

**WALDPOR CITY COUNCIL
JUNE 7, 2017
MEETING NOTICE AND AGENDA**

The Waldport City Council will meet in a workshop session at 6:00 p.m. on Wednesday, June 7, 2017 in the City Council Meeting Room, 125 Alsea Highway to take up the following agenda:

1. CALL TO ORDER AND ROLL CALL
2. PRESENTATION OF DRAFT OPEN SPACE PROJECT MARKET & FEASIBILITY STUDY - Duncan Webb, Webb Management Service Inc.
3. ADJOURNMENT

The City Council Meeting Room is accessible to all individuals. If you will need special accommodations to attend this meeting, please call City Hall, (541)264-7417, during normal office hours.

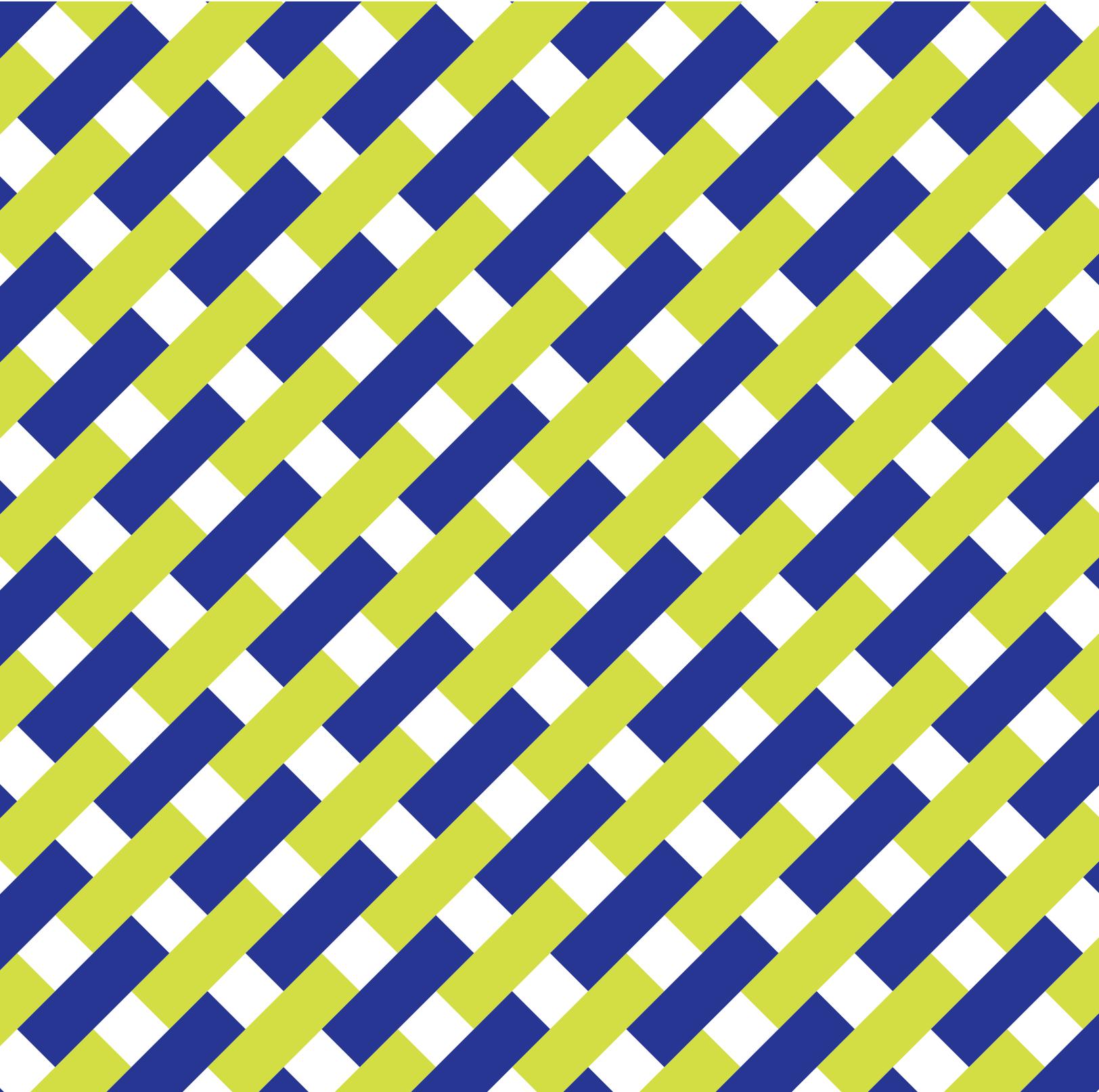
* Denotes no material in packet

Notice given this 2nd day of June, 2017 - Reda Q. Eckerman, City Recorder

webb

management
services
incorporated

building creativity





management
services
incorporated

June 2017

Executive Summary: Former Waldport High School/Open Space Project Market + Feasibility Study

DRAFT

Waldport, OR

contact:

Duncan Webb or Christina Kruse
Webb Management Services, Inc.
350 5th Avenue, Suite 4005
New York, NY 10118
t. (212) 929-5040
duncan@webbmgmt.org
christina@webbmgmt.org

executive summary

The City of Waldport would like to understand the development potential of an 11.5-acre open space in its downtown. The land, which formerly housed the Waldport High School, sits within a Special Flood Hazard Area and tsunami inundation zone. In 2013, the Lincoln County School District was awarded a \$3 million Pre-Disaster Mitigation Grant from the Federal Emergency Management Agency (FEMA), requiring FEMA to purchase all of the structures on the land as well as the development rights. In exchange, Lincoln County School District was responsible for demolishing and removing the old school buildings, restoring the land into open space, and maintaining the property in perpetuity with no future development.

