Yaquina Bay Ocean Observing Initiative

Establishing Newport, Oregon as a hub for ocean observing in the Pacific Northwest

Outcomes of a strategy retreat, July 14-15, 2011
Newport, OR

Supported by:
Economic Development Alliance of Lincoln County
Yaquina Bay Economic Foundation
Advanced Research Corporation
Hatfield Marine Science Center
Port of Newport
Port of Toledo
Yaquina Bay Ocean Observing Initiative  
Outcomes of a strategy retreat, July 15, 2011

The Yaquina Bay Ocean Observing Initiative (YBOOI) is a regional initiative to establish Newport, Oregon as a hub for marine research, monitoring, and education in the Pacific Northwest. A strategy retreat was held on July 15, 2011 to engage a range of critical regional stakeholders in collaboratively identifying the opportunities and issues related to carrying forward the initiative, and to ascertain practical steps forward. This executive summary provides a brief outline of the outcomes of that event. YBOOI will use these recommendations and other input in formulating implementation plans for carrying the initiative forward.

SUMMARY OF ACTIONS

Taken as a whole, the overlapping set of recommended actions proposed by the strategy retreat participants are mutually reinforcing. A number of common themes and ideas for action emerged:

1. **Identify Funding Sources and secure funding**
   Nearly every recommended action will need some level of funding in the near or long term. YBOOI has been tasked with identifying and securing funding to carry out a range of activities, including the other tasks outlined below.

2. **Determine the best structure to govern YBOOI going forward, and implement it**
   The YBOOI Steering Committee needs to review the governance of the initiative and determine how best to accomplish YBOOI’s goals moving forward. Composition of an advisory board or working group should be carefully considered, and staffing needs should be determined.

3. **Conduct a gap analysis to determine needs in crucial areas**
   Further work needs to be done to characterize the available resources and critical needs of our region necessary for ocean observing activities such as infrastructure, contractors, facilities, transportation, communications, and education.

4. **Design and carry out an effective marketing, outreach, and communications campaign**
   A wide variety of marketing, publicity, and outreach initiatives was recommended, to be carried out for the most part by YBOOI and/or a public information officer. These actions can be combined into an initiative to develop a comprehensive communications plan for YBOOI.

5. **Develop and support education programs**
   Workforce development will be crucial to YBOOI’s success. In addition, first-class education programs in general will attract workers and businesses to the county. Goals of this objective include development of technical training programs and government contracting classes at Oregon Coast Community College and advocacy for resources for the Lincoln County School District.
6. Streamline permitting and ease regulations
In order to encourage business development and growth, and to entice new ocean observing-related firms to move to the area, some regulations and permitting should be reviewed.

7. Bring a hyperbaric chamber to the area
Currently the closest dive incident center is in Portland, limiting the types of research SCUBA diving that can be conducted locally. A hyperbaric chamber could also be used to treat certain non-dive related medical conditions.

8. Form a task force on Newport-Corvallis (OSU) relations
The Hatfield Marine Science Center, a facility of Oregon State University, is one of our region’s most important assets. More could be made of the ties between Newport and OSU.

9. Form a task force on this issue within the Governor’s office
In order to raise awareness with elected officials throughout the state, YBOOI should work with the Governor’s office to establish a task force within the Governor’s office to foster.

10. Learn from the experiences of other communities
A number of other communities world-wide have undertaken similar initiatives, and these case studies could provide valuable lessons. YBOOI should identify which communities are most like ours, and seek to learn about those cases, via research, interviews, and site visits.

CONTACT INFORMATION

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I. BACKGROUND

The Yaquina Bay Ocean Observing Initiative (YBOOI) is a regional initiative to establish Newport, Oregon as a hub for marine research, monitoring, and education in the Pacific Northwest. A strategy retreat was held on July 14 and 15, 2011 to collaboratively engage a range of critical regional stakeholders in identifying the opportunities and issues related to carrying forward the initiative, and to ascertain practical steps forward. The July 14 session was open to the general public, while the July 15 strategy retreat was by invitation only for community leaders and stakeholder representatives. This report summarizes the results of both events.

YBOOI will use these recommendations, as well as further discussions within its Steering Committee, further input from stakeholders, and other inputs, in formulating implementation plans for carrying the initiative forward.

