGIS StoryMaps, <https://storymaps.arcgis.com/stories/b5ab6df3741649c4bcc0a5fbd9e3b45b>

¹¹ "Background on Tribal Justice & Law Enforcement", National Congress of American Indians, 2011 https://www.ncai.org/attachments/PolicyPaper_AbDtrAjPdZqsCFZiPiORyUiOSZqZrAPgxWxVKAJGBfxcDdmgrUC_Background%20on%20Tribal%20Justice%20and%20Law%20Enforcement_NOV.pdf

¹² PC calculation based on rates reported by NIBRS and US rates reported at <https://www.statista.com/statistics/191219/reported-violent-crime-rate-in-the-usa-since-1990/#:~:text=In%202021%2C%20the%20violent%20crime,per%20100%2C000%20of%20the%20po pulation>

Substance abuse is a pressing concern often associated with poverty and low-income populations. While a definitive cause-and-effect relationship between poverty and drug abuse has not been established, studies suggest that substance abuse problems are more prevalent in low-income communities.¹³ American Indian and Alaska Native communities, in particular, experience alarmingly high rates of substance abuse compared to other ethnic groups in the United States.¹⁴ In fact, AIANs have the highest rates of alcohol, marijuana, cocaine, and hallucinogen abuse rates in the nation.¹⁵

The 2021 Community Health Assessment conducted by Yellowhawk Tribal Health Center indicates that approximately 6% of the surveyed individuals within the CTUIR reservation sought smoking or substance abuse treatment for themselves or a loved one in the past year.¹⁶ This highlights the prevalence of substance abuse in the community, which is reportedly widespread, with many people struggling with alcohol abuse, as well as methamphetamine or opioid abuse, according to reports from the Confederated Umatilla Journal.¹⁷ Moreover, staff members at Yellowhawk have noted that around 75% of patients treated for substance abuse in the Reservation tend to relapse, underlining the challenges faced in addressing substance abuse in the community.

However, it is important to highlight that the CTUIR community hosts events to promote healthy lifestyles for Native American youth, in addition to providing the above-mentioned substance abuse treatment. One such event is the annual Basketball Against Alcohol and Drugs (BAAD) tournament. This tournament brings together teams from various tribes and communities, fostering healthy competition while simultaneously promoting substance abuse prevention and overall wellness. Serving as a platform for raising awareness about the dangers of drug and alcohol abuse, the tournament strongly emphasizes the importance of making healthy choices.

Figure 10 demonstrates some of the barriers that households who needed substance abuse treatment in the past year mentioned in their survey. Most mentioned they were not ready to receive treatment, while the other major barriers were what were described as “other reasons”, and fear of treatment.

Figure 10: Primary Barriers for Households who Needed Substance Treatment in the CTUIR Reservation

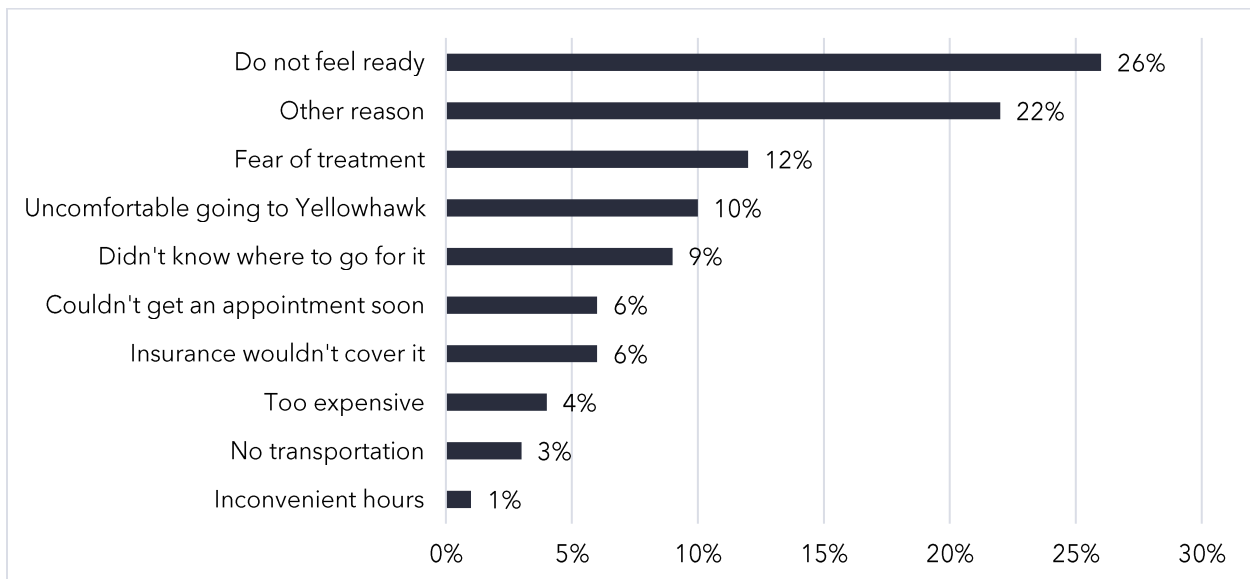
¹³ “How Does Addiction Impact Low-Income Americans?”, Addiction Center, <https://www.addictioncenter.com/addiction/low-income-americans/>

¹⁴ Michael Kaliszewski, “Alcohol and Drug Abuse Among Native Americans”, American Addiction Centers, 2022 <https://americanaddictioncenters.org/rehab-guide/addiction-statistics/native-americans>

¹⁵ D. Dickerson et al., “American Indians/Alaska Natives and Substance Abuse Treatment Outcomes: Positive Signs and Continuing Challenges”, National Library of Medicine, J Addict Dis., 2011

¹⁶ Yellowhawk Tribal Health Center 2021 Community Health Assessment

¹⁷ Wil Phinney, ‘Sober Transition’ homes may open in August”, Confederated Umatilla Journal, 2020, <https://cuj.ctuir.org/2020/05/sober-transition-homes-may-open-in-august/>



Source: Yellowhawk Tribal Health Center Community Health Assessment, 2021

Financial Characteristics

According to US Census data, Native Americans in all reservations have the highest rate of poverty among all minority groups in America, with 25.4% of the population under the poverty threshold, as compared to 12.6% of Americans overall.¹⁸ With a jobless rate that peaked at 28.6% during the pandemic, AIANs have been one of the most harshly impacted sectors of the population due to COVID-19. However, the disparity between Native Americans and the rest of the population in unemployment and poverty numbers existed before the pandemic. Out of the 300 or so Native American reservations in the US, very few have consistently well-functioning economies, which forces residents to have to travel outside of the reservation to access stores, banks, jobs, and higher education institutions.¹⁹ However, because of the proximity of the City of Pendleton to the CTUIR Reservation, local businesses and entrepreneurs have greater access to a larger market and client base. Having the City of Pendleton nearby can serve to provide more job opportunities and other resources to tribal members, which can help to support the local CTUIR Reservation economy. Other examples of reservations with strong economies that lie close to cities include the Oneida Reservation, which is close to Green Bay, Wisconsin, and the Mohegan Reservation, which is in proximity to New Haven and Hartford, Connecticut.

To obtain a better understanding of the financial health of households in the CTUIR Reservation, it is essential to look at metrics such as median income and expenditures. Figure

¹⁸ Dedrick Asante-Muhammad et al., "Racial Wealth Snapshot: Native Americans", NCRC, 2022, <https://ncrc.org/racial-wealth-snapshot-native-americans/#:~:text=Poverty%20Rates,rate%20among%20all%20minority%20groups>

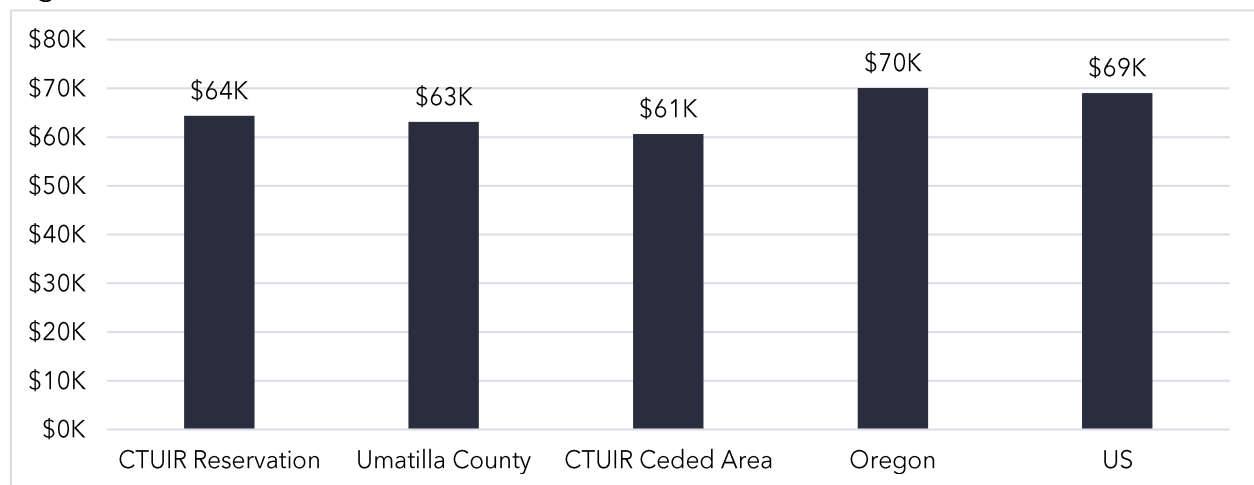
¹⁹ Robert J. Miller, "Establishing Economies on Indian Reservations", The Regulatory Review, 2021, <https://www.theregreview.org/2021/04/08/miller-establishing-economies-indian-reservations/#:~:text=Few%20of%20the%20300%20Indian,%2C%20higher%20education%2C%20and%20jobs>

11 shows a comparison of median household incomes by region. The CTUIR Reservation has a median household income of \$64K, which is like that of the county (\$63K). However, both the Reservation and the county have lower median household incomes than the state (\$70K) and the US (\$69K).

Figure 12 illustrates the distribution of household income among various ranges by region. The Reservation has a larger share of households that earn a median income of less than \$10K when compared to the county, the state, and the nation. On the other hand, the CTUIR Reservation also has a higher proportion of households with median incomes between \$100K and \$200K than the other regions shown in the figure. This is significant because this median income range is \$30K above the national level. Additionally, while there are a larger proportion of households earning a median income of over \$200K at the national level, the Reservation also has a large number of households in this range—surpassing the state and the county in this income range as well. However, it is worth noting that the median income for enrolled tribal members in the reservation may differ from the median income reported for the reservation area.

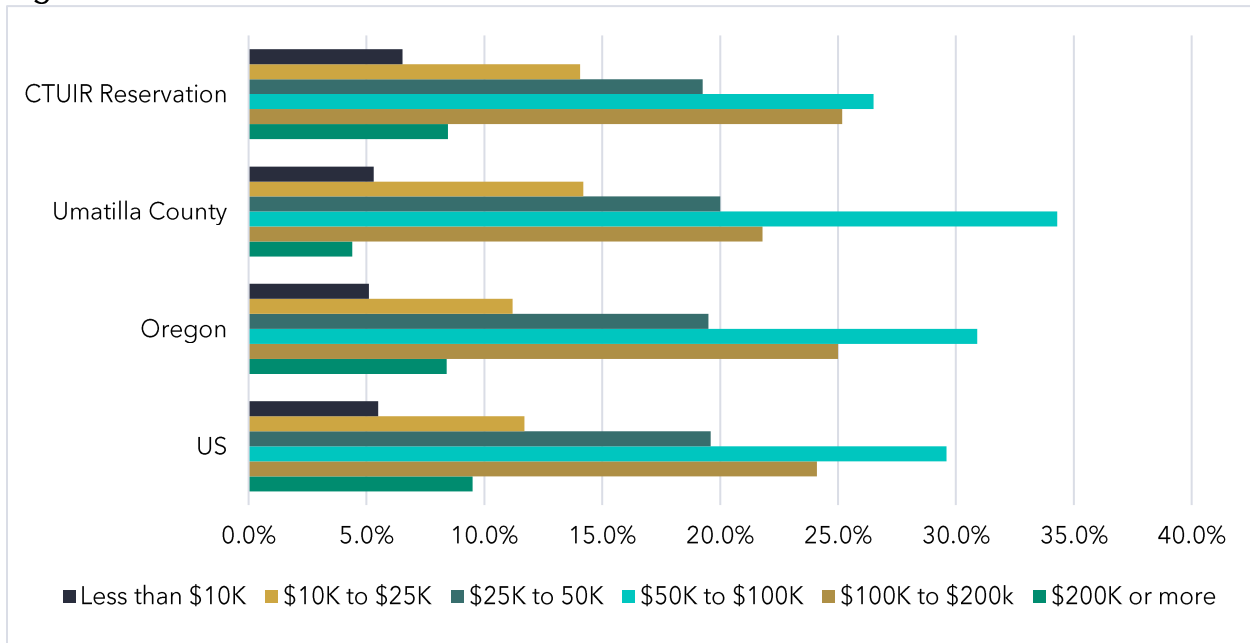
These higher income households can be critical players in the economic development landscape of the Reservation. Their experience, knowledge and capital can be leveraged to help Native business owners who aspire for similar economic success.

Figure 11: Median Household Income



Source: American Community Survey 5-Year Estimates, 2017-2021

Figure 12: Household Income Distribution



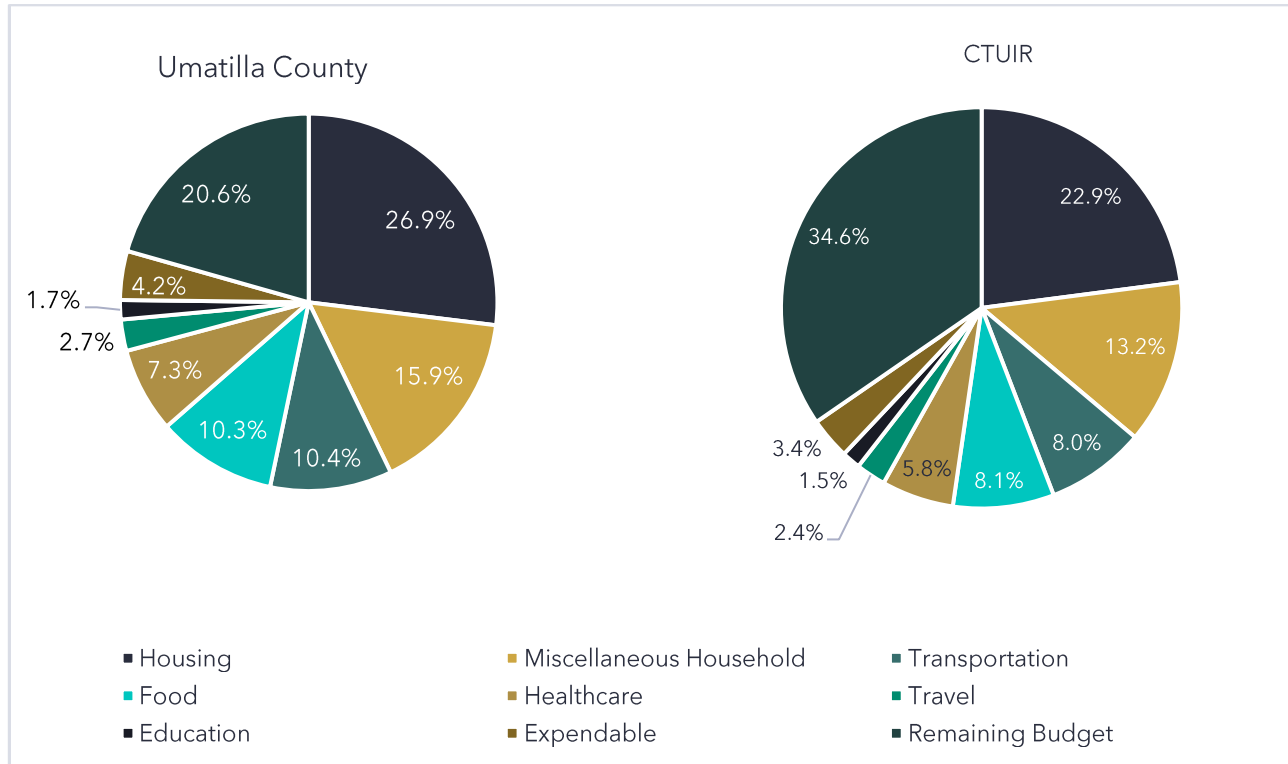
Source: American Community Survey 5-Year Estimates, 2017-2021

Figure 13 shows a breakdown of the average monthly expenditures for CTUIR households, while Table 4 shows a comparison of the available disposable income by region. The largest average monthly expenditure for CTUIR Reservation residents is housing (including utilities), followed by miscellaneous household spending, which are also the largest spending categories at the county and state level.²⁰

In general, average expenditures at the state level are similar to those of the Reservation, but tend to be higher in each category. The opposite is true at the county level, where average monthly expenditures hover around the \$6.2K mark, as opposed to the Reservation’s average expenditure level of \$7.3K, and the state’s \$7.4K. In terms of disposable income—or after-tax income—a small majority of the households in the Reservation have household disposable income levels between \$100K and \$150K, which is around \$30K higher than most households at the state level. There remains a wide gap between the highest household disposable incomes and the lowest household disposable income, which is worth noting.

²⁰ Miscellaneous household expenditures include apparel and services, personal care products, funeral expenses, legal fees, banking service charges, accounting fees, credit card membership fees, shopping club membership fees, support payments, life insurance, and pensions and social security.

Figure 13: Comparison of Average Monthly Expenditures, 2022



Source: Esri Business Analyst, 2022

Table 4: Households by Annual Disposable Income, 2022

Annual Disp. Income	CTUIR Reservation	Umatilla County	Oregon	US
<\$15,000	8.2%	9.6%	9.1%	9.8%
\$15,000-\$24,999	11.4%	11.7%	8.6%	8.8%
\$25,000-\$34,999	8.0%	11.2%	9.4%	9.3%
\$35,000-\$49,999	12.1%	16.3%	14.8%	13.7%
\$50,000-\$74,999	17.4%	20.1%	19.6%	19.5%
\$75,000-\$99,999	16.9%	13.3%	13.9%	12.1%
\$100,000-\$149,999	19.5%	13.0%	17%	16.4%
\$150,000-\$199,999	3.3%	2.5%	3.9%	5.4%
\$200,000+	3.2%	2.3%	3.7%	5.0%

Source: Points Consulting using Esri Business Analyst, 2022

Given that housing is the largest expenditure for households in the CTUIR Reservation, it is crucial to understand how this impacts low-income households and how it varies based on household composition. Table 5 compares the Reservation's housing cost burden to the county, state, and national levels. Before delving into the table, it's important to define what housing cost burden entails. The U.S. Department of Housing and Urban Development (HUD) defines cost-burdened families as those who spend over 30% of their income on housing and may face difficulty affording basic necessities such as food, clothing, transportation, and healthcare.