The City has since conducted a number of community input efforts, yielding a series of potential uses for the site. One such use includes the development of an amphitheater. Webb Management Services was hired to help the City determine if there is demand for such a space and, if not, identify opportunities for alternative uses. Following is a summary of our work.

Forces + Trends

Across the country, we are observing declines in traditional performing arts audiences, reductions in traditional public sector arts funding, increasing competition for private sector philanthropy, and the increasing fragility of nonprofit arts organizations due to a lack of productivity gains in the sector. Other data and research, however, indicates growth in active arts participation and arts education. In addition, the sector is finally able to articulate a strong value proposition to justify public and private sector support. This generally involves making the connection between the arts and other community goals like economic development, downtown revitalization, and cultural tourism. Facilities are responding to these changes in a variety of ways, including by embracing a broader definition of culture and focusing on active programs rather than passive participation.

Market + Demographics Analysis

The market analysis examined the potential for an amphitheater in Waldport to attract and serve audiences. For this study, we defined the market as:

- * The City of Waldport,
- * Lincoln County, and
- * The 35-mile radius surrounding the former Waldport High School site.

In addition, we examined local, regional, and state tourism data.

Our research found that the market for the arts is complicated. Locally and regionally, the population is aging. In addition, there are low levels of educational attainment and household income as well as

a notable homeless population. There are, however, active arts communities in nearby cities like Yachats and Newport. The challenge is that both of these communities are boosted by tourism and that, while Waldport does have a tourist industry, it plays a smaller role in the local economy than in many other coastal cities.

User Demand + Potential Partners

In order to understand demand for an amphitheater in Waldport, we worked with City leadership to identify a number of community groups, educators, and other organizations that might have demand for outdoor performance space. This effort found that there is very limited demand for such space, amounting to only 24 potential days of use per year. There are, however, exciting opportunities for partnerships in the community, particularly with Seashore Family Literacy, Waldport High School's Coastal Tourism + Marketing Career Pathways Program, and The Confederated Tribes of Siletz Indians. These partnerships could be leveraged to further activate outdoor space.

Review of Existing Facilities

To assess the existing universe of arts and cultural facilities in and around Waldport, and in effort to identify physical and programming gaps, we developed two inventories: the first, of outdoor facilities within a 35-mile radius of the former Waldport High School site and, the second, of indoor facilities within a 35-mile radius of the former Waldport High School site. This analysis found that there are gaps in the market for high-quality performance space and for presented performing arts events in disciplines other than music and family programming. It also found that an outdoor facility in Waldport would be challenged by the weather, which tends to be cool, wet, and windy.

Review of Potential Community Benefits + Impacts

Our final piece of analysis considered the potential impact investing in an amphitheater could have on the community and how investment aligns with the City of Waldport's goals for the future. This work found that the City of Waldport and community-at-large have put considerable thought into planning for the future. Plans for the former Waldport High School site are a reflection of that planning and are in line with a number of community goals. The development of an amphitheater could further contribute to those goals by: providing a sense of place for the community; contributing to economic development and city beautification and improvement; and connecting the community and region to their natural environment and resources.

Nevertheless, our work cautioned that a project like this would have challenges. Specific challenges identified over the course of this study included:

- * Justifying a project in the arts when so much of the community is in need;
- * The community, which can be insular in nature and skeptical of change;
- * The weather;
- * The lack of supporting infrastructure (hotels, restaurants, parking, etc.);
- * Lack of funding; and,
- * The perception that this project would make more sense in nearby Newport.

Conclusions + Recommendations

All of this work led to the following conclusions and recommendations:

- * **Develop a small community amphitheater.** The current size and quality of the market does not indicate the ability to support a large amphitheater. There is, however, some demand for outdoor performance space. As such, we would recommend a small, partially covered, natural amphitheater with a capacity of 300 to 400 (and the potential to grow should the market necessitate it) that can be used for community events, performances, and nature programs. The nature programs should tie into the open site's wetlands and other natural resources and could be conducted in partnership with the Waldport High School Career Pathways program or the Confederated Tribes of Siletz Indians.
- * **Partner with the Confederated Tribes of Siletz Indians.** We recommend that the City take advantage of the unique opportunity to work with the Confederated Tribes of Siletz Indians. There is considerable breadth to this opportunity in that, in addition to working with the Tribe on the redevelopment of the former school site (including the development and implementation of outdoor programs), the possibility may also exist to develop a tribal cultural center. Such a facility could connect to the open site through programming and outdoor exhibitions and would distinguish Waldport from its surrounding communities.
- * **Rehabilitate Shelter Me's gymnasium/auditorium.** In addition, we would recommend that the City partner with Seashore Family Literacy to refurbish the former Waldport Middle School gymnasium/auditorium. Once renovated, the space could serve as a backup 'rain space' for amphitheater events, an indoor performance or pre-show space for Beachcomber Days acts, and, more broadly, as a community gathering space. Seashore Family Literacy could also take some responsibility for programming an amphitheater through the activities of its after school and summer programs.
- * **Outfit the Tideland campus to operate as a festival grounds.** Finally, we would suggest that the former high school site, along with the Shelter Me Center for Learning facility and parking lot, be outfitted to serve as a festival grounds with access to electrical hookups for vendors, moveable stages for performances, and other amenities. Such a space would support Waldport's Beachcomber Days and perhaps inspire the development of other events and festivals.

Additional suggestions included:

- * **Become the summer home of a Portland organization.** The idea here is that Waldport could become the summer performance base for an organization like the Oregon Symphony, Oregon Ballet Theatre, or the Portland Opera. A partnership like this would work to elevate Waldport as a destination for professional performing arts.
- * **Develop a summer arts and/or ecology camp.** The City of Waldport could work in collaboration with Waldport High School's Coastal Tourism and Marketing Career Pathways program, Seashore Family Literacy, the Confederated Tribes of Siletz Indians, the Oregon

Coast Council for the Arts, the Sitka Center for Art + Ecology, and/or a regional arts organization to develop a summer camp that combines the arts and ecology. This idea would bring activity to both the amphitheater and the Shelter Me building and would be in line with such goals as connecting the community to the nature of the region and recognizing and protecting Waldport's unique natural resources and beauty.