II. ATTENDANCE

Attendance at the July 14 public session was about 45. Attendance at the July 15 retreat was also about 45. The retreat had the following organizations, regions, and offices represented:

<table>
<thead>
<tr>
<th>Sector</th>
<th>Groups</th>
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</thead>
<tbody>
<tr>
<td>Community</td>
<td>Surfrider, Lincoln County Realtors, Woodside Group, Samaritan Hospital, Oregon Coast Aquarium</td>
</tr>
<tr>
<td>Economic Development</td>
<td>Economic Development Alliance of Lincoln County, Business Oregon, Oregon Coastal Zone Management Association, Small Business Development Center</td>
</tr>
<tr>
<td>Education</td>
<td>Lincoln County School District, Oregon Coast Community College</td>
</tr>
<tr>
<td>Fishing Industry</td>
<td>Fishermen</td>
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<td>------------------</td>
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</tr>
<tr>
<td>Government</td>
<td>City of Newport, Lincoln County, Governor’s Office, State Representative Cowan, Representative Schrader, Senator Merkeley, Senator Wyden, U.S. Army Corps of Engineers</td>
</tr>
<tr>
<td>Industry</td>
<td>Advanced Research Corporation, Sexton Company, Canadian Submersible, Oregon Wave Energy Trust, Aquamarine Power</td>
</tr>
<tr>
<td>Port</td>
<td>Newport, Toledo</td>
</tr>
<tr>
<td>Research</td>
<td>Hatfield Marine Science Center, Northwest National Marine Renewable Energy Center, OSU Agriculture/Resource Economics, Coastal Oregon Marine Experiment Station, NOAA, National Science Foundation Ocean Observatories Initiative, Schmidt Ocean Institute</td>
</tr>
</tbody>
</table>

### III. PUBLIC SESSION (7/14) COMMENTS

The following comments were received from the public at the public session held Thursday evening, July 14 at 7 pm at Hatfield Marine Science Center Hennings Auditorium.

- The educational opportunities offered by ocean observing are tremendous; keep focusing on the educational aspect of this opportunity.
- Are there plans for conducting technology transfer? We should develop incubators and focus on value-added data products created from ocean observing data.
- Given the serious threats of climate change, we should include “sustainability” in Newport’s branding.
- The points of contact (for the public, media) on this issue are unclear -- we need a familiar and reliable point of contact for getting information.
- We should look at how this opportunity can be brought to bear on the “service economy” of Newport, as was done with the AccuWeather weather data in State College, PA.
- Should we rename the Hatfield Marine Science Center the Hatfield Marine Science Institute?
- It is difficult to drum up community support for an initiative that is not place-based (NSF ocean observatory data go to San Diego for processing) and invisible. The key to this might be education.
- Use the large arts community in Newport to disseminate information about marine science; e.g., docents or street performers in high-traffic places.
- Oregon Coast Community College is a valuable asset, and is willing to help. If we can predict the types of jobs that will be needed, Oregon Coast Community College can try to provide appropriate training programs.
- Develop apps for mobile devices focused on providing info about marine science.
Ocean observation programs should focus on data sharing (an example of acoustic data collection, in which data collected using a particular device is required to be shared, was provided).

IV. RETREAT OUTCOMES

Retreat participants were divided into breakout groups to discuss five topic areas related to achieving the YBOOI vision: contracting opportunities and needs, regional strengths and challenges, community benefits, infrastructure needs, and creating demand for ocean observing initiative (OOI) services. Each group discussed the strengths and challenges of the region with respect to their topic area, and the entire plenary group helped prioritize the challenges. The breakout groups then reconvened to develop a list of action items to be undertaken by various entities to address the top five challenges, and a timetable for each action. The following summarizes the priority issues (as established by polling the plenary) and the actions devised by each of the breakout groups to address the priority issues.

A. Contracting Opportunities and Needs

This group discussed regional contracting opportunities and needs for ocean observation, research, and education. The group outlined many opportunities available in this region, including its research institutions (Hatfield Marine Science Center, NOAA Marine Operations Center - Pacific, National Science Foundation Ocean Observatories Initiative, Oregon Coast Aquarium, and others), its skill sets (active fishing fleet and working waterfront, marine service industry, Toledo boatyard), and its educational and outreach institutions (Oregon Coast Aquarium, Oregon Coast Community College Aquarium Science program, Lincoln County School District with its focus on ocean literacy, Oregon Sea Grant).