“Infrastructure is so important to all of our lives. Let's give our people something to come "home" to, such as affordable housing, being able to build on their own lands by having our own engineers and surveyors, this may make it easier for [Tribal Management] to build on multi owner lands.” -Anonymous survey response

With this context in mind, it is worth noting that the CTUIR Reservation fares well in this regard when compared to other regions in the table. This is a testament to the CTUIR Housing Department who, with their over \$2 million budget served roughly 130 households in 2022.²¹ When both renters and homeowners are taken into account, nearly 80% of households in the Reservation area are classified as "Not Cost-Burdened." Moreover, less than 9% of households are classified as "Severely Cost-Burdened," while the state has almost 15% of households in this category. Nevertheless, these metrics take into account AIAN and Non-AIAN households in the CTUIR, so levels of cost burden exclusively among tribal members may differ from these figures.

Table 5: Housing Cost-Burden, 2015-2019

Region	Number of Households	Severely Cost-Burdened	Cost-Burdened	Not Cost-Burdened
CTUIR Reservation	1,035	8.5%	10.9%	78.3%
Umatilla County	26,910	10.7%	14.4%	74.0%
Oregon	1.6M	14.6%	17.3%	66.9%
US	121.9M	13.5%	15.7%	69.3%

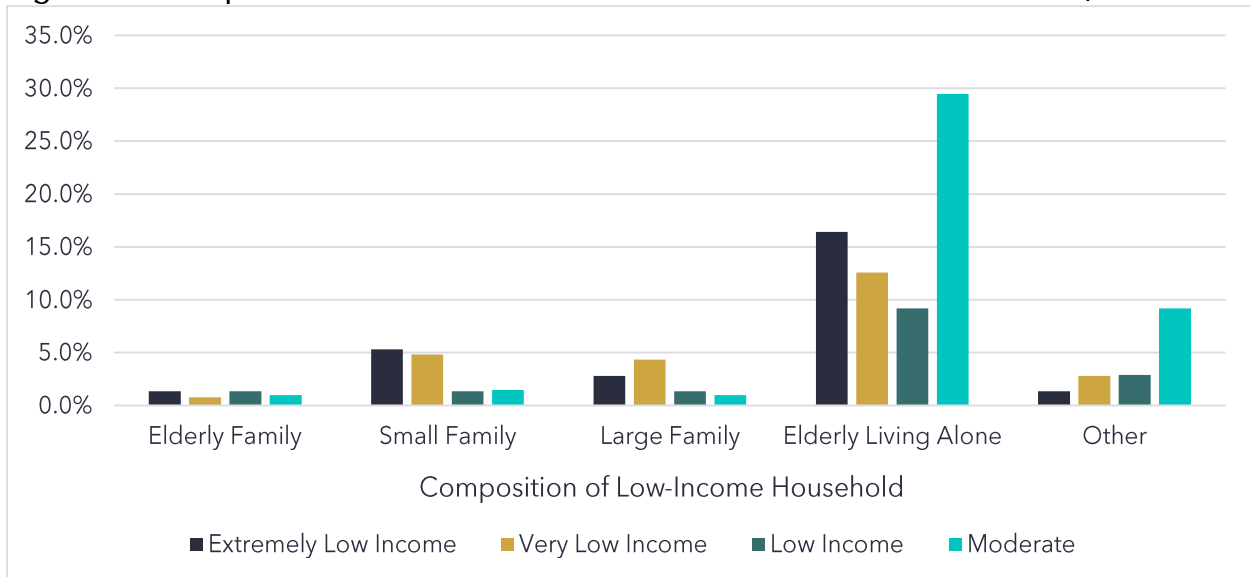
Source: Housing & Urban Development Comprehensive Housing Affordability Strategy Data, 2015-2019

Many of these households struggling to afford housing can often be classified as low-income. HUD describes low-income households as those that earn at or under 80% of the area median income (AMI). In the case of the CTUIR Reservation, this includes households that earn around \$50K or less. As Figure 14 shows, the majority of low-income households in the Reservation are elderly people living alone, ranging from extremely low-income to moderate-income. These results correspond with data collected at the national level that show that older Americans who live alone are more likely than those who live with others to be poor.²²

²¹ CTUIR Housing Department, Annual Budget Report 2022, <https://ctuir.org/departments/housing/budget-reports/>.

²² R. Stepler, "Well-being of older adults living alone", Pew Research, 2016 <https://www.pewresearch.org/social-trends/2016/02/18/3-well-being-of-older-adults-living-alone/#:~:text=These%20survey%20findings%20are%20in,with%20others%20to%20be%20poor>

Figure 14: Composition of Low -Income Households in the CTUIR Reservation, 2015-2019



Source: Housing & Urban Development Comprehensive Housing Affordability Strategy Data, 2015-2019

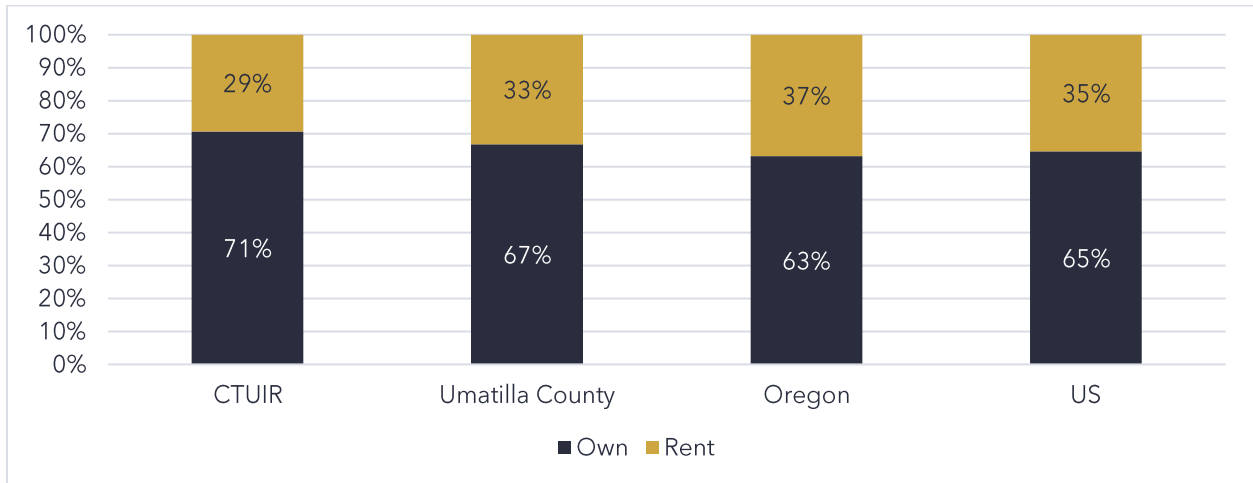
Table 6: Percent Housing by Type

Housing Type	Number of Units	Percentage of Total 2021	Change Since 2018
Occupied housing units	981	87.0%	(3.0%)
Vacant Units	146	13.0%	3.0%
1, detached	718	63.7%	1.0%
1, attached	79	7.0%	2.5%
2 to 4 apartments	35	3.1%	(2.4%)
5 to 9 apartments	3	0.3%	0.3%
10+ unit apartments	41	3.6%	(1.2%)
Mobile home or other type of housing	251	22.3%	0.6%

Source: American Community Survey, 2010 and 2020 5-Year Estimates, Table S2504

Table 6 provides a broad overview of housing in the CTUIR Reservation. Most housing in the Reservation is single-family detached, or single-family homes that are on their own lots and don't share walls with adjacent properties. The reservation has seen vacancies rise 3% since 2018, with the largest unit growth occurring in single-family attached units (2.5%). Single-family attached units are houses such as townhomes, duplexes, and triplexes that share one or more walls with adjacent properties. The Reservation also has a significant number of mobile and manufactured homes, which has slightly increased further in the last three years. Most of the homes in the reservation are owner-occupied (71%), as opposed to renter-occupied (29%). Figure 15 shows how the Reservation has owner-occupancy rates that are 4% higher than those of the county, and 8% than those of the state.

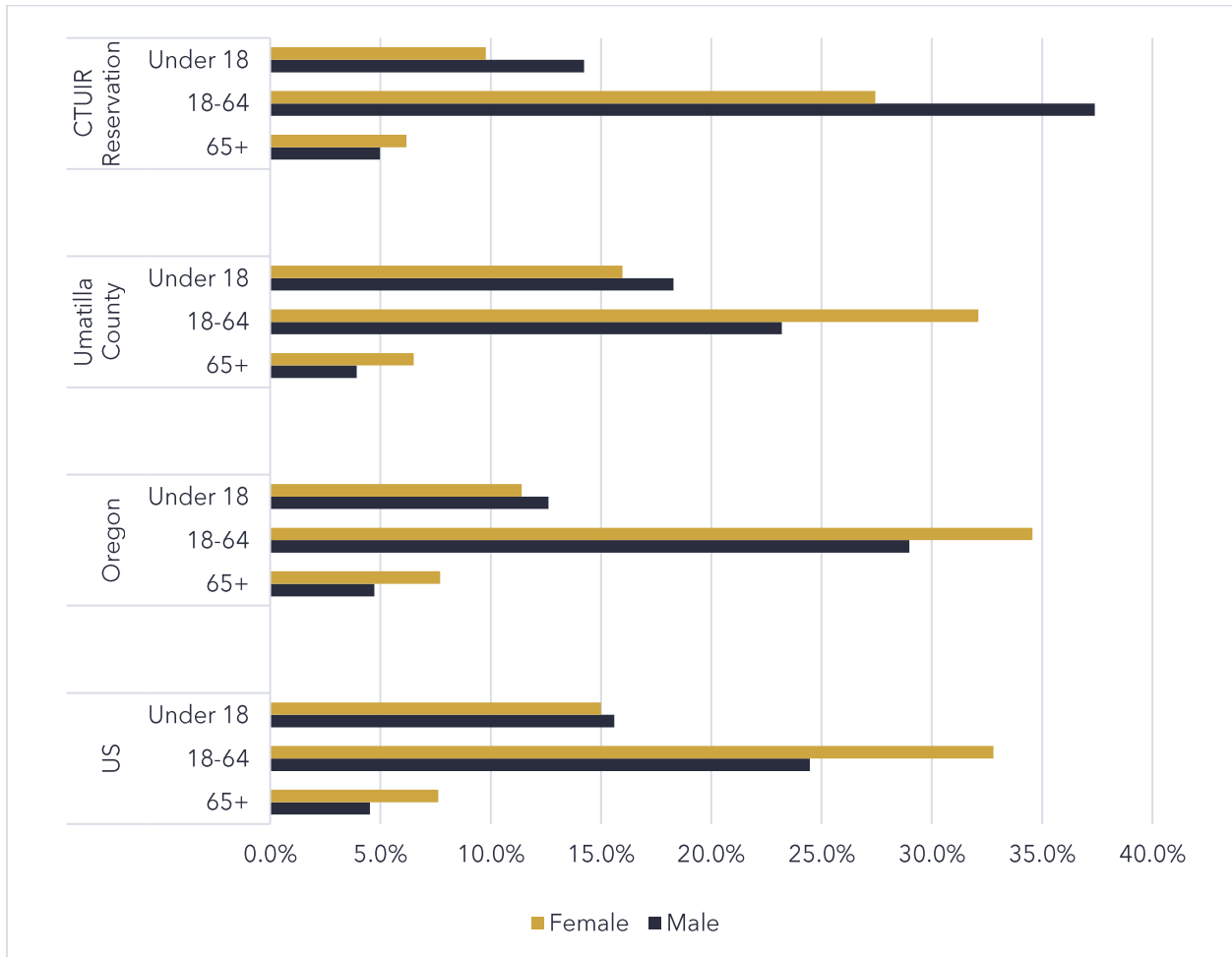
Figure 15: Owner-Occupied and Renter-Occupied Homes, 2021



Source: U.S. Census ACS, 2021

When discussing low-income households, it's also useful to look at poverty rates and how they may vary among genders and age ranges in order to get a more complete profile of the sectors of the population that may be struggling the most. Table 7 shows how poverty rates in the CTUIR Reservation compare to other geography levels by age and gender. The Reservation has higher poverty when compared Umatilla County, Oregon, and the US, at about 7% higher than the state and the nation. Figure 16 shows that for all age ranges apart from senior, males tend to have the highest poverty rates in the Reservation, which differs from the county, state, and national distributions, where females tend to have higher rates of poverty.

Figure 16: Poverty by Age and Gender



Source: American Community Survey 5-Year Estimates, 2017-2021

Table 7: Poverty by Gender, 2021

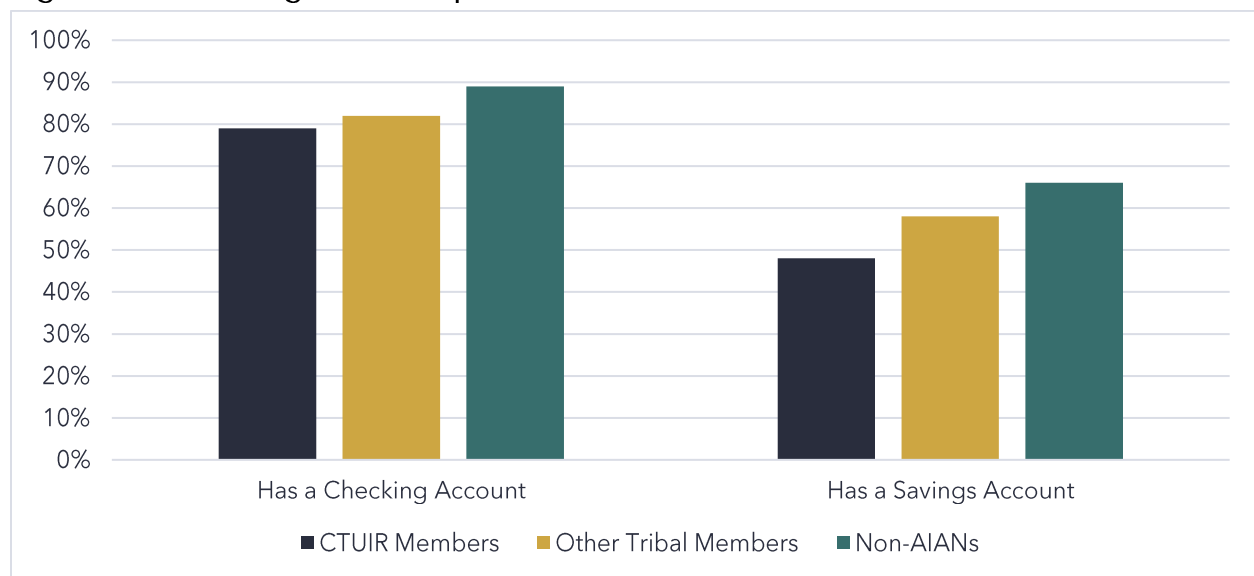
Region	Male	Female	Total	% of Total Population
CTUIR Reservation	330	253	583	19.1%
Umatilla County	4,362	5,244	9,606	12.8%
Oregon	230,977	267,540	498,517	12.1%
US	18M	23M	41M	12.6%

Source: American Community Survey 5-Year Estimates, 2017-2021

In terms of specific low-income units within the Reservation, there are 140 income-based HUD regulation units, with 58 tax credit units that are under HUD and Oregon regulations. Additionally, there are several non-HUD rentals in the area, including some that are under construction as of May 2023. There are 30 apartments for rent that are under construction in Timine Way North that are non-HUD and under CTUIR policy, as well as 31 CTUIR Scatter sites/Lucky 7 units that are non-HUD manufactured home rentals.

In a survey carried out for the Native CDFI for the Umatilla Indian Reservation, responses showed that, despite the higher median incomes and comparable levels of average expenditure to the state level, many CTUIR tribal members are unbanked when compared to members of other tribes across the nation and non-AIANS, as displayed in Figure 17. This means that many members of the Tribes chiefly use cash for their transactions and utilize financial services such as check cashing and payday loans instead of a traditional bank. Many CTUIR tribal members are also living paycheck-to-paycheck, with only 27% of CTUIR members able to cover three or more months of expenses. Despite this, the majority of CTUIR members did not rate their financial situation as “Not Secure”, which suggests that many enrollees may have become accustomed to living with financial insecurity.²³

Figure 17: Percentage of the Population with a Bank Account



Source: *Native CDFI for Umatilla Indian Reservation: Business Plan, Nixyáawii Community Financial Services, 2016*

Economic Overview

The economic activities of the CTUIR Reservation are key drivers of Umatilla County’s overall economy. In fact, the CTUIR is directly or indirectly responsible for around 11 percent of the jobs in the county.²⁴ The Reservation’s economy is driven in part by tourism and agriculture, as well as the Tribe’s CDFI (NCFS), subsidiaries of Cayuse Holdings, and Coyote Business Park. The Reservation also has a wide variety of tourist attractions including Wildhorse Resort, the Tamástsiłkt Cultural Institute, and The Golf Course at Birch Creek, among others.²⁵

²³ Native CDFI for Umatilla Indian Reservation: Business Plan, Nixyáawii Community Financial Services, 2016

²⁴ Antonio Sierra, “Local economy gets mixed grade at Chamber luncheon”, East Oregonian, 2018 https://www.eastoregonian.com/news/local/local-economy-gets-mixed-grade-at-chamber-luncheon/article_7a0bad0d-1087-5f5a-b04e-43ad0b4ee2f7.html

²⁵ Confederated Tribes of the Umatilla Indian Reservation, Oregon Secretary of State

That being said, economic estimates on tribal communities are difficult, due to the lack of comprehensive data collection and reporting noted above. However, the Federal Reserve Bank of Minneapolis has collected data on labor market conditions for Native American peoples that provides big picture insights into the economy of tribal people in the United States. While employment is consistently lower and unemployment higher in AIANs than all individuals in United States, the last ten years show positive trends for Native Americans. From 2014 to 2023, employment has increased 2.2% and unemployment decreased by 5.9%.²⁶ Beyond employment, Southern Oklahoma State University notes that in recent years, Native American communities have attained better access to education and improved infrastructure.²⁷ Furthermore, in 2022, billions of dollars were invested in grants and programs to improve tribal access to broadband.²⁸ Overall, AIAN people in the United States have seen their economic conditions improve substantially in the past decade.

“The CTUIR tribe is directly or indirectly responsible for around 11% of the jobs in the county”²⁹

Table 8: Households that have Broadband

Geography	Households that have Broadband
CTUIR Reservation	72.5%
United States	78.1%
All Reservations	58.2%

Source: Federal Reserve Bank of Minnesota, Reservation Profiles, 2013-2017 American Community Survey

Employment and Enterprises

Similar to the case of demographic data, there are gaps in tribal business data, with no comprehensive data on tribally owned enterprises.³⁰ It is also important to note that the creation of tribally owned businesses can provide economic benefits to both AIAN and non-AIAN residents in the Reservation alike. However, due to the unique set of barriers and challenges that tribal business owners face, such as access to sufficient financing, it can be

²⁶ Federal Reserve Bank of Minnesota, Native American Labor Market Dashboard, <https://www.minneapolisfed.org/indiancountry/resources/native-american-labor-market-dashboard>.

²⁷ Southeastern Oklahoma State University, *Improving Economic Development for Tribes*, <https://online.se.edu/articles/mba/improving-economic-development-for-tribes.aspx>, accessed March 3, 2023.

²⁸ Ibid.