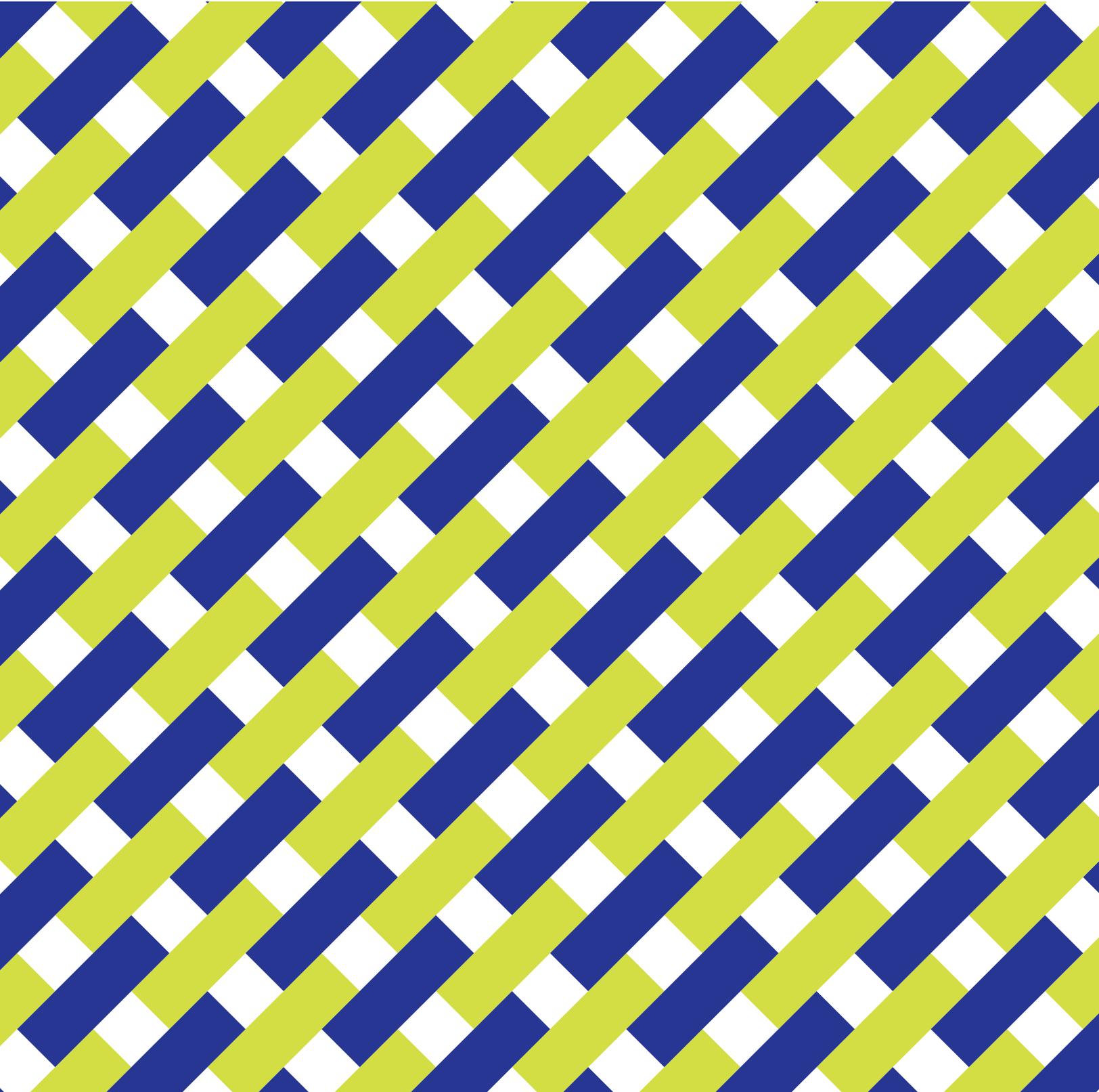
- * **Create a residency program.** The City of Waldport could host an annual artist residency program, inviting artists (through an RFP) to live and work in Waldport for a designated period of time. As part of the residency, the artist could be required to work in/with the community (providing workshops, classes, studio events, etc.) in exchange for the time and space to create. The parameters can be flexible, but should be in line with community goals. For example, one requirement of the residency might be that the artist must contribute to city beautification projects.

draft

webb

management
services
incorporated

webbmgmt.org



webb

management
services
incorporated

building creativity

June 2017

DRAFT: Former Waldport High School/ Open Space Project Market + Feasibility Study