This group also discussed issues facing the region with respect to contracting resources, and worked with the plenary group to prioritize the top five issues/needs:

- Conducting a gap analysis of needed and available contracting services to identify those missing from the region
- Making information about contracting opportunities readily available to all
- Providing an educated, certified, local work force to draw from for scientific instrumentation deployment and maintenance
- Securing capital to build contractors’ capability to be ready for new and new types of work before the need actually arises, and planning for facilities and services based on the result of the gap analysis
- Identifying an in-county expert to assist local businesses wanting to bid on Federal contracts.

Following is a summary of the actions proposed to address each priority issue.

Priority Issue 1: Conducting a gap analysis of needed and available contracting services to identify those missing from the region.
Over the next six months, YBOOI should identify funding sources to perform the gap analysis, and use these resources to contract for the gap analysis services through an RFP process. Those conducting the gap analysis should prepare a survey of appropriate questions, coordinating the questions with local experts in the ocean observing and education fields. They should then conduct interviews and investigations with clients and suppliers to assess needs and capabilities.

Priority Issue 2: Make information about contracting opportunities readily available to all.

YBOOI should, over the coming year, use available resources to make the public aware of contracting opportunities via a Web site, newsletters, and a public outreach program. YBOOI should consider providing a clearinghouse on its Web site for federal, state, and private grant opportunities, and provide a list of local suppliers servicing the ocean observing, research, and education industry. A mechanism should be developed that informs local businesses of these services and of ways to learn more about government contracting opportunities, such as through GCAP, FedBizOps, and ORPIN, supporting a two-way information flow between businesses and consumers.

Priority Issue 3: Provide an educated, certified, local work force to draw from for scientific instrumentation deployment and maintenance.

Over the next year or two, Oregon Coast Community College and the Hatfield Marine Science Center should assess workforce needs, identifying skills, jobs, training, and certification, and then develop needed educational and certification programs to meet these needs. This assessment should leverage the gap analysis performed under Priority Issue #1.

Priority Issue 4: Securing capital to build contractors’ capability to be ready for new and new types of work before the need actually arises; planning for facilities and services based on the results of the gap analysis.

Within the next year, YBOOI (perhaps with help from the Yaquina Bay Economic Foundation) should research potential funding sources or grant opportunities that can provide support for local contractors seeking expertise and equipment to enhance their ability to be awarded contracts for ocean observing-related work. Grant funds could be from private or government sources; either YBOOI or the Yaquina Bay Economic Foundation could apply for the funds and administer such a grant program locally, or local contracting businesses could apply directly, as appropriate. If programs require businesses to apply directly, YBOOI should disseminate information about these opportunities to local businesses. Proposals should be prioritized based on the outcome of the gap analysis recommended above. Finally, permitting processes regulating ocean observing-related activities should be streamlined to encourage business development.

Priority Issue 5: Identify an in-county expert to assist local businesses wanting to bid on Federal contracts.

Becoming a government contractor first requires special permitting and registration, and applications or bids for government contracts can be complex and onerous. Within the next year, the Small Business Development Center at Oregon Coast Community College should identify
local experts in government contracting and offer a class taught by those experts for local businesses. The class could include local “guest speakers” who have successfully completed the certification process to become a government contractor. Those businesses that successfully complete the class should then be listed in YBOOI’s directory of potential contractors on its Web site. The local expert should also facilitate a peer-to-peer group for business owners interested in bidding on government contracts.

B. Regional Strengths and Challenges

This group identified a range of regional strengths that will be assets in undertaking ocean observing-related economic development, as well as a list of challenges to be addressed. Strengths include the institutions and individuals that can contribute to the science of ocean observing, our physical proximity and ease of access to the ocean, the commercial fishing fleet, an abundance of marine service industries, and a range of infrastructures including fiber optic and broadband networks and a deepwater port. The group also considered the quality of life here (good K-12 schools, beautiful environment, moderate climate) to be assets.

Priority issues that emerged from this group’s discussions included:

- Lack of funding for expansion and maintenance of facilities
- Need for additional marine service and support industries
- Need for a hyperbaric chamber
- Underutilization of Newport’s connection to the Oregon university system
- Funding for local schools

Following is a summary of the actions proposed to address each priority issue.

**Priority Issue 1: Lack of funding for expansion/maintenance of facilities**

Funding is needed to maintain and grow facilities critical for supporting ocean observing activities. A stakeholder work group should work over the coming year to identify funding sources, including bonds, grants, and loans, for such projects and help facilitate creative solutions such as public-private partnerships. This group can help identify funding priorities and develop proposals, as well as explore whether some regulations could be loosened in order to encourage private investment.