²⁹ Antonio Sierra, “Local economy gets mixed grade at Chamber luncheon”, East Oregonian, 2018 https://www.eastoregonian.com/news/local/local-economy-gets-mixed-grade-at-chamber-luncheon/article_7a0bad0d-1087-5f5a-b04e-43ad0b4ee2f7.html

³⁰ M. Gregg, C. Lozar, R. Nunn, “An urgent priority: Accurate and timely Indian Country data”, Federal Reserve Bank of Minneapolis, 2022 <https://www.minneapolisfed.org/article/2022/an-urgent-priority-accurate-and-timely-indian-country-data>

difficult to get enterprises up and running and generating revenue.³¹ According to research carried out by the Center for Indian Country Development, 70% of all non-gaming tribal enterprises are located away from reservations, and the overall number of these enterprises has steadily grown over the last 25 years.

“In the USA, 70% of all non-gaming tribal enterprises are located away from reservations,”

Tables 9 and 10 show several employment metrics for the CTUIR Reservation and compares these metrics to the US and all-reservation averages. The civilian employment-population ratio, which measures the labor force that is employed at the moment against the working-age population of a region, is only slightly

lower for the CTUIR Reservation than for the United States and is in fact higher than the rate for all reservations. In terms of labor force participation, the Reservation lags behind the US, but marginally outperforms the rate for all Reservations. Unemployment rates in the CTUIR Reservation are slightly above the national average but fall below the average for all reservations. The Reservation also saw an increase of more than 3% in people working from home post-COVID from 2019 to 2021, compared to the County's lower increase of about 2%.

Table 9: Employment for CTUIR Reservation, United States, and All Reservations

Geography	Civilian Employment-Population Ratio	Civilian Labor Force Participation Rate	Civilian Unemployment Rate
CTUIR Reservation	54.9%	59.7%	8.1%
United States	59.1%	63.3%	6.5%
All Reservations	47.6%	54.4%	12.6%

Source: Federal Reserve Bank of Minnesota, Reservation Profiles, 2013-2017 American Community Survey

Table 10: Percent of Workers Working from Home in Reservation Census Tracts, Oregon, and the US

Region	Workers 16 and over	2021 Percent Working from Home	% Change from 2019
CTUIR Reservation	1,243	6.5%	3.4%
Umatilla County	32,678	4.8%	1.9%
Oregon	2.0M	12.5%	5.5%
US	153.6M	9.0%	3.8%

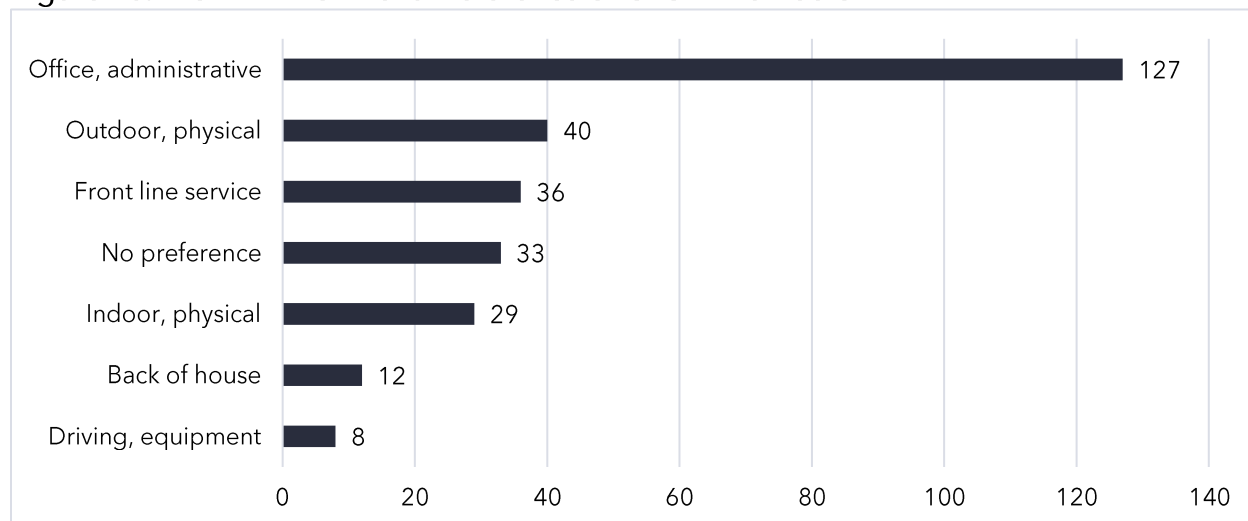
Source: Census American Community Survey, 5-Year Estimates, 2021

In a 2018 survey carried out by the CTUIR’s Human Resources Consortium, tribal members were asked to share their employment status, as well as their preferences and future career plans. Figures 18 and 19 highlight some of the employment preferences for CTUIR members. The majority of respondents stated that they preferred office and administrative work, with outdoor/physical labor and front-line service as the second and third highest preferences, respectively. Most CTUIR members surveyed also stated that they would earn a certification

³¹ Susan Woodrow, “Growing Economies in Indian Country: Taking Stock of Progress and Partnerships”, Board of Governors of the Federal Reserve System, 2012
<https://www.federalreserve.gov/newsevents/conferences/GEIC-white-paper-20120501.pdf>

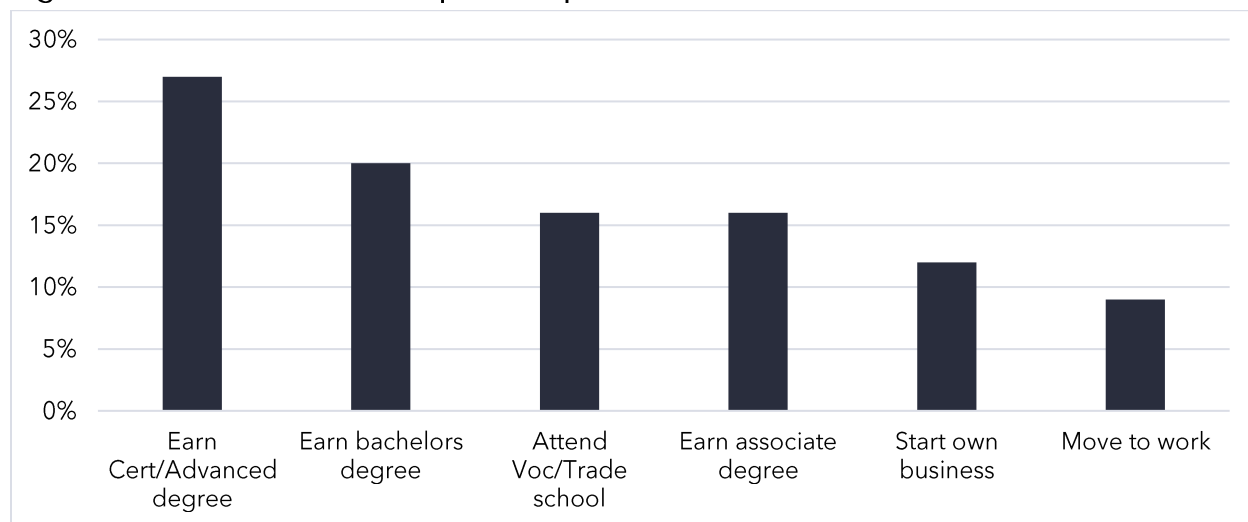
or an advanced degree as their preferred method of professional development. Others also highlighted obtaining a bachelor's degree or attending a vocational or trade school.

Figure 18: Work Environment Preference of CTUIR Members



Source: 2018 CTUIR Employment Survey, Human Resources Consortium

Figure 19: Professional Development Options CTUIR Members Would Pursue



Source: 2018 CTUIR Employment Survey, Human Resources Consortium

It is also important to consider the industry context of the larger area in which the tribe is situated. Table 11 shows employment by industry in the CTUIR Reservation and each industry's Location Quotient (LQ). The LQ is a ratio that compares the concentration of a specific industry's employment in a particular area to the national level. It provides a metric for evaluating the prevalence of jobs in a region for a given industry, relative to the same industry across the entire US. For instance, an LQ of 1 for a specific industry in a region indicates that the proportion of employment in that sector is similar to that of the US as a whole. If the LQ is greater than 1, then the number of jobs in that industry in the region is

higher than at the national level, and vice versa. Although, given the sparseness of data points, some LQs might not be representative of the employment condition in the area and the comparative advantages the county possesses.

As the table shows, most Reservation jobs are classified under public administration. This industry classification includes jobs in federal, state, and local government agencies. The CTUIR itself is one of the top employers in this category. The other top sectors in the CTUIR Reservation are health care and educational services. Employers in these categories include Yellowhawk Tribal Health Center and Umatilla Indian Social Services. Jobs in the administration, support and waste management sectors have also had a noteworthy level of growth since 2010, with most other sectors in the reservation trending upward as well. While at the county level, the top three industries by employment are health care, agriculture, and retail trade.

Table 11: Employment by Industry on the CTUIR Reservation

Industry	2022 Employment	% Change Since 2010	Location Quotient
Public Administration	216	13.7%	3.35
Health Care/Social Assistance	172	43.3%	0.90
Educational Services	157	46.7%	1.32
Arts/Entertainment/Recreation	112	115.4%	4.72
Retail Trade	95	55.7%	0.67
Construction	80	56.9%	0.86
Accommodation/Food Services	79	276.2%	0.92
Agriculture/Forestry/Fishing	74	124.2%	4.67
Admin/Support/Waste Management	73	1,116.7%	1.45
Transportation/Warehousing	63	61.5%	0.87
Manufacturing	55	96.4%	0.44
Other Services (Excluding Public)	36	24.1%	0.57
Finance/Insurance	33	43.5%	0.52
Professional/Scientific/Tech	30	130.8%	0.29
Wholesale Trade	21	600.0%	0.64
Real Estate/Rental/Leasing	19	90.0%	0.70
Information	4	(78.9%)	0.16
Utilities	2	(50.0%)	0.25
Mining/Quarrying/Oil & Gas	0	0.0%	0.00
Management of Companies	0	0.0%	0.00
Total	1,321	63.3%	-

Source: Points Consulting, 2022 using Esri Business Analyst

Table 12: Umatilla County Employment by Industry

Industry	2021 Employment	% Change 2010	% Change 2032	LQ
Health Care and Social Assistance	16,904	16.4%	21.4%	0.81
Agriculture, Forestry, Fishing and Hunting	14,102	27.7%	15.0%	6.00
Retail Trade	13,964	13.8%	9.3%	1.24
Accommodation and Food Services	12,404	17.0%	30.4%	0.85

Manufacturing	12,151	(6.3%)	(27.9%)	0.80
Public Administration	11,358	(13.4%)	(1.2%)	1.80
Transportation and Warehousing	9,325	19.1%	44.2%	1.62
Educational Services	8,206	8.9%	9.1%	1.04
Construction	5,490	38.1%	16.8%	1.23
Wholesale Trade	3,540	22.9%	24.9%	1.27
Other Services	3,053	3.2%	(29.7%)	0.87
Admin. and Support and Waste Mgmt. and Remediation Services.	3,049	(52.4%)	32.0%	1.05
Professional, Scientific, and Technical Services	2,803	(19.5%)	5.1%	0.35
Information	2,195	144.9%	75.1%	0.79
Finance and Insurance	1,985	(8.5%)	(26.6%)	0.40
Utilities	960	14.0%	39.4%	0.70
Real Estate and Rental and Leasing	879	2.6%	37.4%	0.25
Arts, Entertainment, and Recreation	769	6.8%	(22.8%)	1.11
Mgmt. of Companies and Enterprises	315	62.5%	(68.2%)	0.00
Mining, Quarrying, and Oil and Gas Extraction	136	3.6%	60.7%	0.00
Total	123,588	7.1%	12.7%	--

Source: Data Tactical Group

Table 13: Umatilla County Employment by Occupation

Occupation	2021 Avg Employment	% Change 2018
Service-providing	16,399	2.6%
Goods-producing	7,721	(3.3%)
Trade, transportation, and utilities	6,753	6.4%
Education and health services	3,970	5.1%
Natural resources and mining	3,455	1.8%
Manufacturing	3,038	(11.1%)
Leisure and hospitality	2,409	(6.6%)
Professional and business services	1,272	(9.3%)
Construction	1,229	4.6%
Other services	752	(25.8%)
Financial activities	687	(1.3%)
Information	531	203.4%
Unclassified	24	1,100.0%
Total, all occupations	24,120	0.6%

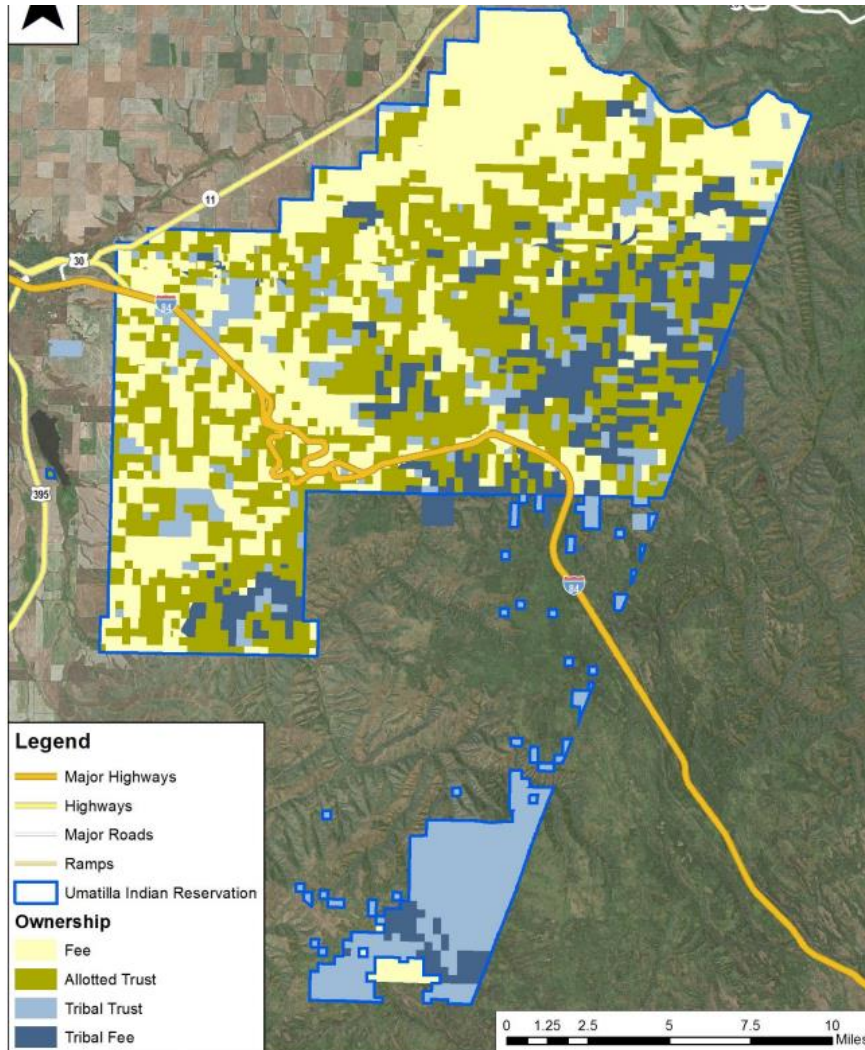
Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages

Land Ownership Patterns

Land ownership is of particular importance when an individual small business or larger business organization wishes to establish themselves within the Reservation. Tribal land has been fractionated due to allotment by the federal government. In 1996, a class-action lawsuit, known as *Cobell v. Salazar*, was brought against the US Department of Interior and the Department of the Treasury for mismanagement of Indian trust funds. The case finally reached a settlement in 2009, resulting in the *Cobell* Settlement providing a \$1.9 billion Trust Land Consolidation Fund, followed by the Land Buy-Back Program in 2012. The program is funded by the settlement to provide buy-back offers to allotment landowners at a fair market

rate. The program is voluntary for allotment landowners, and once buy-back offers are accepted the land will be consolidated to the Reservation. The program was a tremendous opportunity for CTUIR as it is ranked the 28th most fractionated reservation in the country.³² In fact, the program resulted in over 20,000 acres being consolidated to the Reservation in 2015, 2018, and 2021.

Figure 20: Landownership Map within the CTUIR



Source: Pacific Northwest Section Society for Range Management Tour Packet, 2019

within the Reservation is under Tribal trust land, which may be subjected to oversight from the Bureau of Indian Affairs (BIA).

Consolidated land can be used in many ways, such as for housing developments, community centers, business developments, or for cultural or environmental preservation. That is, when the land is in Trust by the Tribe, however if the Tribe is a part of the fractionation, it can be limiting for developments and usability. The CTUIR is in the midst of reclaiming parts of their original territory. In some cases, the land acquired will be intended for initial wildlife and environmental conservation efforts. As shown in Figure 20, the Reservation is split amongst four types of ownership: fee simple, allotted trust, tribal trust, and tribal fee. Much of the current commercial and industrial space

³² Matt Johnson, "Land Buyback Program Returns to CTUIR," <https://ctuir.org/news/land-buy-back-program-for-tribal-nations/>.

Regional Highlights

Key Industry Clusters

Through conversations with the Strategy Committee, the project team compiled a short list of industry clusters which could help facilitate economic prosperity and resiliency over the next 5 years. Some of the opportunities incumbent within these industries are addressed in more detail in the following narrative:

- Healthcare
- Educational Services
- Arts/Entertainment & Recreation
- Agriculture

Healthcare

Healthcare is the second largest industry within the CTUIR and has increased 43% within the last 12 years due to the development and expansion of Yellowhawk and its services³³. It is to be expected that the aging population of CTUIR will contribute to increasing demand in the coming years. In addition to expanding Yellowhawk, additional outpatient centers could also be added to the healthcare cluster on the Reservation. This industry serves as a primary source of employment growth for the Tribe. The growth of the industry will eventually require new development of offices, clinics, and homes for future staff and providers to serve UIR members.

Table 14: Healthcare & Social Assistance Employment Trends

Industry Sector	CTUIR
Employment	172
Job Growth (2010-2022)	52
% Job Growth (2010-2022)	43.3%

Source: Points Consulting, 2022 using Esri Business Analyst

Educational Services

Although education services rank third for CTUIR industry employment, with a 47% employment increase since 2010, there is a magnitude of current efforts, programs, partnerships, and opportunities for current and future generations to make use of for future workforce and careers. The following list, but not exhaustive, is current education facilities and programs CTUIR offers:

- Nixyáawii Community school grades 9-12
- Cay-Uma-Wa Head Start for ages 3 through 5
- "Think Big Space"-
- Imatalamfaamí Sínwit - CTUIR Language Program
- After School Program for grades K-3

³³ YellowHawk. "Community Report - Yellowhawk." Yellowhawk Community Report 2020/2021, 2021. https://yellowhawk.org/wp-content/uploads/2022/07/Yellowhawk_CommRept-20-21-FINAL-website.pdf

- Higher Education & Vocational Training preparedness and financial information

Recent legislative and development projects for tribes and CTUIR have provided an increase of prospects for students and members to pursue higher education to start or advance their careers. The expansion of broadband on the Reservation is one example of development for members to utilize the options for remote learning from a number of local and regional community and state colleges and universities. This allows current and future students, and workers to advance from entry level positions to mid or higher-level positions. The Oregon Legislature, in 2022, created the Oregon Tribal Student Grant which provides financial assistance to enrolled students of one of the nine federally recognized tribes in Oregon. The funding is primarily intended for undergraduate and graduates to attend school part-time. Many UIR students have already taken advantage of this grant and is encouraging for other members to start or finish their degrees.