Completed for the City of Waldport, OR

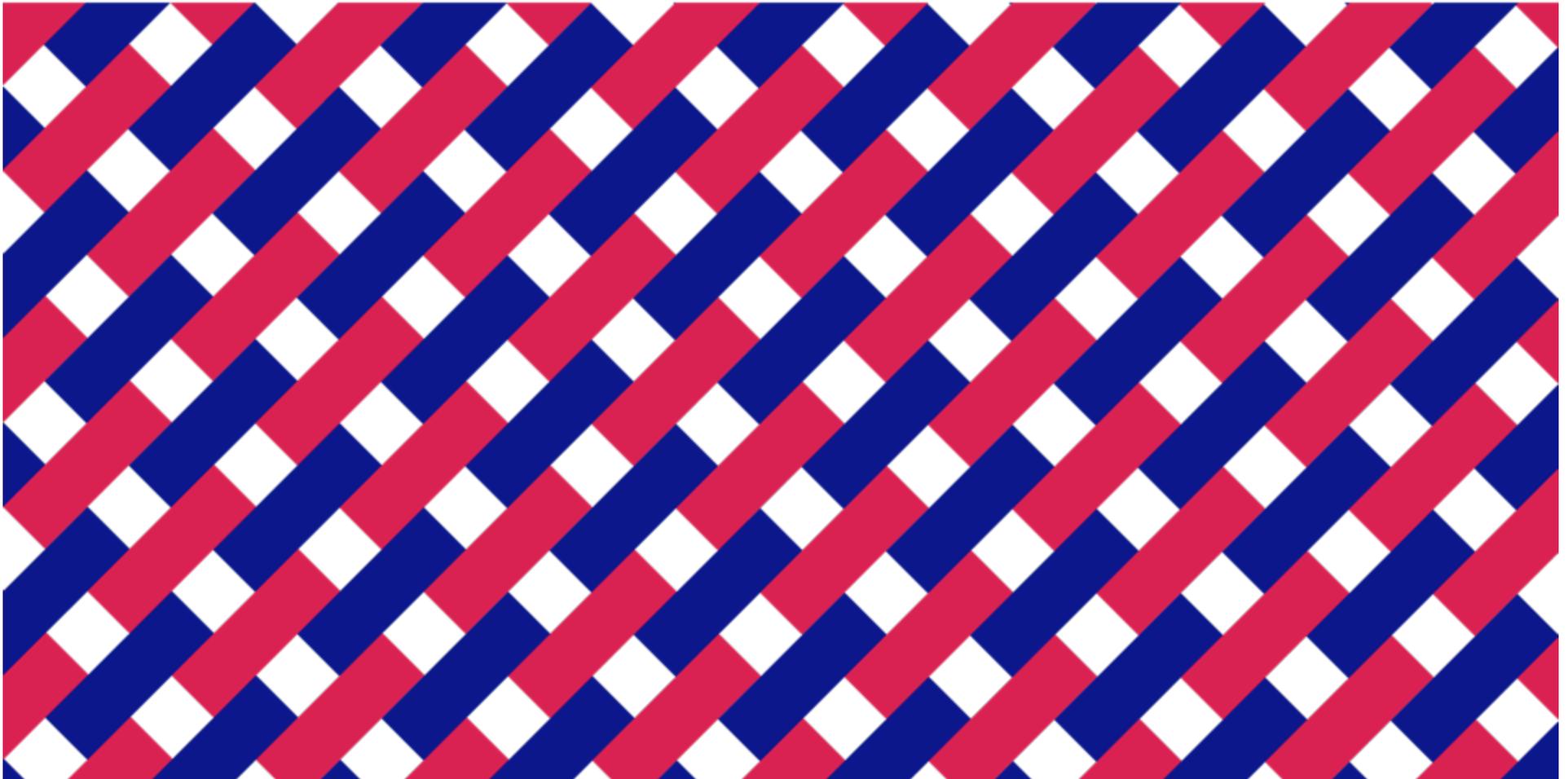


Table of contents

About the Project.....	2
Forces + Trends.....	8
Market Analysis.....	23
User Demand + Potential Partners.....	39
Existing Facilities.....	48
Benefits + Impacts.....	63
Conclusions + Recommendations.....	74
<i>Comparable Projects.....</i>	<i>79</i>



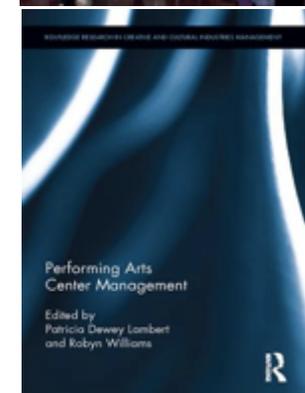
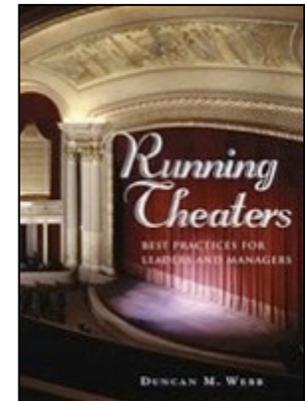
About the project



Webb Management Services

- * Webb Management Services, Inc. is a management consulting practice for the development and operation of cultural facilities. We work for governments, schools, developers, and arts organizations on facility feasibility, business planning, and strategic planning. Our practice was founded in 1997, and we recently started our 381st assignment.
- * Duncan Webb authored *Running Theaters* in 2005, a best practices guide to the operation of multi-user performing arts facilities in North America. He contributed to *Building for the Arts* and *Performing Arts Center Management*, and, since 2014, his writings have been regularly featured on the *Clyde Fitch Report*.
- * Staff all have a combination of business training and professional experience in the performing arts sector.
- * Recent work in the Pacific Northwest includes studies in Portland, Eugene, and Federal Way.