**Priority Issue 2: Need for additional marine service and support industries**

The Port of Newport should convene a working group as soon as possible consisting of interested stakeholders to use a SWOT analysis (strengths, weaknesses, opportunities, threats) to develop a strategic plan for marine facilities and properties in Newport and beyond. The target time frame for distributing the strategic plan should be two years from now. The plan needs to document existing and needed marine service industries and the demand for such services. YBOOI should help by publicizing the need for marine service and support industries by ocean observing initiatives. The strategic plan can also help highlight the need for technical training, which could be filled by local training through the community college or business recruitment. These steps should occur after the strategic plan is complete.
**Priority Issue 3: Need for a hyperbaric chamber**

A hyperbaric chamber is needed locally in order to support research diving, and it could also be used to treat recreational divers as well as some non-diving related medical conditions. The closest such equipment is currently in Portland. A coalition of stakeholders, led by the Hatfield Marine Science Center and Samaritan Pacific Communities Hospital, should work over the coming year to develop a report on costs and benefits of a hyperbaric chamber. The report should identify parties who need the equipment, suggest locations, outline costs, and present a business plan that proves profitability. Funding sources should then be sought for purchase, using the evidence of need provided by the report. The hyperbaric chamber should be in place in Newport within three years. In the meantime, the hospital should train physicians and other appropriate staff in the use of the equipment.

Please note that the need for a hyperbaric chamber was also identified as a priority by the Infrastructure Needs group, and actions outlined here were compiled from the recommendations of both groups.

**Priority Issue 4: Underutilization of Newport’s connection to the Oregon university system**

A task force should be convened over the coming year that would include OSU, the Hatfield Marine Science Center, and YBOOI to address the question of how to better utilize Newport-Corvallis connections. Recommendations of the task force should be disseminated to all parties, and include ideas for cosponsoring seminars, workshops, and classes related to OOI. The task force might also consider how best to utilize interns and internships to further the YBOOI objectives.

**Priority Issue 5: Funding for local schools**

While the group agreed that the Lincoln County School District provides a high-quality education to all of its students, it is severely underfunded and significant cuts have been made. This issue affects both work force training to support OOI activities and the perceived quality of life in the county, which could impact our ability to attract new businesses and individuals. The Lincoln County School District needs to develop a prioritized list of needs right away that can be used in lobbying and seeking funds. The school district should partner with other educational institutions locally (Hatfield Marine Science Center, Oregon Coast Community College) to leverage funds and provide joint programs related to marine science; this initiative should begin immediately. Lobbying by the school district and the college for more funding should be ongoing.

**C. Community Benefits**

This group discussed the question, what benefits might accrue to our community (for businesses, communities, agencies, institutions) via undertaking ocean observing-related economic development? Benefits listed include an improved understanding of our ocean environment for local users and stakeholders; economic benefits such as more family-wage jobs, enhanced
tourism, and diversification of our economy; support for our educational institutions; development of Newport as a hub for marine science education activities; and improved infrastructure and housing market.

This group identified a series of issues, which were prioritized by the entire plenary. When the small breakout group reconvened to develop recommended actions, they pooled some priority issues together and developed actions accordingly, as follows:

**Priority Issue 1:** Create community buy-in for this initiative  
**Priority Issue 2:** Develop the financial and political will to pull it off  
**Priority Issue 3:** Find a way to brand this effort acceptable to Lincoln County

In order to address these combined issues, the group recommended that stakeholders need to first create a central entity (a "cartel") for organizing and conducting outreach in the community around this issue. In order to do that, YBOOI first needs to review and choose the characteristics of a good organizational structure; for example, it should consist of political and business leaders, include youth and private citizens or opinion leaders, it should remain small (no more than 5-7 people, with the support of "foot soldiers"), and should utilize a paid staff. Next we must find a mechanism to sustain this staff and the process financially. Next, the group created needs to identify and define who will be the target audience(s) for the initiative. Discussions will need to include identification of barriers to development of political/financial will. The group should also conduct research on public opinion on this topic with leadership, civic, and informal groups. Communication activities should ensure that the community can participate in the process by using tools such as engagement activities, surveys, data collection, etc. Finally, YBOOI should develop a brand -- a unique concept that overcomes comparison to Woods Hole and other institutions. For example, ocean "observing" is a vague term – how else can we “brand” this effort?