Educational services specific to current workforce development can be found in two primary resources on the Reservation, however the resources are not limited to only two.

NCFS

The Nixyáawii Community Financial Services (NCFS) business development services host a plethora of assistance, workshops, and trainings for UIR members and community at minimal costs. The following is an overview of provided services and amenities from the NCFS business development team:

- Technical Assistance Services
 - Access to capital
 - Digital marketing (e.g., website creation, social media guide, search engine optimization)
 - Brand & Marketing Strategies
 - Business Plan creation
 - Business Promotion
 - Classes and workshops
 - Business Coaching - one-on-one
 - Reference library (i.e., start-up guides, videos, books, etc.)
 - Office equipment usage
- Financial Coaching
 - Budgeting
 - Financial planning
 - Debt management

All-encompassing financial education services are available for youth and adult clients, to review budgeting, planning, business credit, savings, etc. The availability of entrepreneurial and business ownership services for CTUIR is a strong asset for current and upcoming businesses to secure their finances, understanding and confidence to establish themselves in the community. The support and development of the EBC will also increase the number of interested and potential business development on the Reservation.

T.E.R.O

The Tribal Employment Rights Office (TERO) was established to prevent employment related discrimination against American Indians and to maximize utilization of Indian workers in all employment opportunities in its jurisdiction. Additionally, TERO code is intended to give preference in employment and training to American Indians and to ensure the Indian workforce in TERO jurisdiction are equipped to enter the workforce and maintain employment of their choosing. All construction contractors that work to build in Coyote Business Park and other development on the CTUIR must comply with TERO code to promote Native American employment. The code applies to all contractors who perform construction work in excess of \$25,000. Contractors are also required to sign compliance agreements, which include Native American hiring goals and on-the-job training hours, if applicable.

One of TERO's duties is to review on-the-job training hours for tribal apprenticeship programs as well. Review and monitoring of training will help ensure on-the-job training takes place, thus ensuring tribal members become skilled to stay employed. Materials that TERO offers to assist contractors include a list of qualified Native American referrals of various trades and varying skill levels. In compliance with TERO code, employers will give preference to Indian Owned Businesses when awarding contracts or subcontracts. Services and programs offered by TERO include, but not limited to:

- Conduct trainings, such as a CAT simulator at the Preparedness Building, to be able to operate heavy machinery.
- Offering pre-apprenticeship programs, such as pre-apprenticeship construction training or pre-apprenticeship carpentry training.
- Assisting contractors by providing qualified Native American referrals.
- Offering a directory of Certified Indian Owned Businesses.
- Offering workshops for contractors to become TERO certified as Indian Owned Businesses.

Planning and project studies are the first steps for economic development. When the time comes to construct or update facilities, having certified and locally available workers locally is crucial to project completions, while providing employment opportunities for the workers.

Arts/Entertainment, Recreation & Tourism

Whether via statistical agencies or industry associations, national level industry research is often conducted based on the North American Industrial Classification System (NAICS). The closest approximate industries to Wildhorse Resort and Casino are NAICS 71329: Lotteries & Native American Casinos and NAICS 72112: Casino Hotels. The key differences between these two industries include that Casino Hotels are engaged in short-term lodging with hotels on the premises and that Lotteries & Native American Casinos include the lottery side of gaming. While the Lotteries & Native American Casinos industry has grown faster than the Casino Hotels industry, both are projected to grow in the future.

A unique feature of these industries is the high competition and high barriers to entry. For Casino Hotels specifically, there is a restriction on the number of operators and government regulation. Combined with the restrictions and government regulation, high start-up costs deter new casinos from entering the market. If a small- to medium-sized hotel were to enter the market area the casino would continue to do well. The one notable draw-back to the Casino industry is that spending at Casinos is cyclical; in other words, Casinos suffer reduced business at times of economic downturn. For this reason, it is particularly important for management to continue diversifying the entertainment options available at the Casino. Currently, Wildhorse Resort & Casino (WRC) offers many different services far beyond the traditional hotel, such as event space, dining, golf, the adjacent RV park, and the casino.

WRC currently employs over 600 staff members, including multiple employment opportunities in a variety of departments such as Gaming, Food and Beverage, Hotel, Administration, Security, Finances, to name a few. The facility also provides staff with insurance, health, transportation, sick and holiday pay benefits and much more. Employment growth and development will continue to grow for this industry for CTUIR and maintain a primary revenue source for the Tribe.

Table 15: Key National Trends for the Lotteries & Native American Casinos and Casino Hotels Industries

Factor	Lotteries & Native American Casinos	Casino Hotels
Annual Revenue Growth Rate (5-Yr)	30.9%	-1.2%
National Annual Revenue	\$169.6 Billion	\$80.9 Billion
Average % of Expenses toward Wages	6.7%	27.9%
Average Profit Margin in 2021	26.6%	49.7%
Life Cycle Stage	Mature	Mature
Dependence on Disposable Income	Medium	Medium
Capital Intensity	High	Medium
Barriers to Entry	High	High
Competition Level	High	High

Source: IBISWorld: 71329 "Lotteries & Native American Casinos in the US" & 72112 "Casino Hotels in the US"

Unique to the Reservation, County, and the State of Oregon is the Tamástslíkt Cultural Institute. The museum not only showcases the point of view of the Tribe during the westward expansion of the Oregon Trail, but is also a research institute, venue for the arts, theatre, dinner and many other gathering opportunities. Many of the events hosted are free and open to the public. There are also opportunities to host events, at a low cost, during peak seasons of tourism and conferences. Further coordination for potential events and development for Tamástslíkt and CEDS Committee to assess are highlighted in [Strategic Direction & Action Plan chapter](#).

Recreation, especially sports, is a high-traffic and supported industry on the Reservation. The annual Basketball Against Alcohol & Drugs (BAAD) tournament is one example that, prior to COVID, had run for 32 consecutive years and brought over 600 youth to compete in the

weeklong tournament.³⁴ CTUIR members, affiliated Tribes, and basketball fans from all over also attend the tournament, bringing in revenue to be spent on the Reservation. The Nixyáawii Community School provides students with a list of sporting options and upgraded gymnasiums for Fall/Winter sports. However, locations to train outside of the gymnasium, and host events are spread out throughout the county.

Agriculture

Agriculture is an essential industry for the tribe as it has many current and future potential uses for CTUIR, despite the industry ranking 8th for employment. The DECD manages agriculture through the Tribal Farm Enterprise (TFE). TFE is a key part of the CTUIR's agriculture industry. The TFE has diversified its crops and income streams by farming for individuals, tribally owned land, and leased land from the Bureau of Indian Affairs (BIA). The diversification has caused farming to become a stable enterprise for the CTUIR. Tables 16 and 17 break down the acres managed by the TFE.


Table 16: Tribal Farm Enterprise Acres by Type

	Tribal Farm	BIA Allotments	Other Fee Owners	Total
Crop	1,934	1,798	272	4,004
Fallow	2,258	1,467	177	3,902
CRP	2,531	2,112	0	4,643
Total	6,723	5,377	449	12,549

Source: CTUIR Economic and Community Development, Tribal Farm Enterprise

Expansion for this enterprise can be examined through assessments of niche markets, and regenerative agriculture practices, programs, or other industries associated with agriculture. One example that could be the subject of market expansion examination - is to revitalize the private Indian Country Livestock Cooperative, or Cattle Co-op, to provide the next generation of farmers learning and business management opportunities another is to do more crop rotation and consider high demand crops that have not yet been developed.

³⁴ CUJ, "CTUIR cancels 2021 Basketball Against Alcohol & Drugs (BAAD)," <https://cuj.ctuir.org/2021/02/ctuir-cancels-2021-basketball-against-alcohol-drugs-baad/>.



A second market expansion example is establishing a Reservation-based distillery or brewery. Native American brewers and distillers have paved the way in successfully turning to their history and horticulture for inspiration. To date there are several Native owned and operated brewery and distillery companies across the U.S, to name a few:

- Talking Cider PNW partnership with Heritage Distilling Company - Confederated Tribes of Chehalis Reservation
- The Rincon Reservation and 3R Brewery - Rincon Band of Luisono Indians
- Bow and Arrow Brewing Co.- Mandan, Hidatsa, Arikara Nation, Navajo/Diné
- Mad River Brewery - The Yurok Tribe
- Turtle Mountain Brewing Company - Oke Owingeh Tribe
- 7 Clans Brewing - Eastern Band of Cherokee Indians

Many of the breweries and distillers do not serve as hubs for tourism through alcohol-based businesses as one might think-Rather, they are -utilizing traditional knowledge of plant medicine to educate others about their tribe's culture. Additionally, these industries often sell fermented beverages, such as kombucha, which is one avenue to diversify the spirits industry with healthier consumption options.

A third industry, gaining traction across the country in many communities is the Food Truck industry. A recent opportunity for CTUIR, is to establish a Food Truck Park within the Coyote Business Park. Associated to the EBC and its commercial kitchen, a Food Truck Park provides multiple mobile eateries for aspiring cooks, business owners, and entrepreneurs to provide their own foods and beverages to the CTUIR. Additionally, this potential development will provide tribal members with options for healthier and culturally connected foods. DECD, its associated programs, affiliated department managing First Foods and CTUIR members can evaluate the feasibility. Support in bringing these industries to the UIR will strengthen the agriculture industry and highlight First Foods.

SWOT Analysis

S

Sovereignty
 Proximity to interstate I-84 and highway 33 - the hub of the Northwest
 Employees of the Tribe encouraged to understand and be informed on culture and cultural history
 Tribally owned businesses, paper and electronic media, healthcare center, gaming and other enterprises
 Availability of natural resources (timber, water, fish, game, horticulture)
 Water rights - increase of avenues from water right settlement
 Quarter Billion Tribal budget
 Available commercial and industrial shovel ready lots at Coyote Business Park
 Native and local financial institution - NCFS
 Installation of renewable energy systems
 Public charter school for highschoolers located on the Reservation - Nixyáawii Community School
 Established language program and accessible language dictionary
 The Tamástslikt Cultural Institute
 First Foods approach - connect to the tribes' Creation Story
 Community pride
 Communication between department leaders
 Professional relationships between local, regional, State, and higher education entities and organizations
 Education for youth and students is culturally significant

W

Lack of communication between internal processes specifically committees, commissions, and the Board of Trustees
 Checkboard landownership within Reservation
 Limited supply and use of clean water
 Lack of additional revenue sources outside of gaming and federal funding
 No formal workforce development organization
 Revolving door of employee retention
 Lowered attraction for youth to return to Reservation for work/career opportunities
 Acknowledge the challenge of tribal police force that is largely unknown to the community and non-natives
 Limited quantity of renewable energy resources and infrastructure
 No local full-service grocery store
 Decline in blood quantum's
 Shortage of mental health services
 Fractional remote workforce opportunities
 Limited understandings on how to own and operate a business
 Time and cultural background education for students lost during COVID pandemic
 Education for K-8 only available off the Reservation

O

Expand sustainable agriculture production such as beef and wheat
 Market rate rental housing available both within and outside of the Reservation
 Leverage inner market for increase of tourism related to CTUIR culture and history
 Energy Department centralization
 Pursue green energy and specifically hydrogen energy funding opportunities
 Process to collect data for education pipelines
 Available opportunities for most Tribal departments and entities for summer apprenticeships - similar to current opportunity at Cayuse holdings
 Increase communication and collaboration with colleges for summer programs and internships
 Evaluate social and emotional tools for youth to feel safe
 Review new potential for communication tools/outlets and remote workforce from recent broadband expansion
 Establish a workforce development agency or director role
 Renewed focus on Indian Country from EDA and other federal agencies

T

Decline in number of Tribally enrolled members
 Frequent leadership changes among leading organizations
 Economic uncertainty and policy changes, in part due to pending state/national elections, inflation, and potential international conflicts
 Legislative oversight surrounding natural resource and conservation efforts
 Students experiencing conflict off Reservation based on cultural differences
 Limited office space for new employees and expanding departments
 Retirement of Tribal leaders and the knowledge taken with them
 Climate change and associated natural disaster risks

Economic Resiliency

“The CTUIR economy consists of diverse array of Governmental and private practices that allow the CTUIR to protect and further its Treaty rights, CTUIR member access to treaty resources, and governmental and private sector employment opportunities for CTUIR members and community members on and off the Umatilla Indian Reservation. In so doing, the economy serves the community at two scales; the economic sovereignty of the Tribe as well as opportunities for individual members to practice economic self-reliance.”

-CTUIR DNR Director

Economic resiliency refers to the ability of a regional economy to cope with hardship. According to the EDA, economic resiliency includes the following three attributes: the ability to recover quickly from a shock, the ability to withstand a shock, and the ability to avoid the shock altogether.³⁵ Many of these characteristics arise from local institutions, businesses, and neighborhoods along with coordinated region-level planning. Building economic resilience into a regional economy requires the ability to anticipate risk, evaluate how that risk can impact key economic assets, and build a responsive capacity, all activities that can be facilitated through regional CEDS planning.

Tribes include resiliency as a foundational attribute of their culture and identity. Recovery from the COVID pandemic is currently the most visible sign of resiliency in all communities. The economic shutdowns forced many to begin to adapt. One product of the pandemic was the need for better internet infrastructure to accommodate better communication and cooperation in a socially distanced world. In light of this, the CTUIR made a significant investment into broadband internet access. This is an example of a steady-state, or long-term, initiative because increased internet access will provide Tribal members with the ability to continue operating in case of another shock like the pandemic.

In 2020, the CTUIR began construction of a “Pandemic Preparedness” building with the assistance of CARES (Coronavirus Aid, Relief, and Economic Security) Act funds. This building provides a food pantry for Tribal members, a broadband “point of presence,” and a storage area for personal protection equipment, and TERO training simulator.³⁶ Originally transported to the reservation on three semi-trucks, the pre-engineered metal building retained its initial concrete footings. CARES Act funding was mandated to be spent by the end of 2020, so construction needed to be completed swiftly. The building represents a responsive initiative to assist the Tribal community in times of emergency, such as a pandemic or natural disaster. Food assistance will also be provided to income-eligible

³⁵ US Economic Development Administration, “Economic Resilience,” <https://www.eda.gov/grant-resources/comprehensive-economic-development-strategy/content/economic-resilience>.

³⁶ CUJ, “Pandemic Preparedness building on fast track,” <https://cuj.ctuir.org/2020/12/pandemic-preparedness-building-on-fast-track/>.

individuals and families who live on the UIR, and to income-eligible off-reservation households with at least one member enrolled in a federally recognized tribe.³⁷

In the future, the Pandemic Preparedness building will be available to provide shelter to community members that lose homes due to natural disasters. In fact, another example of a recent shock to the CTUIR community was the flooding of the Umatilla River in February of 2020. The flooding caused destruction of homes and land, and several families needed to be housed at the Wildhorse Resort & Casino.³⁸ The CTUIR, because of having an adopted Natural Hazard Mitigation Plan in place, was able to respond to the flood disaster declaration and received FEMA Hazard Mitigation Grant funds to purchase 15 properties under seven ownerships that were flooded. Homesites, wells and septic systems on these impacted properties were removed. Natural disasters, such as floods, drought, and wildfires are becoming more frequent and more intense as climate change continues. The CTUIR is doing its part to combat climate change with the adoption of its Strategic Energy Plan in October of 2022.³⁹ The plan will be another steady-state initiative to guide the Confederated Tribes on new energy projects for the next five years, assist in achieving energy sovereignty, and reduce greenhouse gas emissions contributing to climate change.

Communication can also be a point of emphasis for economic resilience. An excellent example of a responsive initiative is the Cay-Uma-Wa Camp Crier app, developed by Cayuse Native Solutions, because it is designed to enhance communications with and among the UIR community. App functions include emergency notifications, department updates, language lessons, council meeting notices & links, job opportunities, and a list of tribal resources.⁴⁰ The app also establishes a process for regular communication, monitoring, and updating of needs and issues which can be used after or during an incident.

Stemming from the aftermath and quick responses of the CTUIR leaders and departments during the COVID-19 pandemic, the Tribe's Public Safety Department established an Emergency Operations Plan (EMP). It depicts how the Tribe will both organize and respond to emergencies and disasters, and how the array of departments and agencies within the CTUIR will harmonize resources and activities with federal, state, local and private-sector organizations. As well as ensuring the maximization of safety of the public while minimizing property damage.

"Appreciate the thoughtful and deliberate efforts and work being done currently. Number one is keeping it safe and clean and healthy for all of our families."

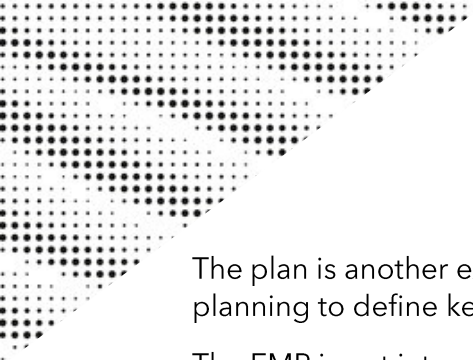
-Anonymous survey response

³⁷ Wil Phinny, "Food pantry part of 'Preparedness,'" <https://cuj.ctuir.org/2020/12/food-pantry-part-of-preparedness/>.

³⁸ Alex Castle, "Umatilla River Flooding | CTUIR Preparing for recovery as rescues continue," https://www.eastoregonian.com/news/umatilla-river-flooding-ctuir-preparing-for-recovery-as-rescues-continue/article_911e8d3c-4aaa-11ea-99ff-2bfe93f10106.html.

³⁹ AECOM, "Confederated Tribes of the Umatilla Indian Reservation, Strategic Energy Plan."

⁴⁰ CUJ, "CTUIR launches mobile app to inform UIR community," <https://cuj.ctuir.org/2022/07/ctuir-launches-mobile-app-to-inform-uir-community/>.



The plan is another example of a responsive resiliency initiative as it conducts pre-disaster planning to define key stakeholders, roles, responsibilities, and key actions.

The EMP is not intended to be used for day-to-day emergencies, which are overseen by first responders, but to be applied in unpredicted situations. Detailed and structured planning for emergencies is crucial for CTUIR community to maintain and strengthen its resiliency to many situations.

Sources of economic resiliency can come from outside of the Tribes as well. A government agency that can contribute to the CTUIR's resilience is the Federal Emergency Management Agency (FEMA). Contributions from FEMA can be steady state in nature by assisting with being prepared for shocks, or it can be responsive by assisting with personnel response and recovery from the shock. Assistance from FEMA takes the form of four kinds of grants: preparedness, hazard mitigation assistance, resilience, and emergency food and shelter.⁴¹ FEMA also has a tribes-specific strategy for assistance, which follows its traditional three goals of instilling equity as a foundation of emergency management, leading the whole of community in climate resilience, and promoting and sustaining a ready FEMA and prepared nation.

⁴¹ FEMA, "Oregon, Region 10," <https://www.fema.gov/locations/oregon>.