building creativity



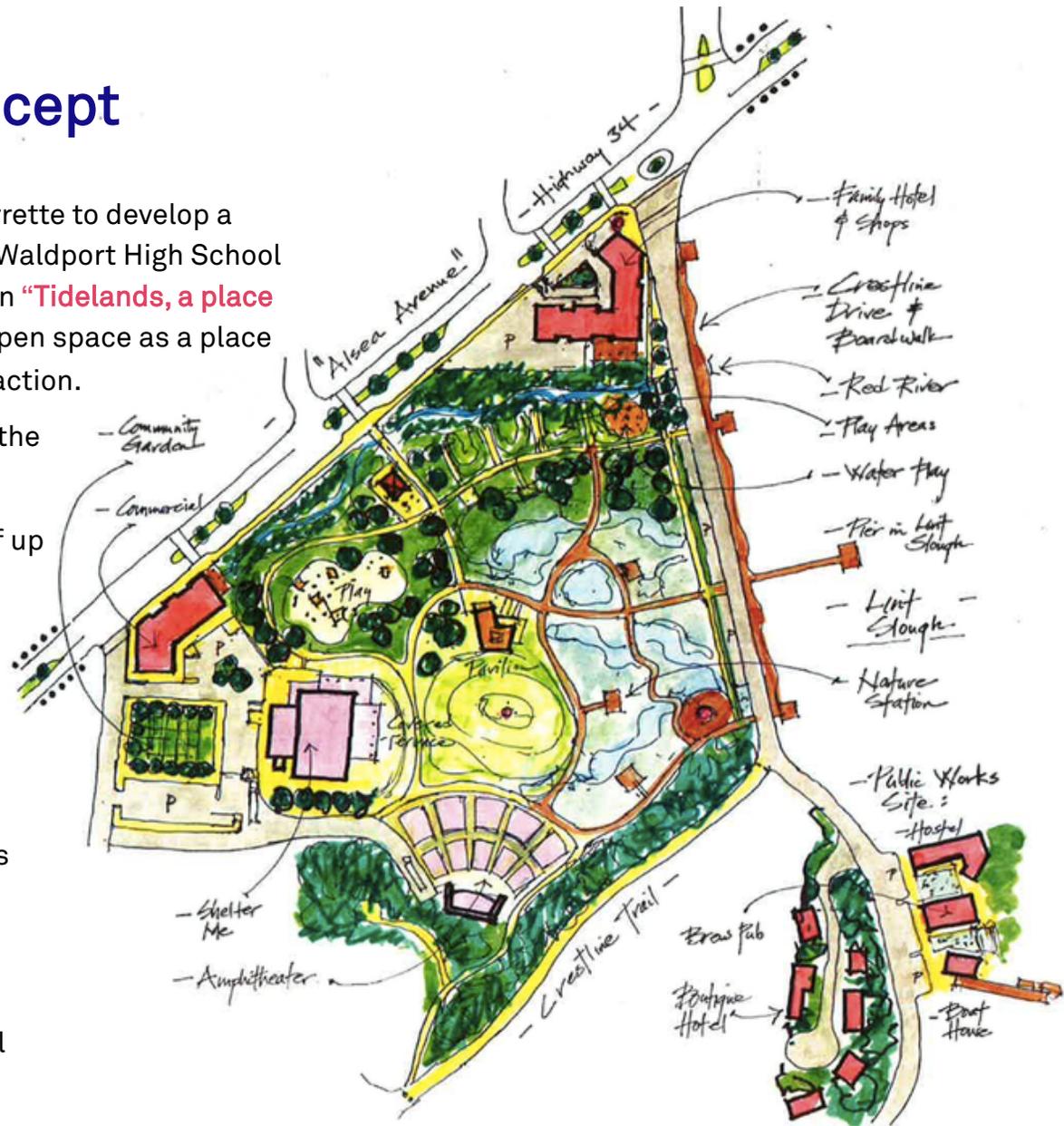
Study brief + background

- * The City of Waldport would like to understand the development potential of an 11.5-acre open space in its downtown.
- * The land, which formerly housed the Waldport High School, sits within a Special Flood Hazard Area and tsunami inundation zone. In 2013, the Lincoln County School District was awarded a \$3 million Pre-Disaster Mitigation Grant from the Federal Emergency Management Agency (FEMA), requiring FEMA to purchase all of the structures on the land as well as the development rights. In exchange, Lincoln County School District was responsible for demolishing and removing the old school buildings, restoring the land into open space, and maintaining the property in perpetuity with no future development.
- * In the time since, the City has conducted a number of community-input efforts, yielding a series of potential uses for the site. One such use includes the development of an amphitheater. Webb Management Services has been hired to help the City determine if there is demand for such a space and, if not, identify opportunities for alternative uses.



Current concept

- * In 2015, the City hosted a design charrette to develop a potential concept plan for the former Waldport High School site. The exercise resulted in the vision **“Tidelands, a place of natural beauty”** and positions the open space as a place for the community and a regional attraction.
- * Suggested uses for the site included the following amenities:
 - * An amphitheater with a capacity of up to 3,500 patrons;
 - * The land’s existing football/soccer field and softball diamond;
 - * A new playground, walking paths, picnic areas, and pavilions;
 - * Natural areas, including a wetlands and restored riparian area, with walking trails/boardwalks and an interpretive center; and,
 - * An exercise and fitness circuit/trail equipment.



Assessment methodology

- * This study will consider the case for an amphitheater in Waldport in terms of audience demand, user demand, the existing supply of facilities, and how such a project supports the broader goals of the community and the region.
- * To complete the assessment, we have:
 - * Interviewed a cross-section of cultural, political, and community leaders, as well as artists and cultural organizations active in the region;
 - * Toured local and regional cultural facilities;
 - * Studied the size and characteristics of the market area (including full-time and part-time residents, plus short-term visitors);
 - * Developed and evaluated a detailed inventory of existing facilities;
 - * Assessed user demand for a new amphitheater; and,
 - * Identified the potential benefits and impacts that a cultural facility could have on Waldport and the region.



Study informants

As part of our study process, we conducted 23 confidential, in-person and telephone interviews with the following individuals. We are grateful for their participation.