**Priority Issue 4:** Potential impact on the capacity of the region's current infrastructure (e.g., water, sewer, buildings, roads, open spaces)

To address the issue that growth and development could stress the region’s existing infrastructure, first we must understand the infrastructure needs as identified by the "ocean observers" (broadly) and, then hold a joint conversation with infrastructure providers in order to conduct a needs assessment for short- and long-term infrastructure development. Based on this information, YBOOI needs to develop a strategy for how to finance the infrastructure.

**Priority Issue 5:** Make sure we don't create win-lose situations across different sectors of this community. How can all (or most) sectors benefit?

This “big picture” issue asks how this initiative can move forward in such a way that all sectors of the community benefit. In order to ensure this equity, first YBOOI needs to recognize and define the decisions that will face the ocean observing community (whatever "community" was identified as in the first set of recommendations in this section) as well as the community at large. As the new YBOOI structure moves forward with implementation, it needs to continue to work with the community, keep its work transparent, and make decisions informed by an annual
goal-setting process and stakeholder needs. It also needs to inform stakeholder groups of the benefits of this work in an understandable way. The initiative needs to move forward in such a way that it recognizes and includes a network of partners and leaders, and its process must include both the core executive group as well as this larger network.

D. Infrastructure Needs

This group discussed the types of infrastructure that will be needed by ocean observing-related activities, and which of those infrastructure types is currently lacking in Lincoln County. The long and diverse infrastructure needs list developed by the group includes various types of space (warehouses, office space, meeting space), support services (fabrication, equipment maintenance, vessel support), transportation (road, air, shipping), scientific equipment (ROVs, AUVs), skill sets (safety training, data processing abilities, educational institutions and individuals to communicate findings), vessels of opportunity to repair and maintain oceanic equipment, and many others.

The top five prioritized needs identified by this group (and prioritized by the entire plenary) were:

- Education (technical training)
- Additional communication and broadband infrastructure
- Multi-modal transportation to decrease cost and increase speed of getting goods to Newport
- Diving facilities and diving accident recovery capability (hyperbaric chamber)
- Inter-agency and community collaboration to secure necessary funding for infrastructure

Following is a summary of the actions proposed to address each priority need.

**Priority Issue 1: Education (technical training)**

The first step to address this need is to determine exactly what types of skills are needed. To make this determination, Oregon Coast Community College, YBOOI, OSU/COAS, and other potential “customers” need to form an advisory group to determine, within the coming year, what types of skills and tech training are going to be needed to support local OOI activities. Oregon Coast Community College needs to be approached about the possibilities for offering classes and programs in the areas identified, and they need to put appropriate programs into place within two years. It will also be important that the availability of these classes, and the job opportunities that could result from taking them, be communicated to the work force. Someone, perhaps the advisory group, also needs to explore opportunities to partner with other institutions to provide this training.

**Priority Issue 2: Additional communication/broadband infrastructure**

YBOOI, in consultation with local communication firms and others, and possibly assisted by a hired contractor, should conduct a survey of current communication infrastructure availability and capability for expansion. Anticipated future needs for broadband and other communication technology should also be determined. These surveys should be conducted over the coming six
months. Subsequent steps to undertaking upgrades will need to be determined, but will certainly include engaging providers to determine possibilities for expansion/upgrades. Federal, state, and local support should be garnered for undertaking upgrades. Broadband connectivity and necessary upgrades should be completed within the coming two years.

Priority Issue 3: *Multi-modal transportation to decrease cost and increase speed of delivering goods to Newport*

To begin to tackle this issue, YBOOI should facilitate completion of a survey of transportation needs (what mode(s) will be needed? What speed(s) of shipping? What volume of goods will need to be shipped?) and current capacity. That survey should be completed within a year. Then YBOOI should focus on advocating for the most crucial transportation modes, as well as helping to find shipping efficiencies such as combining shipments or creating a Portland-Newport shipping company specifically to serve the needs of the OOI community (within two years).

Priority Issue 4: *Diving facilities and diving accident recovery capability (hyperbaric chamber)*

Note that this priority was also deemed a priority in the Regional Strengths and Challenges group, and the actions to take to address it are outlined in Section III B Priority Issue 3.