Strategic Direction & Action Plan

The Strategic Direction & Action Plan is the most critical aspect of a CEDS plan. It accounts for the socioeconomic, community, and external factors uncovered during the SWOT analysis and aligns those factors with specific strategies and actions that community leaders can address. These Goals and Objectives are consistent the community's vision for economic prosperity. Ideally, over the next five years, community leaders will be able to return to these Goals and Objectives in order to measure performance of the community. At its core, the Strategic Direction & Action Plan answers the two fundamental questions:

- "Where do we want to go as a community?" and
- "How are we going to get there?"

Vision Statement

"The Department of Economic and Community Development promotes the interests of members of the Umatilla Indian Reservation by creating jobs, increasing revenues, and contributing to a diversified and developed economic base, thus creating opportunities for continued advancement of all sectors of the community."

There are two layers to the Strategic Direction & Action Plan:

- **Goals** are big-picture outcomes and intentions that provide direction based on the Vision Statement. Frequently, Goals are intangible and somewhat aspirational. They provide a structure for the more precise Objectives.
- **Strategies** fold into the Goals but are more measurable and specific. Strategies identify specific actions and tactics that can be taken to achieve the Goals.

These were the primary regional goals that were identified through the planning process:

Goals & Action Plan

- **Goal 1: Improve Workforce and Career Marketing Strategies to Increase Business and Industry**
 - Develop educational campaign for Coyote Business Park services and business opportunities to community and local area
 - Promote workforce opportunities in emerging industries including banking, finance, and economic development
 - Promote vocational job training and opportunities
 - Evaluate implementation of programs or incentives to reduce "brain drain" from current youth and next generations
- **Goal 2: Optimize Land Use for Economic and Community Development**
 - Review Coyote Business Park and Wanapa Industrial Site design standards to ensure they are easy to understand and enforce
 - Work in partnership to assess housing development needs and develop systems for facilitate private ownership of land, assets, and housing for market

- rate, mixed use, for sale, subsidized housing, and senior housing developments
- Monitor new vacancy strategies at Coyote Business Park for bringing in new tenants
 - Develop marketing and visitor pathways for non-Native traffic to patronize native-owned retail and food service businesses located on the Reservation, particularly in conjunction with existing special events in Pendleton and Umatilla County
 - Secure grant funding and donor funds for development of Emerging Business Center (EBC) and develop roadmap for building and staffing. Develop roadmap for the Food Truck Park
 - **Goal 3: Improve Community, Tourism and Philanthropic Assets**
 - Explore opportunities within the Tamástslíkt Cultural Institute to expand community collaboration and visitor-attracting events
 - Examine feasibility to enter niche industries and new markets
 - Improve foot traffic opportunities for pedestrians between Wildhorse, RV park, Tamástslíkt, and
 - Develop commercial corridor on west side of highway 331
 - Complete improvements and accessibility of trails managed by CTUIR to encourage use and promote recreation
 - **Goal 4: Support Department Collaboration and Planning**
 - Involve Tribal membership community engagement phases of planning processes
 - Develop department role succession plans in coordination with HR and other training opportunities for next generations
 - Enhance connections with Native Organizations regionally and nationally
 - Improve CTUIR visibility and connections with Native and Non-Native local, state, and federal organizations and advocacy organizations

Evaluation Framework

The Evaluation Framework component of a CEDS defines the standards by which Strategic Direction & Action Plan progress will be measured over the next five years. Each CEDS Annual Update will report progress according to these metrics. Whereas the Strategic Direction & Action Plan focuses on where the regional economy will go and how it will get there, the Evaluation Framework focuses on the key questions:

- "How are we doing?" and
- "What can we do better?"

A few points of clarification are necessary in relation to the Evaluation Framework. While some performance measures are strongly quantitative, others are more focused on development or improvement of a qualitative feature. Some performance measures are to be reviewed annually while others will require a longer duration of time to complete. The duration of performance measurement is indicated in parenthesis following each topic. Lastly, performance measures are aligned with each of the four Goals presented in the Strategic Direction & Action Plan section.

Goal 1: Improve Workforce and Marketing Strategies to Increase Business and Industry

- Develop marketing strategy for Coyote Business Park and Wanapa Industrial Site services and business opportunities to community and local area (6 months)
- Promote workforce opportunities in emerging industries such as banking, finance, and economic development (as needed)
- Promote vocational job training and opportunities (as needed)
- Evaluate implementation of programs or incentives to reduce "brain drain" from current youth and next generations (1 to 2 years)

Goal 2: Optimize Land Use for Economic and Community Development

- Review Coyote Business Park and Wanapa Industrial Site design standards to ensure they are easy to understand and enforce. (1 year)
- Work in partnership to assess housing development needs and develop systems to facilitate private ownership of land, assets, business, and housing for market rate, mixed use, for sale, subsidized housing, and senior housing developments (3 years)
- Develop new and existing business and industry opportunities that promote private investment at Coyote Business Park (1-2 years)
- Develop marketing and visitor pathways for non-Native traffic to frequent native-owned retail and food service businesses located on the Reservation, particularly in conjunction with existing special events in Pendleton and Umatilla County (3-4 years)
- Secure grant funding and donor funds for development of Emerging Business Center (EBC) (3 years)
- Develop roadmap for building and staffing the Emerging Business Center (EBC) and Food Truck Park (2 years)

Goal 3: Improve Community, Tourism, and Philanthropic Assets

- Explore opportunities within the Tamástslíkt Cultural Institute to expand community collaboration and visitor-attracting events (5 years)
- Examine feasibility to enter niche industries and new markets (as needed)
- Improve foot traffic opportunities for pedestrians between Wildhorse, RV park, Tamástslíkt, and developing commercial corridor on west side of highway 331 (5 years)
- Complete improvements and accessibility of trails managed by CTUIR to encourage use and promote recreation (5 years)

Goal 4: Support Department Collaboration and Planning

- Involve Tribal membership during community engagement phases of planning processes
- Develop department role succession plans in coordination with HR and other training opportunities for next generations (2 to 3 years)
- Enhance connections with Native Organizations regionally and nationally (as needed)
- Improve CTUIR visibility and connections with Native and Non-Native local, state, and federal organizations and advocacy organizations (as needed)

Implementation

The following table serves as a recommended outline for which departments and entities are to track and monitor the identified goals, actions, and timeline within the next 5 years.

Table 18: Implementation Outline of CEDS Goals & Actions

Goal	Action	Who	Timeline
1: Improve Workforce and Marketing Strategies to Increase Business and Industry	Develop marketing strategy for Coyote Business Park and Wanapa Industrial Site services and business opportunities to community and local area	DECD, NCFS	6 months to 1 year
1: Improve Workforce and Marketing Strategies to Increase Business and Industry	Promote workforce opportunities in emerging industries such as banking, finance, and economic development	DECD, Planning, Cayuse Holdings, TERO, Communications, Workforce Development Dept.	As needed
1: Improve Workforce and Marketing Strategies to Increase Business and Industry	Promote vocational job training and opportunities	DECD, TERO, Communications,	As needed

1: Improve Workforce and Marketing Strategies to Increase Business and Industry	Evaluate implementation of programs or incentives to reduce “brain drain” from current youth and next generations	DECD, Education Dept, Workforce Development Dep,	1 to 2 years
1: Improve Workforce and Marketing Strategies to Increase Business and Industry	Develop marketing strategies for Coyote Business Park services and business opportunities to community and local area	DECD	6 months to 1 year
2: Optimize Land Use for Economic and Community Development	Review Coyote Business Park and Wanapa Industrial Site design standards to ensure they are easy to understand and enforce.	DECD, Planning Dept,	1 to 2 years
2: Optimize Land Use for Economic and Community Development	Work in partnership to assess housing development needs and develop systems to facilitate private ownership of land, assets, business, and housing for market rate, mixed use, for sale, subsidized housing, and senior housing developments	DECD, TERO, Housing Dept, Planning Dept, Public Works, Finance Dept.	3 years
2: Optimize Land Use for Economic and Community Development	Develop new and existing business and industry opportunities that promote private investment at Coyote Business Park	DECD	1 to 2 years
2: Optimize Land Use for Economic and Community Development	Develop marketing and visitor pathways for non-Native traffic to frequent native-owned retail and food service businesses located on the Reservation, particularly in conjunction with existing special events in Pendleton and Umatilla	DECD, Wildhorse, Planning Dept, DNR, Tamástslíkt, Communications, City and County Officials	3 to 5 years
2: Optimize Land Use for Economic and Community Development	Secure grant funding and donor funds for development of Emerging Business Center (EBC)	DECD, NCFS, Workforce Development, Finance, Planning Dept.	3 to 4 years
2: Optimize Land Use for Economic and Community Development	Develop roadmap for building and staffing the Emerging Business Center (EBC) and Food Truck Park	DECD, Tamástslíkt, Planning,	3 to 5 years
3: Improve Community, Tourism, and Philanthropic Assets	Explore opportunities within the Tamástslíkt Cultural Institute to expand community collaboration and visitor-attracting events	DECD	5 years
3: Improve Community, Tourism, and Philanthropic Assets	Examine feasibility to enter niche industries and new markets	DECD, Planning, Wildhorse, Tamástslíkt, Public Works Dept.	As needed

3: Improve Community, Tourism, and Philanthropic Assets	Improve foot traffic opportunities for pedestrians between Wildhorse, RV park, Tamástslíkt, and developing commercial corridor on west side of highway 331 (DECD, Planning, DNR, Public Works Dept.	5 years
3: Improve Community, Tourism, and Philanthropic Assets	Complete improvements and accessibility of trails managed by CTUIR to encourage use and promote recreation	All departments,	5 years
4: Support Department Collaboration and Planning	Involve Tribal membership during community engagement phases of planning processes	All departments	As needed
4: Support Department Collaboration and Planning	Develop department role succession plans in coordination with HR and other training opportunities for next generations	All departments, NCFS, local Native Non-profits	2 to 3 years
4: Support Department Collaboration and Planning	Enhance connections with Native Organizations regionally and nationally	All departments, NCFS, local Native Non-profits	As needed
4: Support Department Collaboration and Planning	Improve CTUIR visibility and connections with Native and Non-Native local, state, and federal organizations and advocacy organizations	All departments	As needed

Appendix A: CEDS Strategy Committee

This CEDS was completed with the guidance and assistance of the following Strategy Committee members.

- Bill Tovey - Department of Economic and Community Development Director
- Monica Paradise - Business Development and Tax Project Manager
- Steven Hart - Business Building Infrastructure Specialist
- Susan Bower - Business Recruitment Specialist
- JD Tovey - Planning Director
- Julie Taylor - Children and Family Services Director
- Modesta Minthorn - Education Director
- Kaeleen McGuire - Communications Director
- Bob Fossek - Emergency Management Coordinator
- Dave Tovey - NCFS Executive Director
- Aaron Luke - Energy Projects Intern
- Donald Williams - Economic and Community Development Committee Member
- Debra Croswell - Cayuse Native Solutions President/Executive Managing Director
- Eric Quaempts - Department of Natural Resources Director
- Marcus Luke - Housing Director
- Bobbie Conner - Tamástslíkt Cultural Institute Director
- Leona Enright - Former Business Recruitment Specialist

Appendix B: Community Survey Summary

Points Consulting and the CEDS Committee conducted a community survey within the CTUIR between March and April of 2023. A total of 154 unique responses were collected both via paper and an electronic survey. Of these respondents, 54% are noted to be enrolled tribal members who live on the reservation, 27% enrolled living off the reservation, 7% either not an enrolled member nor live on or near the reservation, or another native living on the reservation. The remaining 2 to 1% of respondents were either descendants or non-native. Responses were collected through a number of channels such as an information booth during the BAAD tournaments, CampCrier app, and the CTUIR event homepage.

The survey included a mix of both fixed response questions (e.g., multiple choice, selection and scaled responses), and open-ended questions. Please note that tables that contain "Average Score" which translates textual responses into a quantitative score (e.g., Strongly Agree = 5, Agree =4, etc.). This allows the project team to compare and rank the interest levels for each concept. PC also utilized a thematic coding method to group open-ended responses into categories that are largely similar.

Survey Findings

The Community Survey received 154 qualified responses from across CTUIR. Residents, members, and employees shared strong sentiments related to economic and community development strengths and challenges.

Strengths

When asked to identify their communities' biggest strengths, numerous topics were identified including community, culture, the longhouse, youth, resiliency, the casino, sovereignty, location, education, and healthcare services.

Weaknesses

When asked to identify their communities' biggest weaknesses, residents zeroed in on topics such as housing, water, addictions, communication, drugs and alcohol, nepotism, public safety, workforce, job opportunities, wages, community mentality and childcare.

Opportunities

When asked to identify their communities' biggest strengths, numerous topics were identified including education and educational resources, business and activities expansion, local jobs and employment, green energy, increase housing, trade skills and job shadowing.

Threats

When asked to identify their communities' biggest strengths, numerous topics were identified including enrollment, drugs and alcohol, natural disasters, climate change, limited affordable housing, crime, and public safety.

Survey Responses

Figure 21: What does Tribal Economic Sovereignty mean to you?



Figure 22: Are you an enrolled member of CTUIR and/or live on the Reservation?

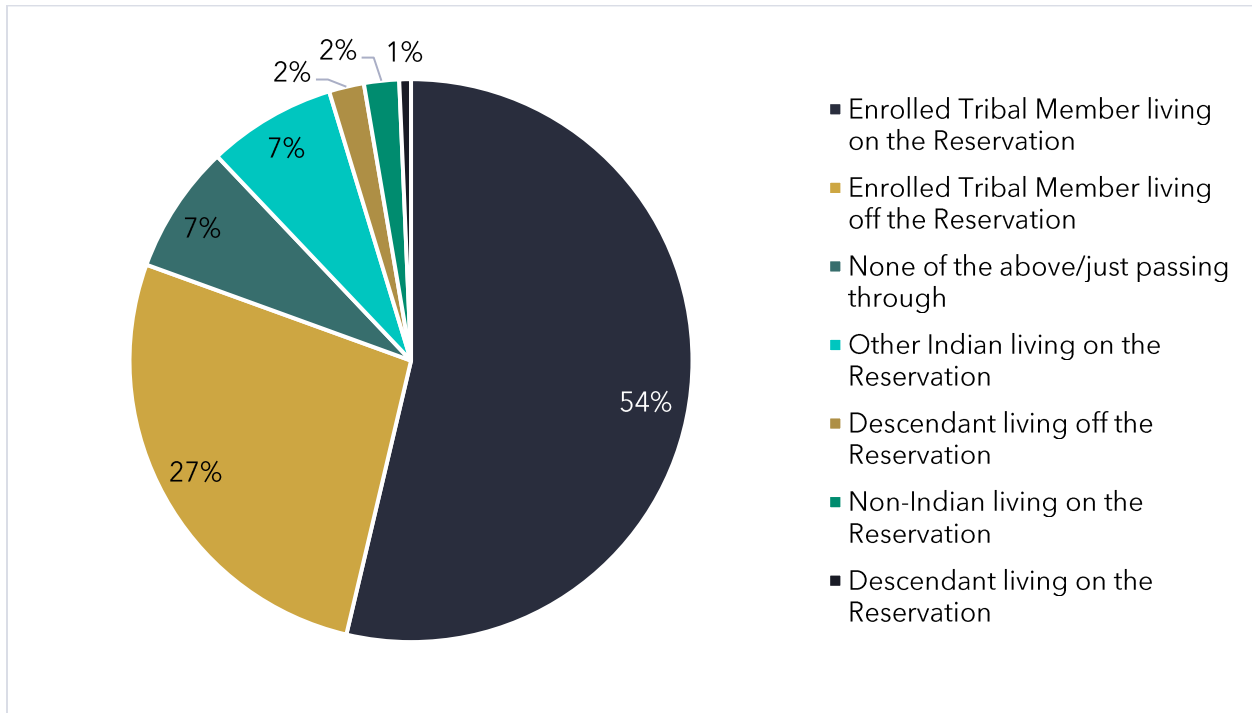


Table 19: Do you work within the CTUIR Reservation?

Choice	Response	Percent
Yes	110	79%
No	22	16%
Nonapplicable	8	6%

Figure 23: What categories best describe your work situation?

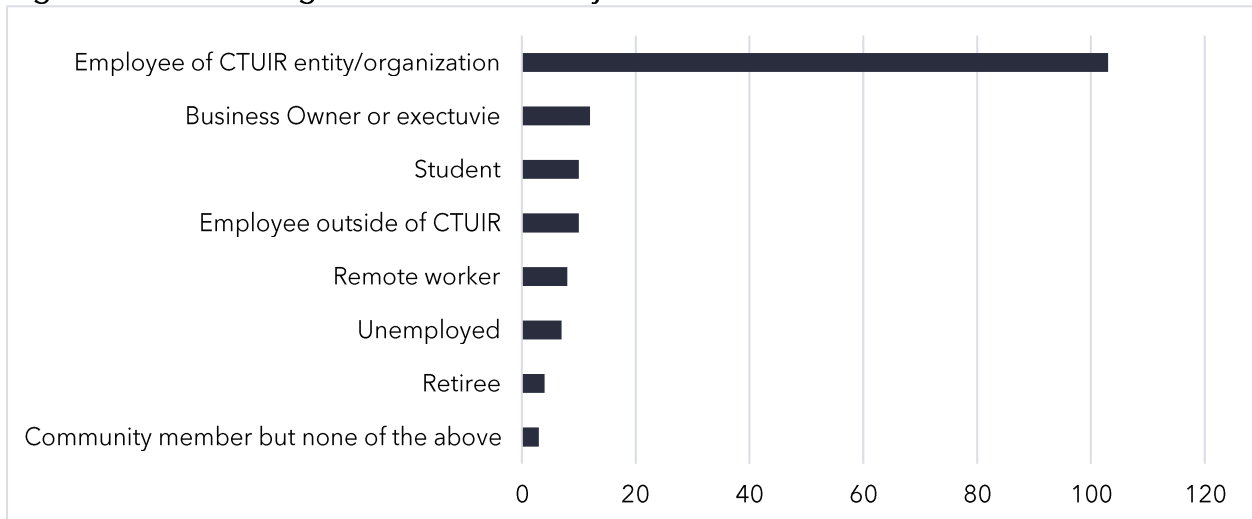


Figure 24: What type of business are you engaged in?