- * Betsy Altomare, Bijou Theatre
- * Steve Barham, Waldport Planning Commission
- * Sue Bennett, Waldport Public Library
- * Mark Campbell, Crestview Golf Club
- * Rachel Cotton, City of Newport
- * Jacquee Christnot, One of Us Productions
- * Lori Eaton, Waldport Chamber of Commerce
- * Jan Hansen, Pacific Coast Wind Ensemble
- * Jed Hansen, Well-Read Books
- * Linda Hetzler, Polly Plumb Productions
- * John Lavrakas, Newport Symphony Orchestra
- * Larry Lewis, City of Waldport
- * Paul Lopez, The Waldport Inn
- * Diana MacKenzie, Waldport High School
- * Senitila McKinley, Seashore Family Literacy
- * Nancy Mittleman, Pacific Dance Ensemble
- * Catherine Rickbone, Oregon Coast Council for the Arts
- * Melissa Steinman, Waldport High School
- * Leon Sterner, Yachats Commons
- * Pat Warwick, Waldport Chamber of Commerce
- * Susan Woodruff, Mayor of the City of Waldport
- * Kevin Yorks, Waldport Planning Commission
- * Sian Zander, Oregon Coast Ballet Company



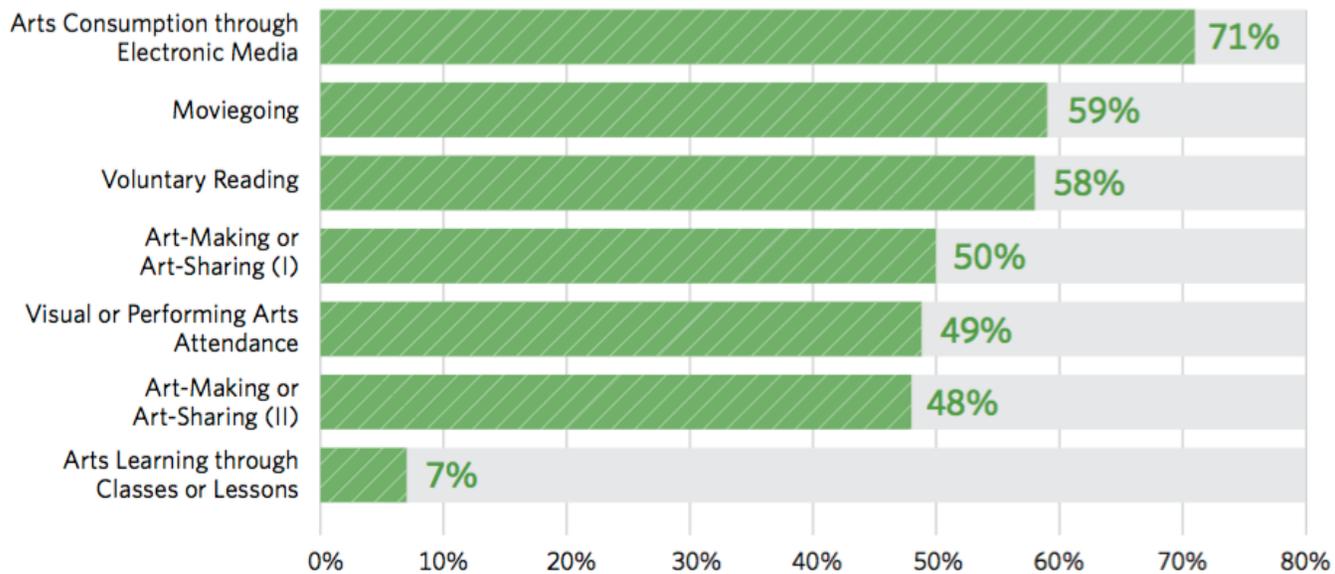
Forces + trends



Arts participation

* The NEA's Survey of Public Participation in the Arts has long been considered the best dataset on arts attendance.

Percentage of U.S. Adults Who Participated in the Arts at Least Once During a 12-Month Period, by General Category of Participation (2012)



Arts participation

- * The 2012 survey confirmed that fewer adults are attending virtually all types of performing arts activity, a trend that has been apparent through several survey cycles.

Percent of U.S. Adults Who Attended at Least One of Various Types of Arts Performance or Visited an Art Museum or Gallery: 1982–2012



Performing arts events included: jazz; classical music; opera; musical and non-musical plays; and ballet. These are all activities for which attendance rates have been tracked since 1982.

Percent of U.S. Adults Who Attended a Performing Arts Activity, by Type (Excluding Musical and Non-Musical Plays): 2002, 2008, and 2012

	2002	2008	2012
Classical Music	11.6%	9.3%	8.8%
Jazz	10.8%	7.8%	8.1%
Dance Other than Ballet	6.3%	5.2%	5.6%
Latin, Spanish, or Salsa Music	NA	4.9%	5.1%
Ballet	3.9%	2.9%	2.7%
Opera	3.2%	2.1%	2.1%