Priority Issue 5: *Inter-agency and community collaboration to secure necessary funding for infrastructure*

Similar to many of the other actions outlined in this report, the first step toward addressing this issue is to document needs, in this case for infrastructure. This step should be undertaken by a working group that includes all of the relevant stakeholders, and should be convened as soon as possible. The group and its report should identify critical infrastructure needs and prioritize funding requirements. All potential funding sources, including cost sharing and partnerships, should be explored. Finally, the group should work to secure funding for the identified priority projects.

E. Creating Demand for OOI Services

This group explored mechanisms to ensure that more organizations will utilize the ocean observing-related resources of our region, and discussed what outreach initiatives or products should be developed to provide awareness of the advantages of our region. In addition to ensuring that we define what those resources are, the group developed an extensive list of mechanisms for encouraging use of OOI resources, including:

- Develop a licensing methodology for use of data products by regional expert organizations
- Create the ability to build infrastructure for region-wide business incubation schema
- Define and reach out to currently "unexploited" customers and clients (e.g., recreational fishers, marine transportation)
- Attract expertise from outside the region by making it easy to protect innovation (patent law center, for example), operationalize research (simplify transition from research to
operations), and coordinate training of workforce with building of infrastructure needed for OOI product development

- Develop a better understanding of the details of the NSF OOI system and then educate local and regional communities as to what is coming and what is going to be required to support it
- Take advantage of the Lincoln County School District’s objective of making their students the most ocean-literate in the US
- Use the media (conventional and social) as well as science education institutions to raise awareness of ocean observing and the opportunities it presents
- Investigate whether there are any other similar deployments (like Canada) that we can learn from
- Ensure that related fields of research and science know these resources exist
- Conduct outreach via attendance and presentations at relevant conferences
- Create ocean "camps" that focus on the resources of the OOI and beta-test products developed

The group also developed a list of approaches to take to implement these ideas, prioritized by the plenary session. The top priority issues were:

- Hire a YBOOI public information officer who is able to create linkages to various media outlets to raise awareness of new developments in the region
- Strengthen links to state government, including Office of Economic Development, Governor’s office, the legislature via the Coastal Caucus, etc.
- Garner lessons from other regions (e.g., Scotland energy example)
- Provide full logistical support, including road, rail, and air links to major technology centers
- Establish an Oregon Coast Community College incubator industrial park

Following is a summary of the actions proposed to address each priority need.

**Priority Issue 1: Hire a YBOOI public information officer who is able to create linkages to various media outlets to raise awareness of new developments in the region.**

YBOOI and the Economic Development Alliance of Lincoln County (EDALCO) should first prepare a job description for the PIO based on the desired products and outcomes for this new role. Funding then needs to be identified for the position, and the YBOOI Steering Committee should be responsible for hiring. This phase should take place within three months. Working with the YBOOI Steering Committee, the PIO should help develop appropriate outreach messages, and should partner with NSF and other stakeholders to engage the community and raise awareness. Outreach initiatives should be underway within one year.

**Priority Issue 2: Strengthen links to state government, including Office of Economic Development, Governor’s office, legislature via the Coastal Caucus, etc.**

To accomplish this goal, first YBOOI needs to develop the important message (a “pitch” or “talking points”) that highlights the benefits of the initiative to all stakeholders. This task could
be accomplished by the Public Information Officer recommended under the previous Priority Issue (see above). Within the next three months YBOOI should work with the Governor’s office to create a small task force within that office to foster communication. Before the next legislative session, the YBOOI steering committee should develop a campaign to brief legislators and state agencies, fostering connections with congressional representatives in particular. This effort should focus on creating opportunities for partnerships with state and federal agencies such that YBOOI’s plans fit into existing or upcoming initiatives.

Priority Issue 3: Garner lessons from other regions (ex: Scotland energy example)

Within the next six months, EDALCO or a study group identified by the YBOOI steering committee should identify comparable communities world-wide with projects similar to this one and develop objectives for learning about those example communities. Information should then be gathered about those projects/communities (perhaps the top three most similar communities) over the coming year, possibly including site visits. The study group or other entity should establish a mechanism for contributing lessons learned from these other communities, including technological, bureaucratic, and financial lessons. Results from this research should then be shared with the relevant stakeholder groups.