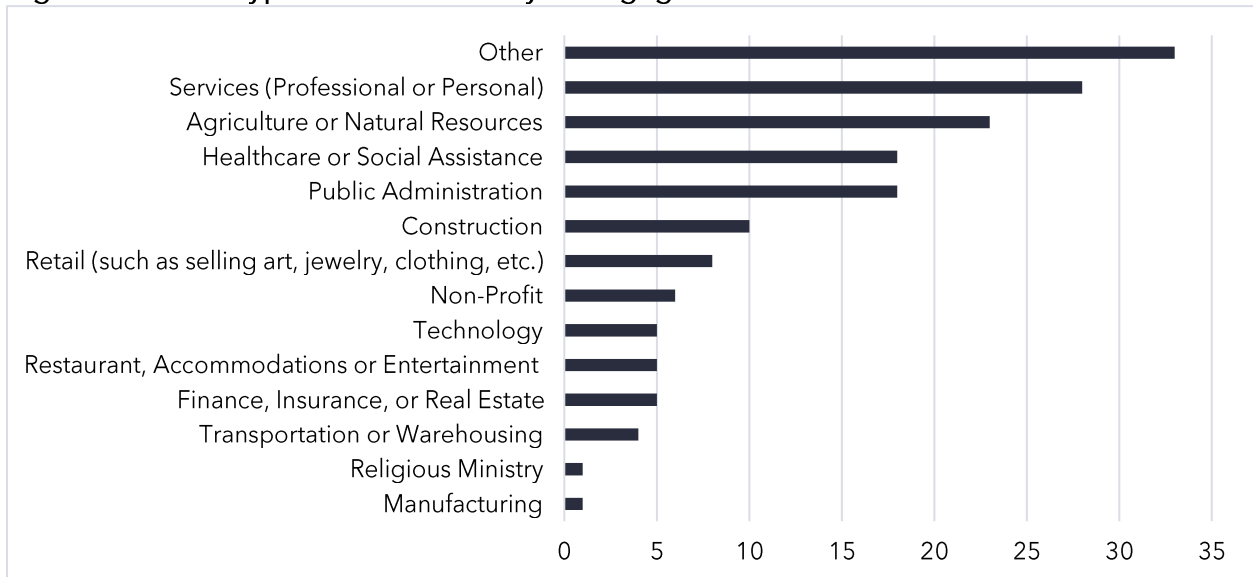


Figure 25: Coded Response: What type of business are you engaged in? (Other)

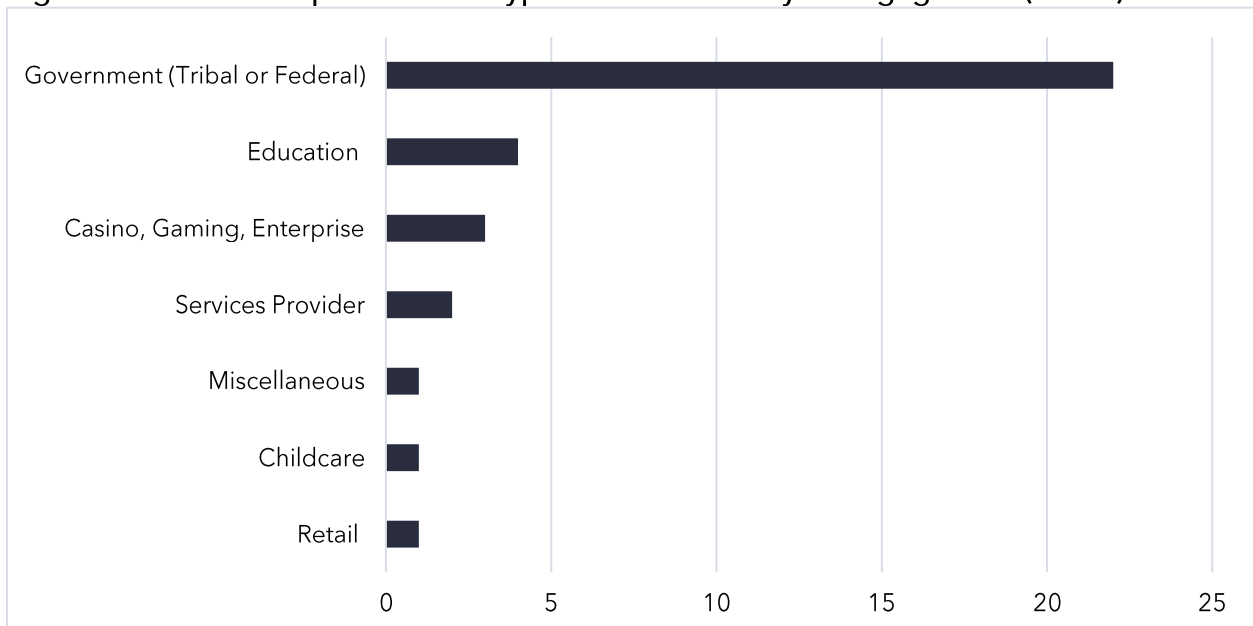


Figure 26: How satisfied are you with the following community issues in the CTUIR community?

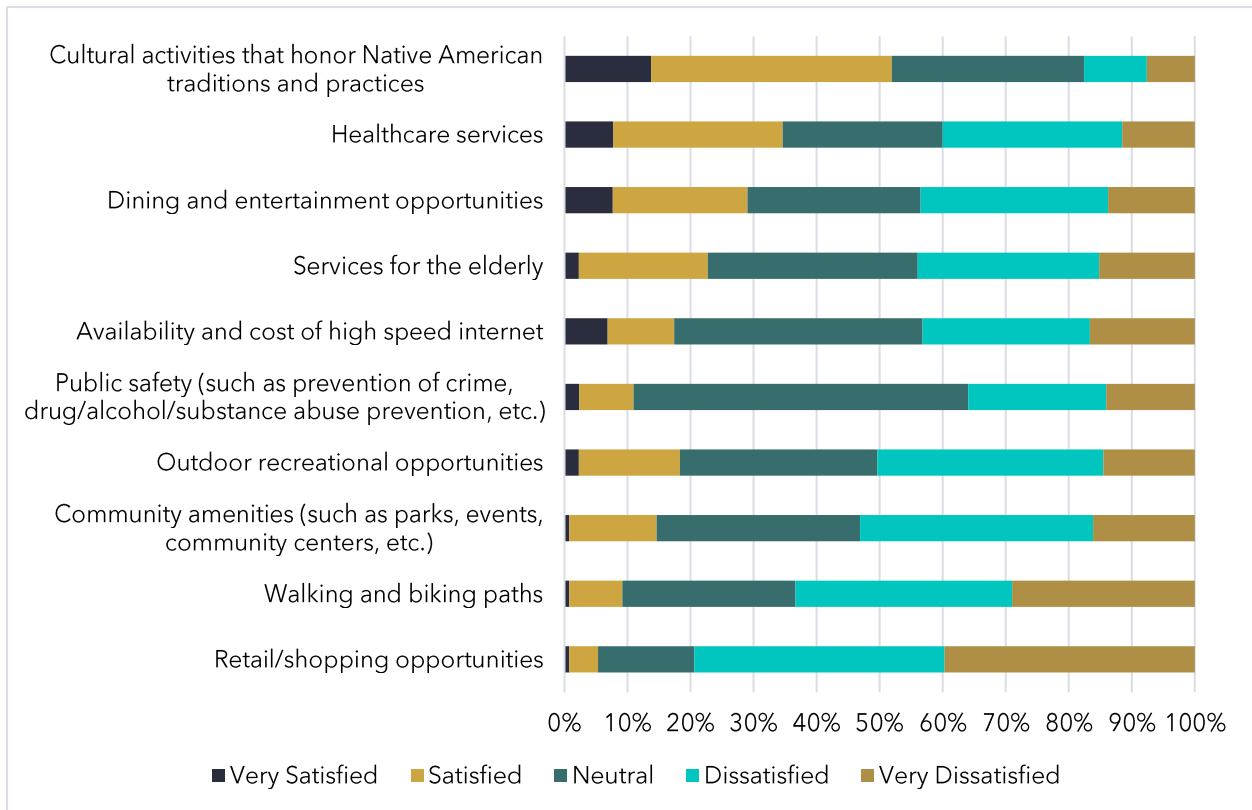


Figure 27: How satisfied are you with the following economic factors in the CTUIR community?

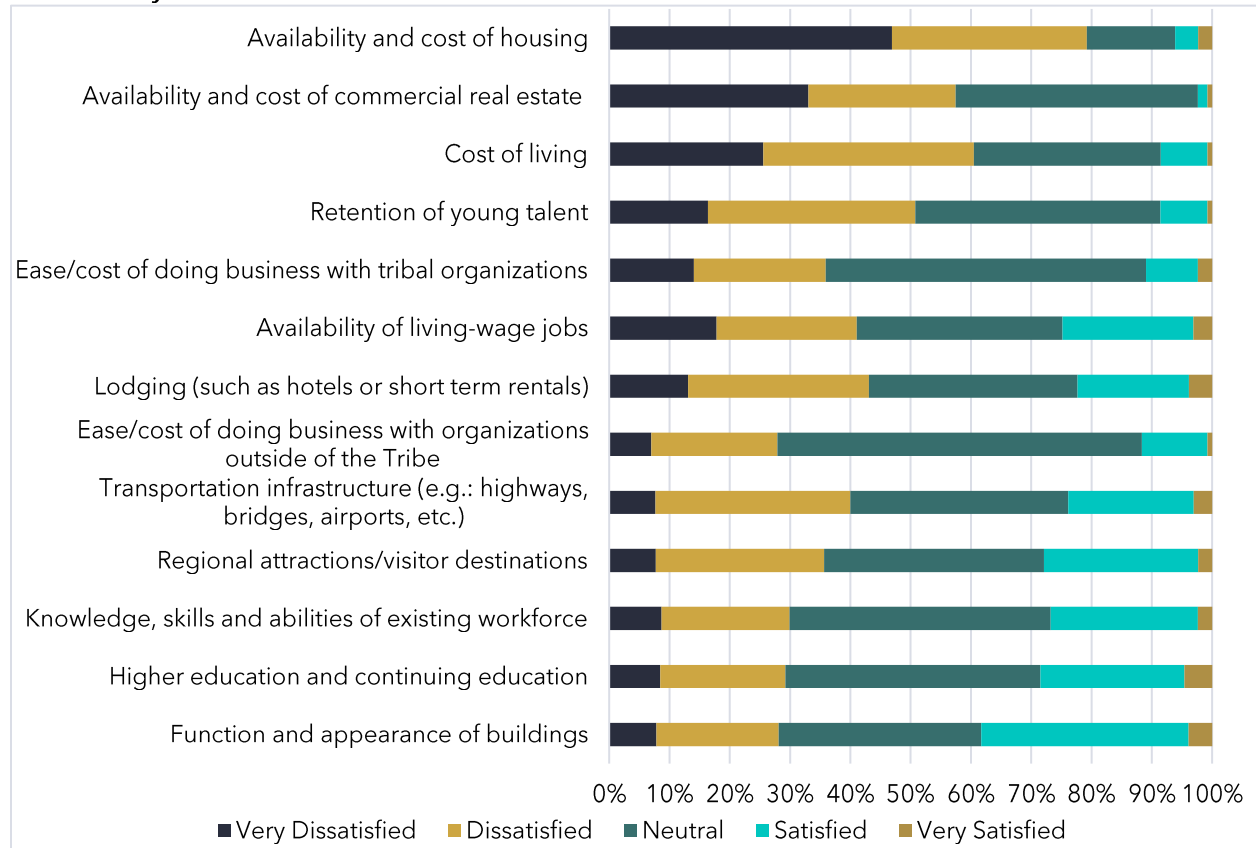


Table 20: What economic development activities is your community most in need of right now?

Category	Response	Percent
Availability of affordable housing	99	64%
Business recruitment and expansion (that is, getting new businesses to locate on the CTUIR Reservation)	71	46%
Improved access to high-speed internet	71	46%
More cultural activities and events	60	39%
Improved infrastructure (e.g.: water, electric, transportation, etc.)	58	38%
Community and strategic master planning	53	34%
Training on business and economic topics	49	32%
Increasing tourist traffic to the Reservation	46	30%
Microloans (i.e.: loans of less than \$30k)	41	27%
Business retention (that is, preventing businesses from leaving or closing)	40	26%
Availability of ready-to-use commercial real estate	40	26%
Networking for existing and upcoming businesspeople	31	20%

Business loan assistance	30	19%
Help selling products to people off the Reservation	27	18%

Figure 28: (Fill in the blank) I am _____ to recommend the CTUIR Reservation as:

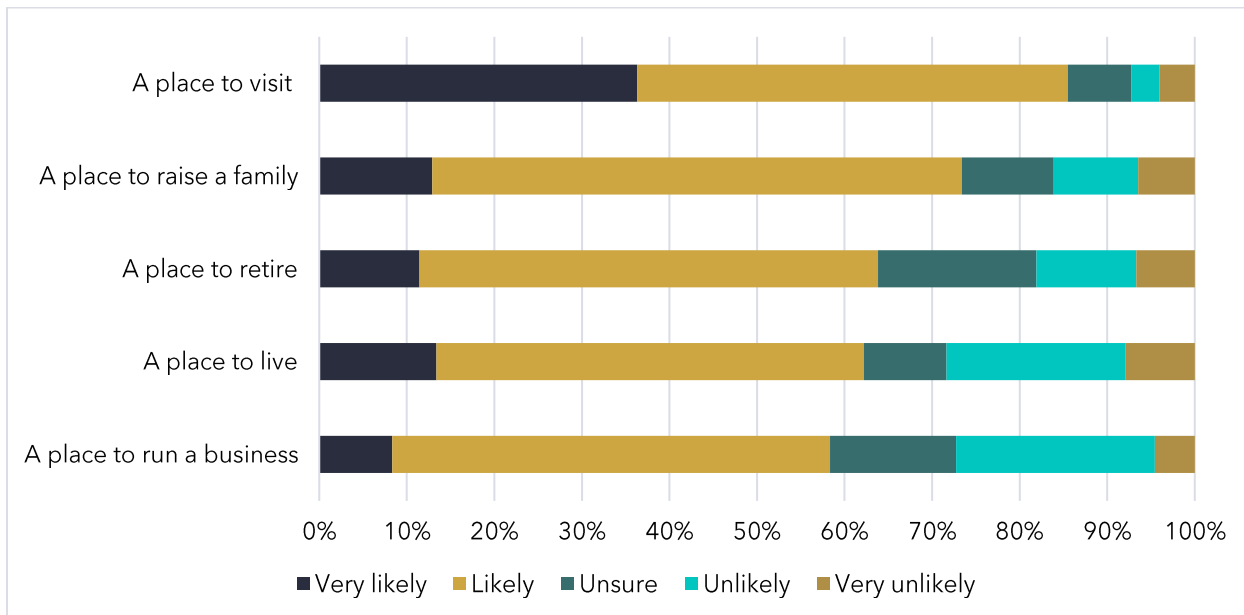


Figure 29: How well does your community meet your expectations in the following wage and employment fields?

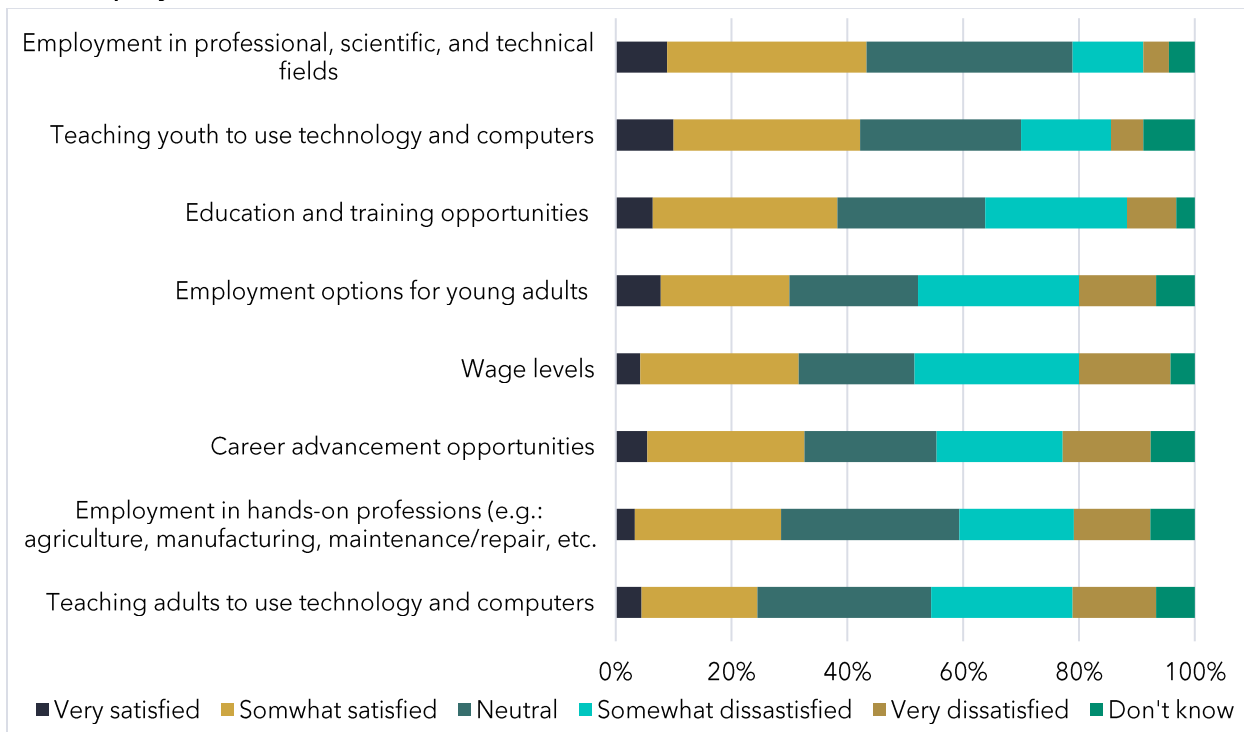


Table 21: Community resiliency describes the ability to hold up and recover from economic challenges such as the COVID pandemic. How resilient do you consider the CTUIR community to be?

Choice	Response	Percentage
Very resilient	51	41%
Somewhat resilient	35	28%
Neutral	16	13%
At risk	11	9%
Very at risk	9	7%
Don't know	1	1%

Figure 30: What are the biggest threats to the community's resiliency?