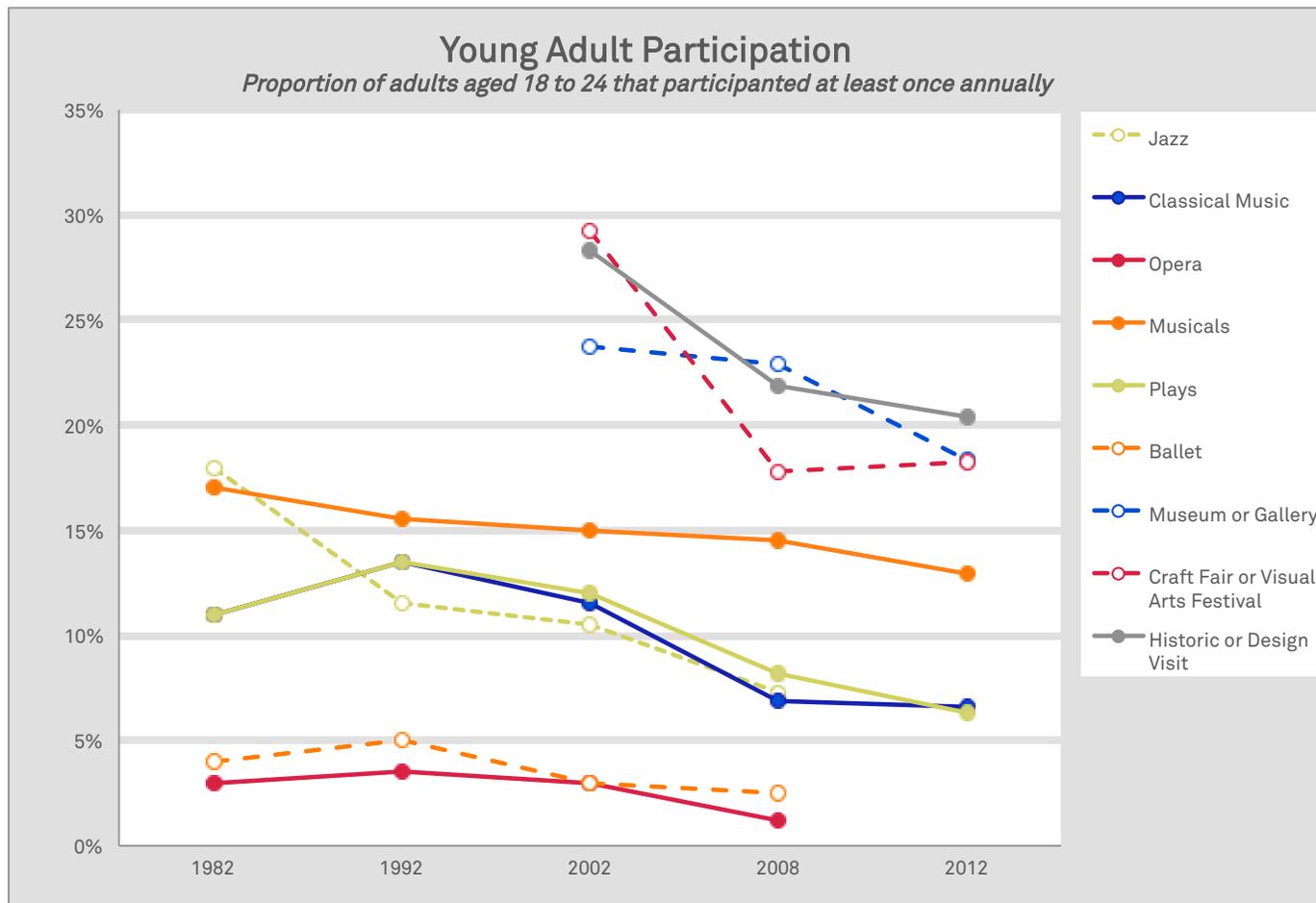
NA = This question was not asked before 2008.

Note: None of the changes between 2008 and 2012 are statistically significant.



Young adult participation

- * And that participation in the arts by younger adults has been trending downwards for over 20 years across all disciplines.



AFTA on arts participation

* In December 2015, Americans for the Arts and Ipsos Public Affairs surveyed more than 3,000 Americans over the age of 18 on arts participation, support for arts education and government arts funding, and the personal benefits and well-being that come from arts participation.

* Key findings (released July 2016) included:

- * Two thirds of Americans attended an arts event in the past year;
- * An even higher proportion of people experienced arts at a non-arts venue; and,
- * People of color are more likely to attend arts events than White people.

Note that this effort suggests that national levels of participation may be higher than suggested by the SPPA.

"Most of us seek out arts experiences."



Seven in 10 American adults (68 percent) attended an arts event in the past year, like going to the theater, museum, zoo, or a musical performance.

"We often experience the arts in unexpected places."

An even greater proportion of Americans (77 percent) say they experienced the arts in a "non-arts" venue such as a park, hospital, shopping mall, or airport.



"Across demographic groups, the arts are part of our lives."

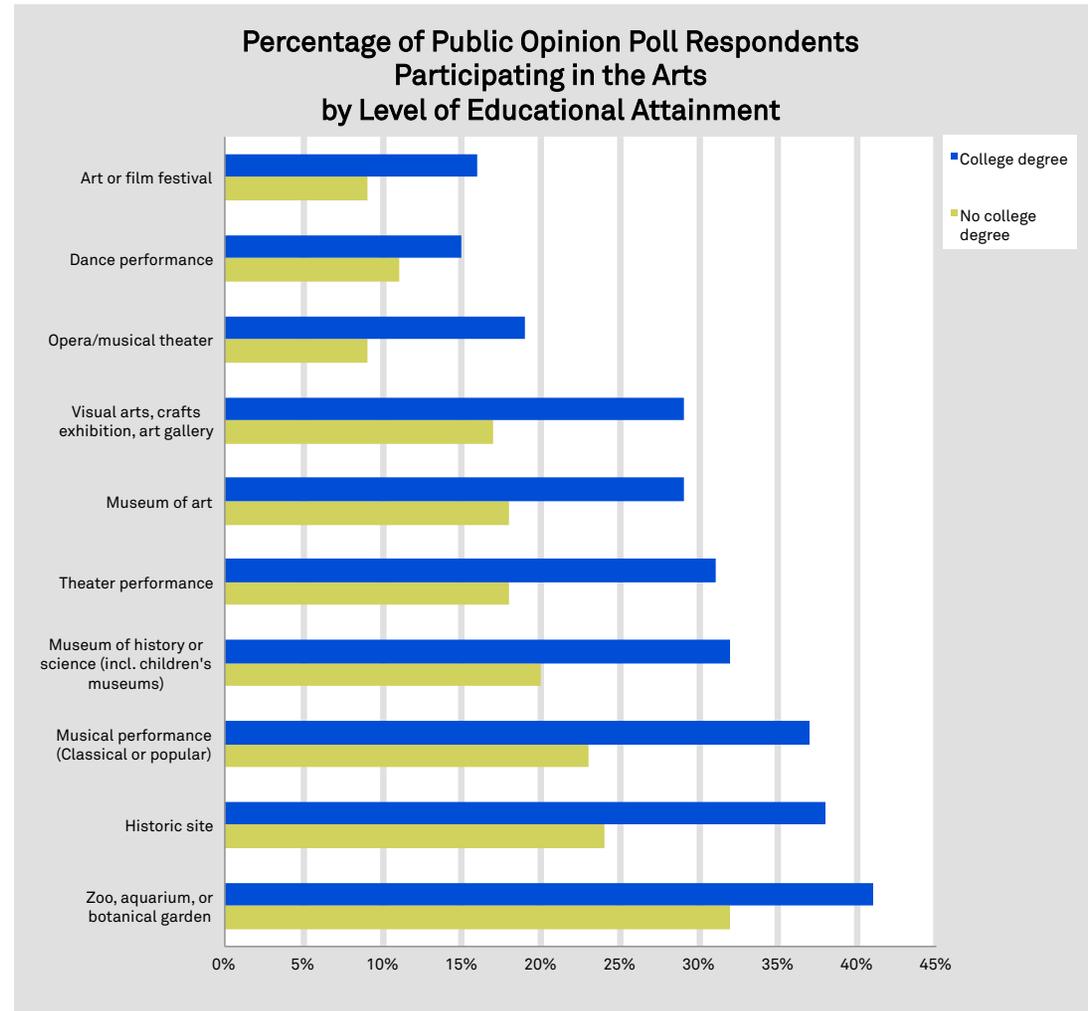
People of color were more likely to attend an arts event than their white counterparts (71 percent vs. 66 percent). Higher rates of attendance for people of color were noted for multiple art forms, including dance, museums, and theater.