Priority Issue 4: Provide full logistical support, including road, rail, and air links to major technology centers

Lincoln County and YBOOI need to spearhead an initiative to identify all transportation limitations and bottlenecks in the county, including a recapitalization analysis to prioritize infrastructure needs and an update on the current status of ongoing transportation projects (ex.: Route 20). This analysis should be completed in 2012. All stakeholders should, on an ongoing basis, identify state and federal appropriations that could be applied to the priority transportation projects identified in the analysis. Finally, transportation projects should be carried out. Recommended projects include improving rail transportation, completing Highway 20, and bringing in an operational airline and cargo carrier with instrument-rated multi-engine aircraft to Newport airport. A multi-modal transportation hub was suggested as the ideal solution. The time table for these initiatives should range from six months to several years.

Priority Issue 5: Establish an Oregon Coast Community College incubator industrial park

The Oregon Coastal Zone Management Association should establish a collection of industrial park evaluation teams to assess the commercial viability of emerging intellectual property, as soon as possible. With legislative guidance, YBOOI should develop an incubator framework and funding with state backing. This initiative could use federal cooperative research and development agreements (CRADA) or similar commercial partnerships. A roadmap for patenting and licensing products with intellectual property protection should be created within twelve months. Finally, we need to find a mechanism for enhancing opportunities to attract venture capital.
V. SUMMARY OF ACTIONS

Taken as a whole, the overlapping set of recommended actions proposed by the strategy retreat participants are mutually reinforcing. A number of common themes and ideas for action emerged, which are summarized in the following list of broad actions.

1. Identify Funding Sources and Secure Funding
   Nearly every recommended action will need some level of funding in the near or long term. YBOOI has been tasked with identifying and securing funding for a range of activities, including:
   - Hiring a contractor to conduct a gap analysis (see 3. below)
   - Hiring a public information officer
   - Implementing infrastructure, facilities, and education projects identified as priorities

2. Determine the best structure to govern YBOOI going forward, and implement it
   The YBOOI Steering Committee should review the governance of the initiative and determine how best to accomplish YBOOI’s goals moving forward. Composition of an advisory board or working group should be carefully considered, and staffing needs should be determined.

3. Conduct a gap analysis to determine needs in crucial areas
   Many of the discussion groups at the retreat concluded that further work needs to be done to characterize the available resources and critical needs of our region necessary for ocean observing activities such as infrastructure, contractors, facilities, transportation, communications, and education. These separate recommendations could be combined into one large study of resources and needs, to be carried out by a contractor hired by YBOOI.

4. Design and carry out an effective marketing, outreach, and communications campaign
   A wide variety of marketing, publicity, and outreach initiatives was recommended, to be carried out for the most part by YBOOI and/or a public information officer. These actions can be combined into an initiative to develop a comprehensive communications plan for YBOOI in conjunction with identifying funding for, and hiring, a public information officer. Actions that fall into this category include:
   - Disseminating information about potential ocean observing-related contracts to contractors, and developing a directory of contractors
   - Identifying funding opportunities (and informing contractors of these opportunities) to support initiatives by local contractors to gain expertise or equipment to enhance their ability to bid successfully on ocean observing contracts
   - Developing a list of contractors that have successfully taken government contracting classes or workshops
   - Developing messages and standard outreach products that “brand” or “advertise” our region as a center for ocean observing activities
• Conducting research on public opinion on the topic of building our economy around ocean observing activities
• Advocating for projects (infrastructure, work force development, etc.) that support ocean observing activities
• Fostering communication with elected officials

5. Develop and support education programs
Workforce development will be crucial to YBOOI’s success. In addition, first-class education programs in general will attract workers and businesses to the county. Oregon Coast Community College should develop technical training programs, the specific need for which will be identified as part of the gap analysis. Oregon Coast Community College, through the Small Business Development Center, should also offer classes and workshops to assist businesses in qualifying as government contractors. The Lincoln County School District needs to develop a prioritized list of needs for funding, and all partners need to advocate for support of the public school system and the community college.

6. Streamline permitting and ease regulations
In order to encourage business development and growth, and to entice new ocean observing-related firms to move to the area, some regulations and permitting should be reviewed.

7. Bring a hyperbaric chamber to the area
Currently the closest dive incident center is in Portland, limiting the types of research SCUBA diving that can be conducted locally. A hyperbaric chamber could also be used to treat certain non-dive related medical conditions. A task force including representatives from the Hatfield Marine Science Center and SPCH needs to prepare a scoping report on the need and cost of a hyperbaric chamber, along with a business plan for its use, and then seek funding to obtain and site the chamber.