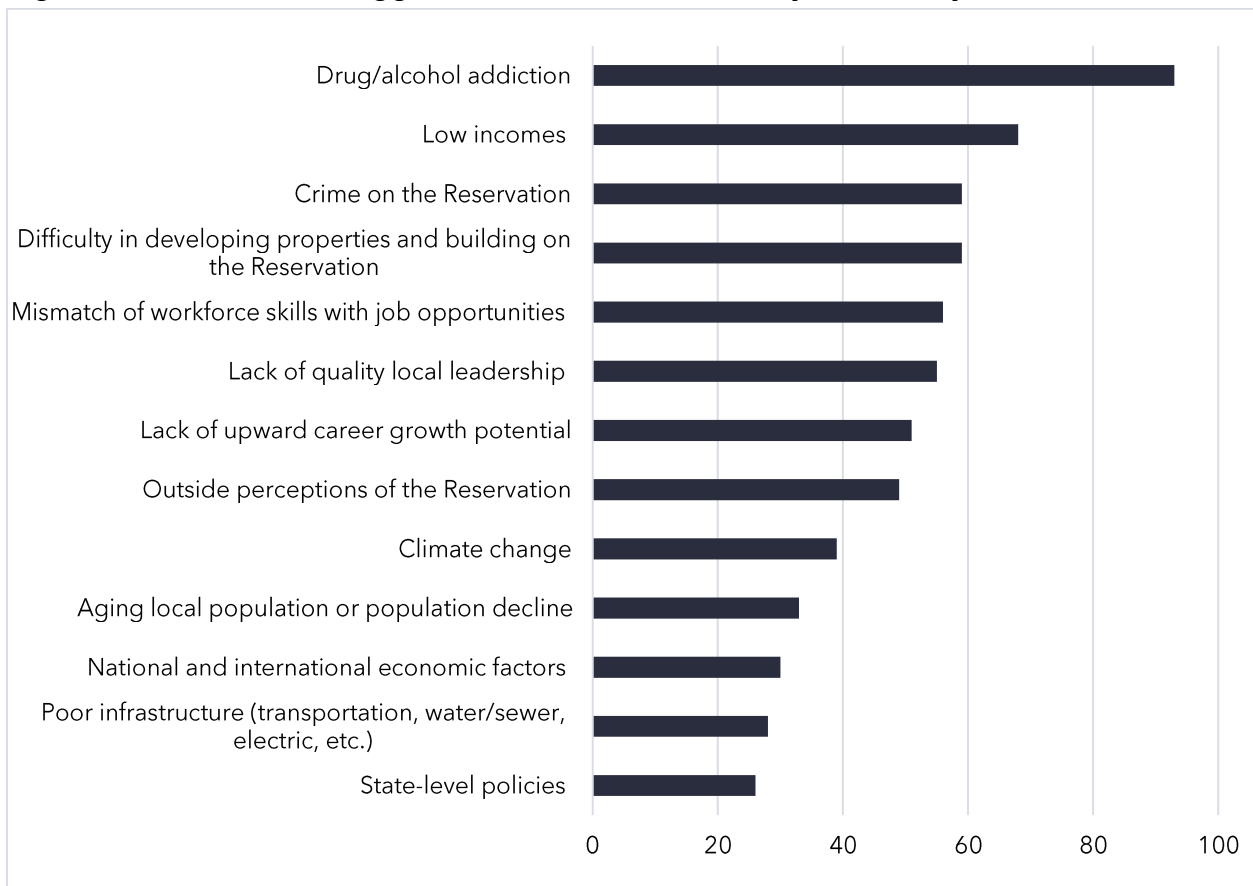


Figure 31: Coded Responses: Please list up to three of the greatest strengths of the CTUIR:

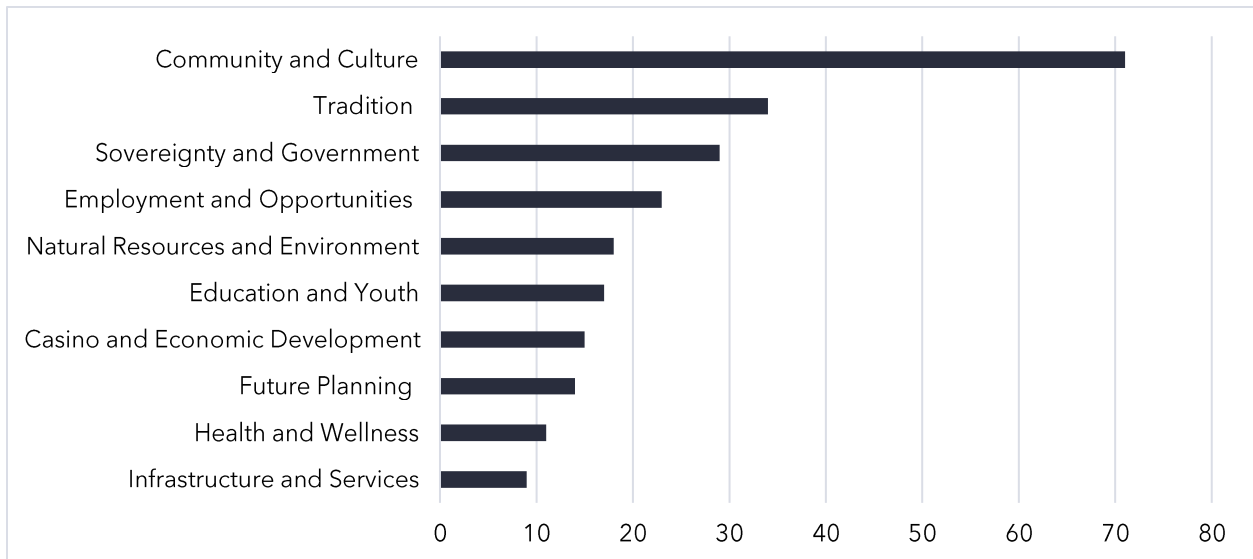


Figure 32: Coded Responses: Please list up to three of the greatest weaknesses of the CTUIR:

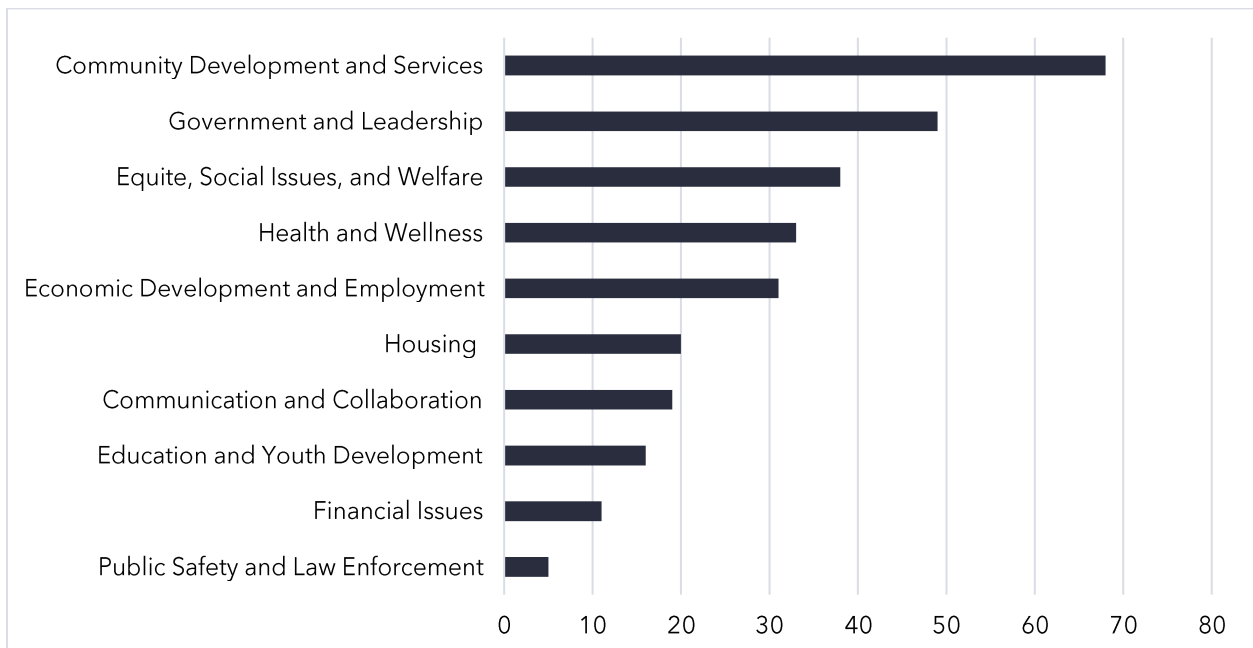


Figure 33: Coded Responses: Please list up to three of the greatest opportunities of the CTUIR:

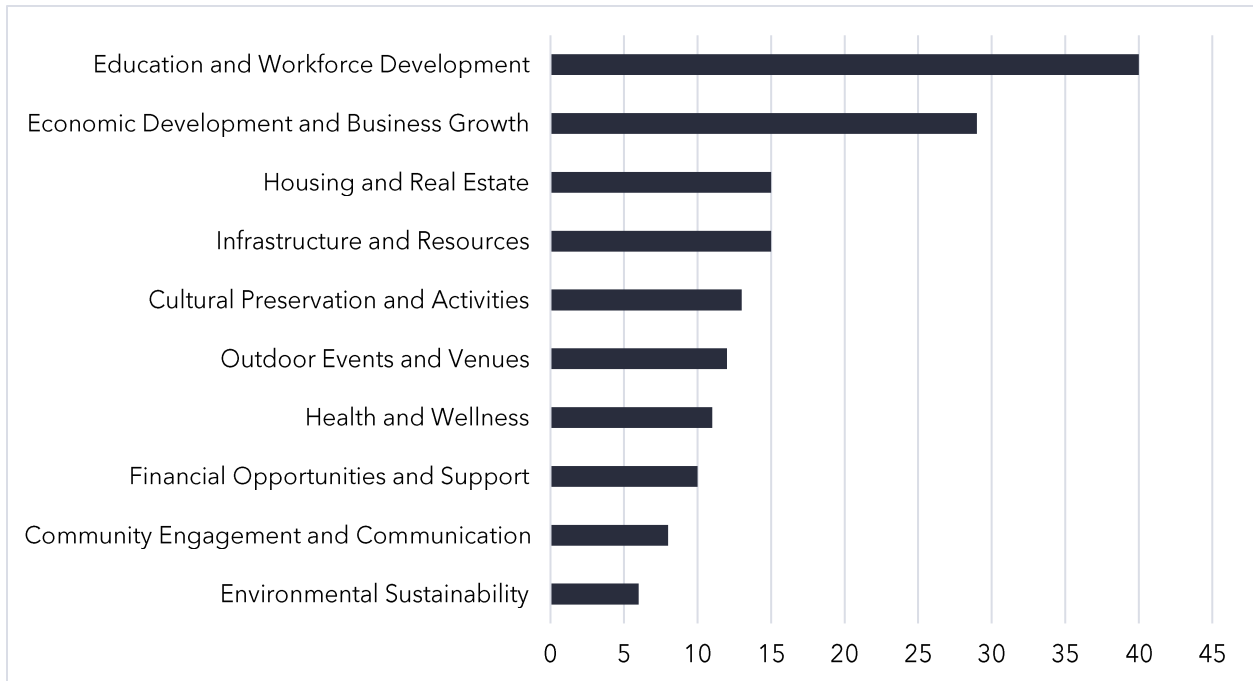


Figure 34: Coded Responses: Please list up to three of the greatest threats of the CTUIR:

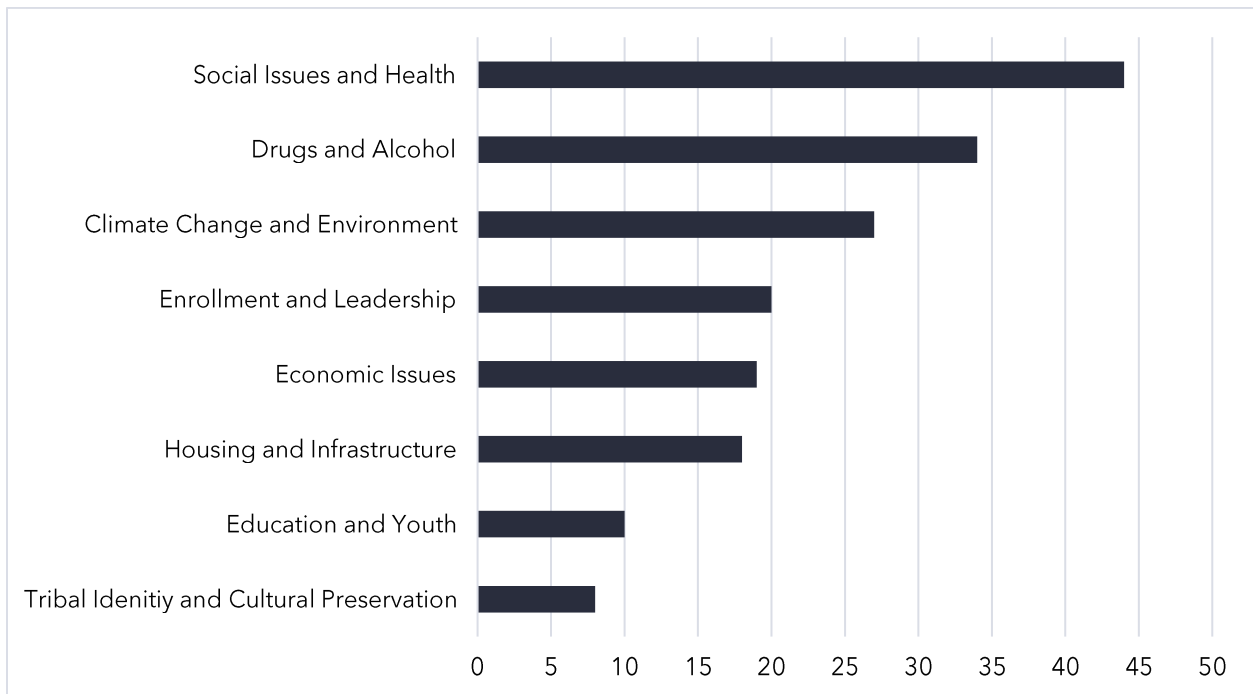


Figure 35: Coded Responses: Do you have other thoughts about the community and/or economic development that you would like to share?

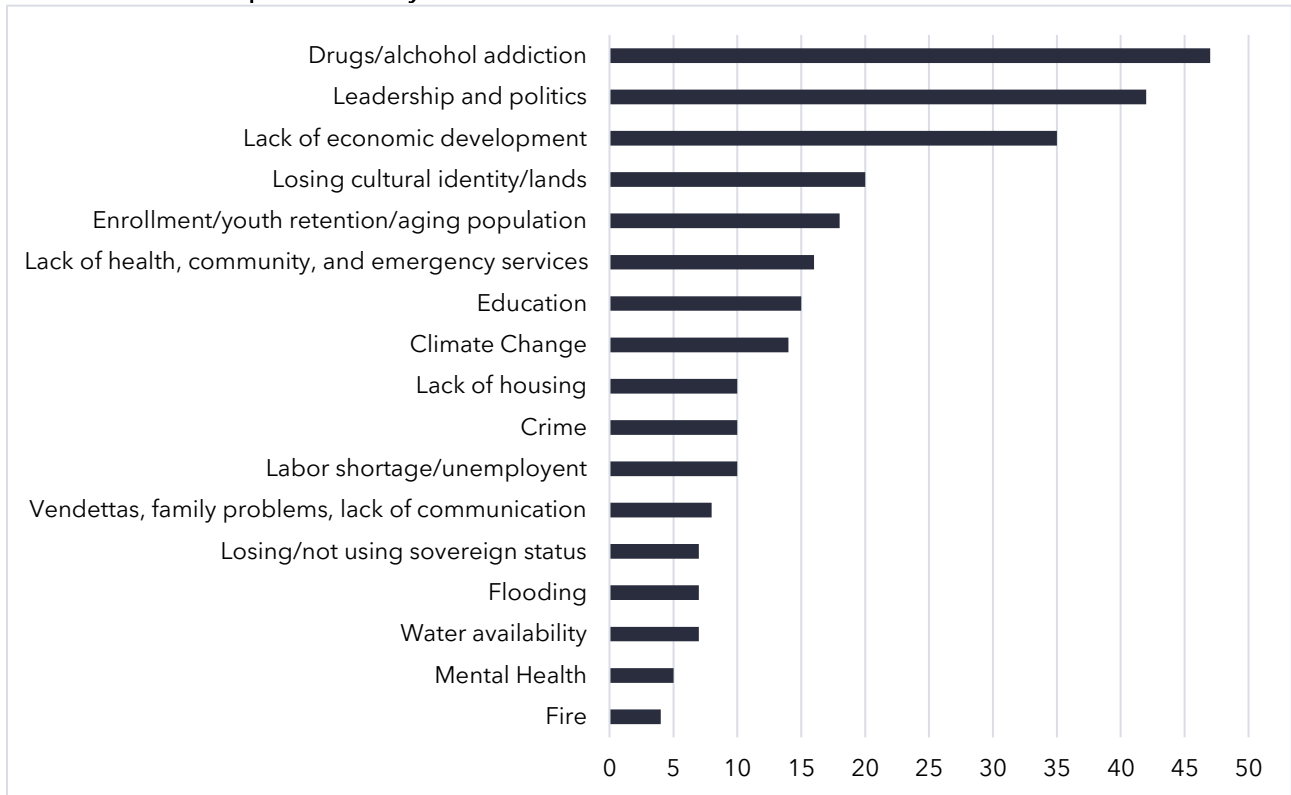


Figure 36: Coded Response: "If you wish to provide further comments/explanation on your satisfaction/dissatisfaction with the above categories please feel free to do so here:" (Economic and Community satisfaction factors)

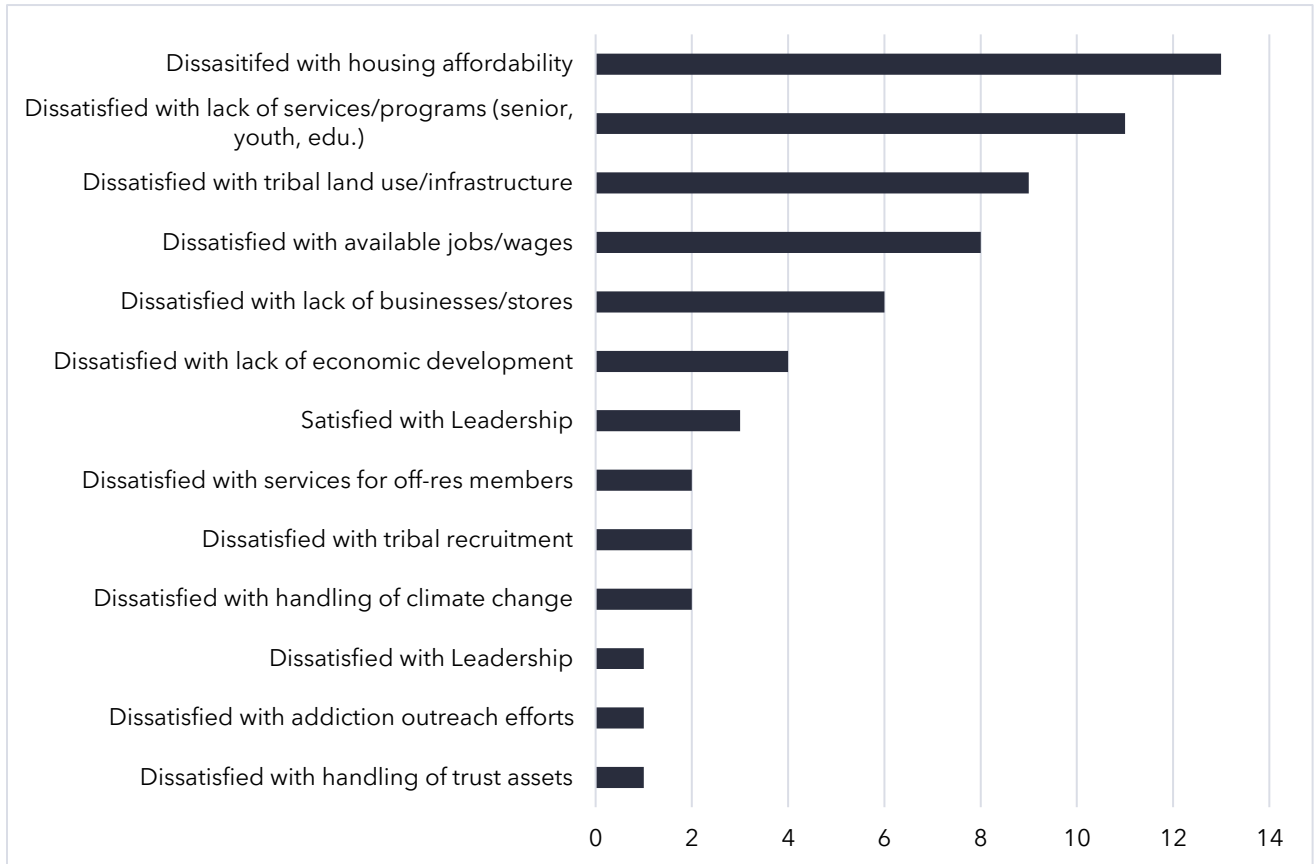


Table 22: Open Responses: Do you have other thoughts about the community and/or economic development that you would like to share?