8. Form a task force on Newport-Corvallis (OSU) relations
The Hatfield Marine Science Center, a facility of Oregon State University, is one of our region’s most important assets. More could be made of the ties between Newport and OSU (and other Oregon university campuses). A task force should be formed to explore ways to support and enhance this relationship.

9. Form a task force on this issue within the Governor’s office
In order to raise awareness with elected officials throughout the state, YBOOI should work with the Governor’s office to establish a task force within the Governor’s office to foster communication and awareness of ocean observing and its potential as an economic driver in our region.

10. Learn from the experiences of other communities
A number of other communities world-wide have undertaken similar initiatives, and these case studies could provide valuable lessons. YBOOI should identify which communities are most like ours, and seek to learn about those cases, via research, interviews, and site
visits. Results of these studies should be compiled and shared with relevant stakeholder groups.

VI. ACTIONS BY RESPONSIBLE PARTY

All stakeholders have a responsibility to contribute to the success of this initiative. The strategy retreat participants made recommendations as to appropriate responsible party for each action. Actions identified in the Strategy Retreat are broken out here by responsible party.

**YBOOI**
- Find funding for:
  - Gap analysis
  - Helping contractors retool or hire expertise
  - Facilities, infrastructure, transportation projects considered priorities
  - Public Information Officer
- Find contractor for gap analysis
- Publicize contractor opportunities, need for services, and information about contractors
- Publicize a list of those businesses that have completed the government contracting class
- Hire a public information officer, develop and disseminate a set of messages about YBOOI highlighting advantages, benefits, etc.
- Revisit the structure of YBOOI itself; implement new structure as appropriate
- As priorities are identified, advocate for priority infrastructure, facilities, transportation, education projects

**Oregon Coast Community College**
- Help assess workforce needs and develop technical training programs
- Offer class by local experts on government contracting process (SBDC)

**Hatfield Marine Science Center**
- Help assess workforce needs
- Work with hospital on reporting on need/funding sources, etc., for hyperbaric chamber
- Help convene task force on strengthening Newport-Corvallis connections

**Yaquina Bay Economic Foundation**
- Help with securing funding for contractors to purchase equipment or expertise

**Port of Newport**
- Convene group to conduct analysis of port/marine facilities needs as part of gap analysis

**Hospital**
- Work with the Hatfield Marine Science Center on developing report on need etc. for hyperbaric chamber
• Train personnel in use of the equipment

Oregon State University
• Help convene task force on strengthening Newport-Corvallis connections
• Provide required information about NSF OOI plans and needs
• Help assess workforce needs and job skills

Lincoln County School District
• Develop a prioritized list of needs to be used in lobbying and seeking funds
• Partner with other educational institutions to offer joint marine science programs

Economic Development Alliance of Lincoln County
• Assist in developing a job description for YBOOI public information officer
• Assist in identifying comparable communities/initiatives for study and site visits

Oregon Coastal Zone Management Association
• Establish a collection of industrial park evaluation teams to assess the commercial viability of emerging intellectual property

Governor’s Office
• Convene a task force with YBOOI to foster communication and awareness of ocean observing and its potential as an economic driver in our region.

VII. Contact Information

For more information about YBOOI, please visit www.ybooi.org or contact:

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VIII. APPENDIX: STRATEGY RETREAT AGENDA

8:00 Registration

8:30 Welcome, Overview, and Charge to the Group
Caroline Bauman, YBOOI Co-chair, Economic Development Alliance of Lincoln County
John Lavrakas, YBOOI Co-chair, Advanced Research Corp.

9:00 Breakout group discussions address five selected topics, identifying opportunities and challenges
  Group 1: Contracting opportunities and needs
          Room 47 Moderator: Don Mann
  Group 2: Regional strengths and challenges
          Art Room Moderator: Bud Shoemake
  Group 3: Community benefits
          Room 49 Moderator: Gil Sylvia
  Group 4: Infrastructure needs
          Room 48 Moderators: Rick Brown and Jeff Feldner
  Group 5: Creating demand for OOI services
          Community Room Moderator: Dennie Houle

10:15 Break

10:30 Plenary to present and discuss results
       Community Room

12:00 Lunch (catered by La Maison)
       Community Room and outside

1:00 Plenary to prioritize the topic areas by importance
       Community Room

1:45 Breakout groups identify actions to address the priority topic areas
       Breakout group locations

2:45 Break

3:00 Plenary to discuss tasks for each topic area
       Community Room

4:15 Wrap-up, divide up tasks, determine next steps

4:30 Meeting concludes