Responses
We need a grocery store, wellness center.
Get rid of the drug dealers kick them off the rez for life.
Need to educate our youth to be respectful
I'm impressed with their accomplishments
We need a clear vision and path to move forward
Develop a CTUIR econ. dev. model centered on the diverse identities of all members, classes & ages of the CTUIR membership, bypass Caucasian styles & standards.
Alcohol is not an economic opportunity, and we don't need tourists who are centered on it either. We have talented people here with textile skills, traditional skills, and construction experience. These folks need an equal opportunity to receive assistance to build local businesses. We need a liaison that is not dependent on tribal gov to exist and operate. General Council needs to be fully active -and given the reins and resources- in these decisions without interference from "gvt"
Everyone wants a high-paying job. But they don't want to work on their leadership skills. I suggest that CTUIR pay for Toastmasters.
Would like to see HELP with our education system. We need Native American Educators that will take the time to help our students!
what matches the needs of the community--another grocery store, clothing store, etc....
Need a middle and school high, own space. Need an assisted living facility for tribal elders, feeding them traditional foods and bringing them to cultural activities. Need to take better care of our children and elders.
Not at this time
No really, we are on a good path, and I think we're spoiled :-)
The Public safety department should be a high priority. What happens in the departments that work under that umbrella should be checked and double checked. The CTUIR should make sure that the Emergency management/UTFD/UTPD and the staff can handle any issue that arises in or around our community to keep them safe! Community policing should be a priority for all cops!
The economy on the Reservation appears strong, stronger than any other area in Umatilla County.
Appreciate the thoughtful and deliberate efforts and work being done currently. Number one is keeping it safe and clean and healthy for all of our families.
Would like to see a "marketplace" where Tribal Members could set up to sell their wares during the year and especially during tourist and holiday seasons
As a small business owner, I would like to see more infrastructure go up to move my business from being mobile to having my own business building.
Keep going, keep asking questions; all I can say is that we (Umatilla) are talked about as being a powerhouse but also as a tribe divided from within.
Factoring the pay grade scale, we all know that everyone wants food, fun, and their bills paid, so we already know where the money is going to go, bringing/having places for food, fun will only ensure the money comes right back to our bank. To help each other's live life is walking together all the way to heaven! You make it to heaven, I make it to heaven, who we are in heaven is our ultimate goal, being happy and full of understanding of ourselves and everyone else.
We need to allow growth. The older members, stick so hard to ways they were taught and don't look for other possibilities.
I am proud of the CTUIR and work thus far. Invest more in people, and less in new buildings. What about fixing up all the buildings that exist on the reservation?

time to grow our own food, store for emergencies, help people grow their own food, help tribal members start small businesses, fund low- and medium-income homes with room for families and treaty right equipment, and do more to fund these things without giving excuses as to why we cannot get it done. Set realistic priorities to benefit all tribal members.

Keep up the good work!

CTUIR is a wonderful Tribe and we can do so much better for all people. We are stuck in our old ways, and some of those ways we do not want to give up for sure but some things we need to change. All of our grandparents intended for us to take care of one another. Are we really doing that when we are allowing discrimination against our own people?

Professional historical documentation of the tribal homeland territories of the three Confederated Tribes of Cayuse, Umatilla, and Walla Walla tribes in the Oregon Country of the Pacific Northwest.

Stop developing. Stop trying to lease housing to tms, instead sell land to tribal members. Stop trying to pretend clean energy exists. Expand the CTUIR border and make it so tms don't have to pay property tax or income tax. Fight for our rights, stop taking them away. Stop building.

When doing new developments there need to be defined rules put in place before there is any construction or announcement of the project. This way the community does not get the wrong idea of how the project is going to go.

Use the casino, government, and health clinic to train Cayuse tech employees. Create a mental health gym - float tanks, sensory room, massage chairs, infrared sauna, seasonal affective disorder room, rage room, anti-gravity chairs, massage therapy and acupuncture

I can't say enough about assisted living for our Elders, trained caregivers, it is a must!! Tribal employees working in these areas would be awesome, Tribal members would feel more comfortable

I appreciate all the efforts made to provide opportunity. Perhaps training youth in school on what it takes to run these businesses would plant some good seeds

Be more transparent in communications to all community members on and off the reservation. Challenge ideologies, internally and externally, that seem to oppress our people on and off the reservation. Creating a board member position that represents tribal members not living on the reservation so we are represented also and have a voice.

himeeqis q'eciyew'yew for asking for General Council member opinions.

I think the tribe could expand its international trade development by using its sovereign status.

We need more options for housing, not only for buying and building, but also for renting and already built homes. Also, just a cleaner appearance. The parks are outdated and spraypainted, the paths have cracks and goat heads, there's not much shade along the paths that are available.

BOT priorities and capital improvement projects must be realistic!

We desperately need more housing, more 24-7 childcare and more education and training

Quit buying debts owned by community or their failures of local township.


Infrastructure is so important to all of our lives. Let's give our people something to come "home" to, such as affordable housing, being able to build on their own lands by having our own engineers and surveyors, this may make it easier for TM to build on multi owner lands

Love our people and our community. Proud of our Children and the economic growth. Need to prioritize our children's, elder, and veteran needs, child-care and houses for the elders and veterans.

I think there needs to be more land available for tribal members to be able to build and live on the reservation.

There needs to be more help for members that are seeking assistance with mental, addiction, etc. in a timely manner, they are being sent off the reservation or are waiting weeks for help. Also there needs to be more opportunities for tribal members to be able to live on the reservation.

I think there should be more retail and outdoor park development.



EDUCATION applies to all ages, all genders, all tribal members. To know all we can as a Tribe and as common people of our culture and traditions, the efforts need to be emphasized, developed, and implemented. We HAVE those capabilities now and we are not utilizing them to their fullest potential... but, we have taken some of those steps and I'm grateful for that.

We need an outlet mall and more kind of entertainment for youth like maybe a race car track...

Appendix C: Background and Literature Review

CTUIR Comprehensive Economic Development Strategy, 2017-2021

The Confederated Tribes of the Umatilla Indian Reservation board, council, Economic & Community Development and Tribal members contributed and prepared a Comprehensive Economic Development Strategy for the years 2017 to 2021. Additionally, business leaders, the Economic Development Agency, and Emsi, also made contributions for data, input, and recommendations within the study. The report overviews economic opportunities for the CTUIR and action to be considered over the next few years to support their sovereignty. Other reports such as the 2010 Comprehensive Plan and OEPD, the 2011 Employment survey, the 2012 CTUIR Capital Improvements Program, and the 2015 annual report among others are utilized as guides and references within the CEDS.

CTUIR conducted a Community Survey in 2016 to determine priorities and opinions of its members in topics such as economic opportunities, strengths, and challenges. The survey received 143 responses and respondents ranked infrastructure development investments, funds for expanding the casino, retail development and a small business center as the top four economic needs. The highlighted challenges of business development in the CTUIR are as follows: Lack of workforce and needed skills, perceptions on business with tribal government, lack of infrastructure for new businesses to lease/move into, small population in NE OR, lack of tribal or state incentive packages, and 'Other' as write in answers.

Emsi analyzed the Pendleton-Hermiston MSA to determine the top six retail industries and identify their needs. The top four community development needs were: Housing/apartments, education facilities, broadband/internet, and community banks/financial institution.

In 2016, there were 8 major industries in Umatilla County who produce millions of dollars in final goods and services. From highest to lowest market value in the millions within the county: Government, Manufacturing, Transportation & Warehousing, Healthcare & Social Assistance, Crop & Animal Production, Retail Trade, Wholesale Trade and Construction. Within the identified industries, 10 specific industry clusters were identified that are identified as growth opportunities for Umatilla County:

- a) Government (excluding Education & Hospitals)
- b) Travel Trailer & Camper Manufacturing
- c) Food Processing & Manufacturing
- d) Power Generation & Local Utilities
- e) Community Organizations, Education, and Healthcare
- f) Forestry, Agriculture, and Services
- g) Transportation, Logistics, and Distribution
- h) Other Manufacturing
- i) Financial Services
- j) Real Estate, Construction, and Development

Overall goals were determined based on collected data on current needs, demand, and public input:

- Ensure that CTUIR government has a diverse and adequate revenue stream to pay for community priorities in education, natural resource protection, health care, public safety, and housing.
- Expand the options for tribe members who want to live and work on the Reservation, so that there are a variety of satisfying, meaningful, decently paid work choices in the CTUIR economy.
- Support the development of Native-owned businesses and non-profits.
- Encourage CTUIR members to develop their personal financial management abilities so that families have increasing assets and increasing ability to weather financial downturns over time.
- Plan for CTUIR members being here forever and making sure that economic choices today reserve clean water, clear air, and healthy fields, range and forests for the future

Reviewing CTUIR goals, economic resiliency, and the SWOT analysis, the strategies to be explored in the report for the CTUIR are described by an implementation matrix. Further, the matrix suggests action items for each strategy, which is organized by the goal area, objectives for each goal, and strategies/action items to achieve the objectives. Each action item has a descriptive title, timeframe, suggested stakeholders and responsible parties, and measures to use to determine progress.

Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians Comprehensive Economic Development Strategy, 2022

The Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians (CTCLUSI), tribal council, committee, assistant planners and support from Blue Stone Strategy Partners developed the CTCLUSI CEDS in 2021/2022. From the planning process they concluded to 4 main priorities for the Tribe to take moving forward:

- Strengthening the economic governance structure by renewing the Blue Earth Federal Corp. to be set as the primacy entity for economic development
- Maximizing current opportunities for growth by process of strategic investments
- Diversify the economy by capitalizing the opportunities while becoming more resilient from shocks in the current system
- Supporting opportunities for Tribal members current in the area, or who are returning back home, in regards of employment and entrepreneurship leads

KARUK Comprehensive Economic Development Strategy 2021-2026

The Karuk Tribe from the northern California to mid-Klamath River region and the Karuk Community Development Corporation (KCDC) under the investment award from the EDA reported the Tribe's 2021-2026 CEDS. The goals for the Tribe in the next 5 years are to mitigate poverty, outmigration, unemployment and households' income. Additionally, a detailed resiliency plan was also developed to accomplish by 2026:

- To provide support and advocacy regionally while creating a regional economic resilience actions plan
- Establish a regional Business Emergency Operations Center and provide leadership

- Assist small businesses while implementing education and awareness
- Assist local businesses to secure response and recovery contracting
- Implement programs for small and informal businesses to help in proper record keeping
- Establish emergency funding for small businesses
- Advance relationships with the Karuk Tribe and critical infrastructure owners and supply chains

Spokane Tribe of Indian Comprehensive Economic Development Strategy 2020-2024

The Spokane Tribe of Indian's most recent CEDS outline a 4 year economic strategy, and interestingly the Tribe's first implemented CEDS was not introduced until 2008. The Tribe's 4 year action plan was outlined between 8 goals:

- To leverage the Promise and Opportunity Zone designations
- Attract jobs to an ongoing project "STEP" of 155 acres of fee-simple land
- Establish a hotel in Chewelah, WA
- Conduct a development plan for Two Rivers Resort
- Continue next design and construction phases of STEP
- Rejuvenate the Tribe's administrative seat
- Expand access and availability of broadband
- Advance economic opportunities by engaging with regional stakeholders

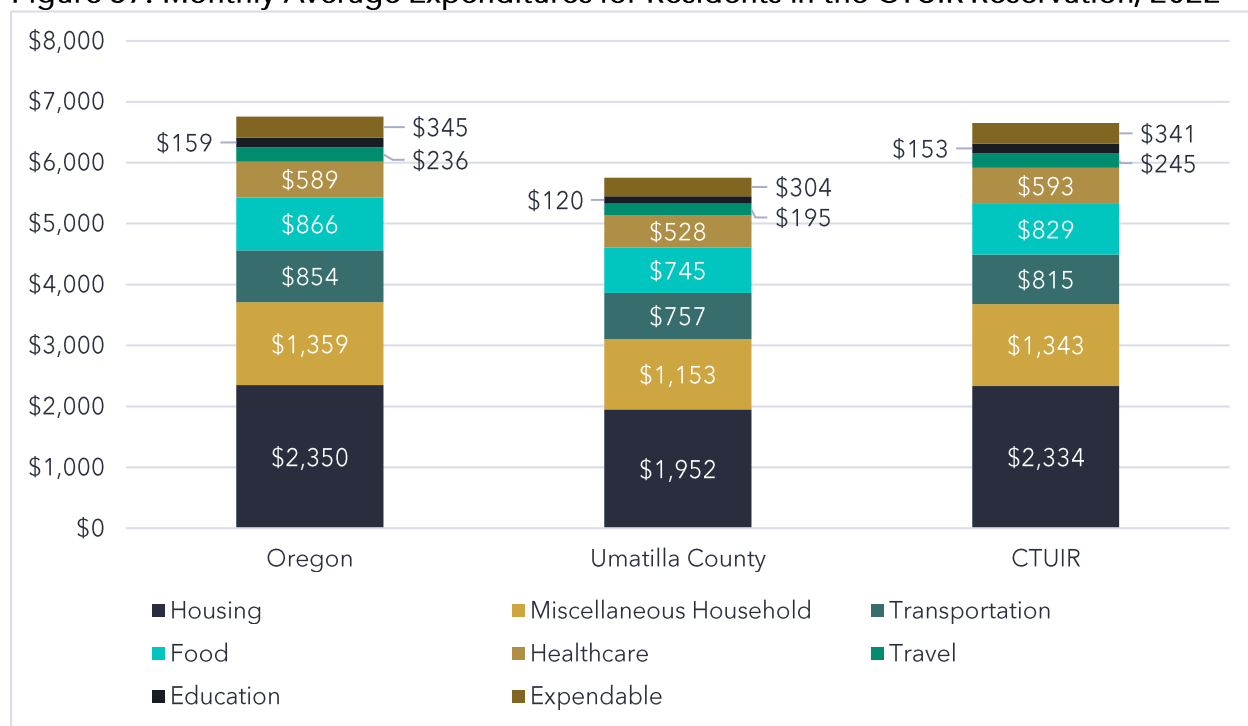
Hoopa Valley Tribe CEDS 2016-2020

The Hoopa Valley's Planning Department along with a select consultant over the course of 1 year developed the Tribes updated Community and Economic Development Strategy (CEDS). During this time the Planning Department and team outline the next action items for the Tribe to take in the coming years:

- Enhance capacity for planning and development to address the needs in the Valley.
- Conduct Valley-wide planning for both community and economic developments
- Increase and foster entrepreneurship and small business by utilizing tribal government resources.
- Remove barriers on private sector development.
- Improve self-determination to educate, train, and retain a quality workforce.
- Separate tribal business from tribal government.
- Develop new enterprises to serve community needs and that align with Tribe's Mission

Appendix D: Detailed Data

Figure 37: Monthly Average Expenditures for Residents in the CTUIR Reservation, 2022



Source: Points Consulting Using Esri Business Analyst, 2022

Table 23: CTUIR Departments with Current Programs and Services

Department	Programs	Services
Children and Family Services	Workforce Development, Food Distribution on Indian Reservations, Family Engagement, Youth Leadership	Veteran, Building Our Life Skills, Training and Employment Readiness, Elders Advisory Group
Communication		CTUIR Journal, KCUW Radio, Legislative Affairs, Annual Reports
Economic & Community Development	Farming Enterprise	Tribal Environmental Recovery Facility, Coyote Business Park, Wanapa Industrial Site, Tax incentives, Business Recruitment and Expansion
Education	After School, Cay-Uma-Wa Head Start, The CTUIR Language Program, Summer School	Adult Basic Education, The Átaw Miyánašma (Precious Children) Learning Center, college or adult vocational training, Nixyaawii Community School
Enrollment		Processes enrollment applications, relinquishments, issues Certification of Indian Blood (CIB), Tribal Identification Cards, traces family genealogy, quarterly gaming distribution, minors gaming trust accounts, elders pension/SSI plans, and burial assistance

Finance	Accounts Payable/Receivable, Credit Program	Payroll
Housing Department	CTUIR HD has 198 HUD regulated low income rental units that are safe, sanitary & affordable for Tribal member families within CTUIR Reservation; Also have 30 non-HUD rentals scattered areas around CTUIR Res.; \$18,500 emergency funds for mutual help home repair.	Provide all O&M for 230 units; Emergency funds are CTUIR Tribal funds to help with emergency repairs
Human Resources	T.E.R.O (Tribal Employment Rights Office), TVR (Tribal Vocational Rehabilitation),	Guiding and assisting tribal members to become highly qualified staff, and providing benefits along with work compliant environment
Natural Resources	Fisheries, Wildlife, Range Agriculture and Forestry, First Food Policy Program (FFPP),	Conserving, restoring, and enhancing the First Foods for CTUIR sovereign, economic, and cultural benefits
Information Technology	Records Management, Geographic Information System (GIS), Information Technology Services (ITS)	Internal technical support with limited public services, wireless internet for CTUIR community, and online interactive maps and data sets
Legal Counsel		Independent and confidential attorney services to CTUIR members, will & estate planning, potential funding for conflict of interest due to ineligible representation by Legal Aid Services of Oregon (LASO)
Public Safety	Police, Fire and Emergency Medical	Child Support Enforcement, Family protection services, Emergency Management
Public Works	Water and sewer systems, Transportation	Facilities maintenance/management
Tribal Planning		Kayak Public Transit, administering permits/ land actions, inspections, long term research and planning for CTUIR, maintain environment, public and individual health, and safety of the community,
Yellowhawk Tribal Health Center	DUII diversion, outreach programs (i.e., CHR services, WIC/Nutrition, Senior Meals, Caregivers, etc.)	Outpatient care, mental health, dental, aftercare, alcohol/drug treatment, laboratory services, pharmaceutical, radiology
Tamastlikt Cultural Institute	Rev. Ctrs., Facilities, Collections, Research	Kinship Cafe, Museum Store, Tours, Meeting Room rentals, Catering, Collections care, interpretation and education, facilities custodial, maintenance, groundskeeping and systems and controls

Source: CTUIR Department descriptions, communication with CEDS Committee

About Points Consulting

At Points Consulting (PC) we believe in the power of peoples' interests, passions, and behaviors to shape the world around us. Now more than ever, people are the primary factor in the success of businesses, organizations and communities. Our work is focused not only on how people impact communities and organizations, but how to align their potential to create more successful outcomes for all. We partner with private and public entities on projects such as feasibility studies, economic impact studies, and strategic planning. In summary, at Points Consulting we believe in "Improving Economies. Optimizing Workforce."

PC was founded in 2019 and since that time has completed many projects both regional and national in focus. Firm President, Brian Points, has worked in the public/ private management consulting industry for the past 14+ years focusing on research projects, in general, and feasibility studies, in particular. In past roles he has managed many projects funded by federal agencies including the USDA, the DoD, and the EDA.



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