Who is participating

* The AFTA and Ipsos Public Opinion Poll also shows:

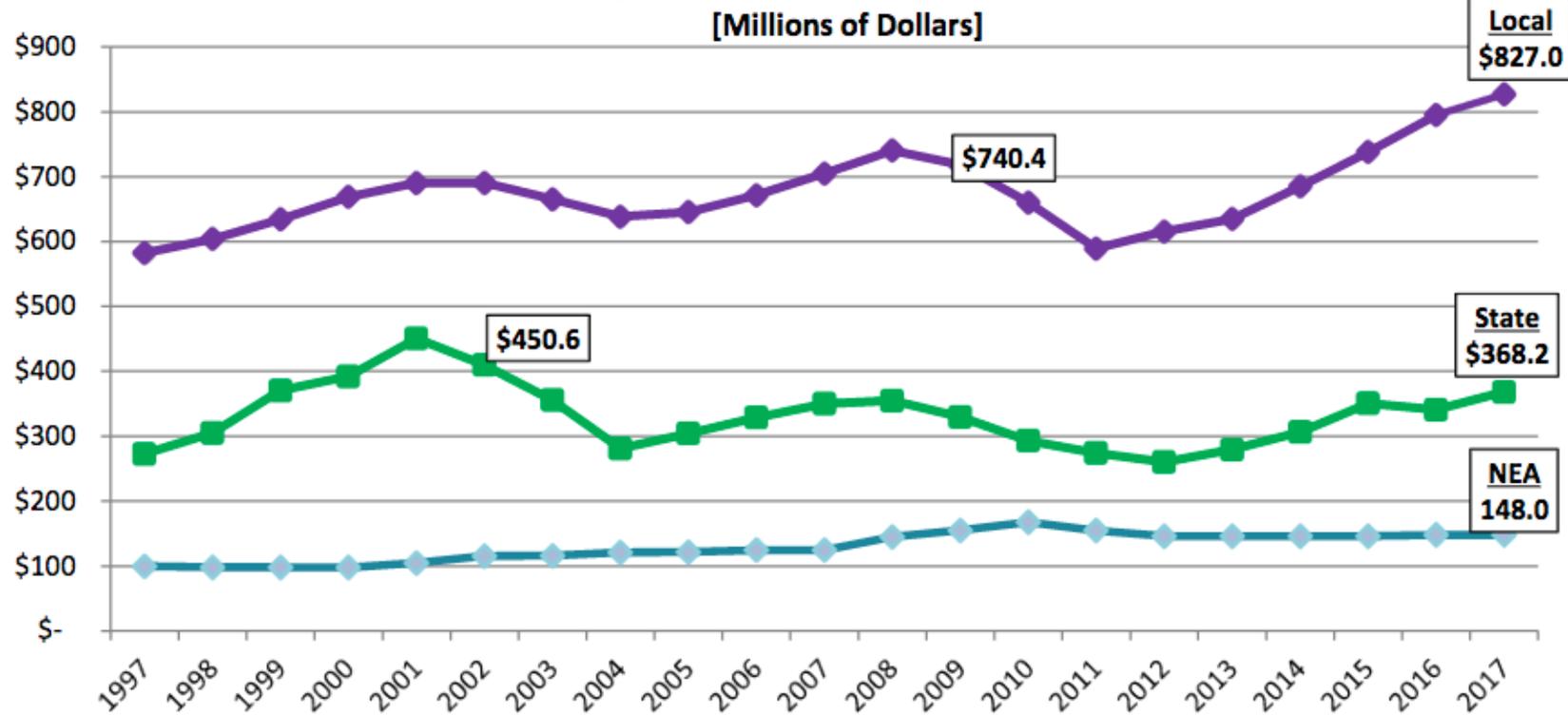
- * Educational attainment and household income are key predictors of arts participation;
- * Half of Americans are active art makers;
- * Americans believe that cultural facilities are key to quality of life, local business, and the economy;
- * Americans believe the arts are part of a well-rounded K-12 education; and,
- * Millennials are the most active arts generation, as attendees, collectors, donors, and practitioners.



Public sector funding

- * Government funding to the arts has increased in recent years, particularly at the local and state levels. However, pressure to reduce direct arts funding remains.

Government Funding to Arts Agencies Federal, State, and Local: 1997 - 2017

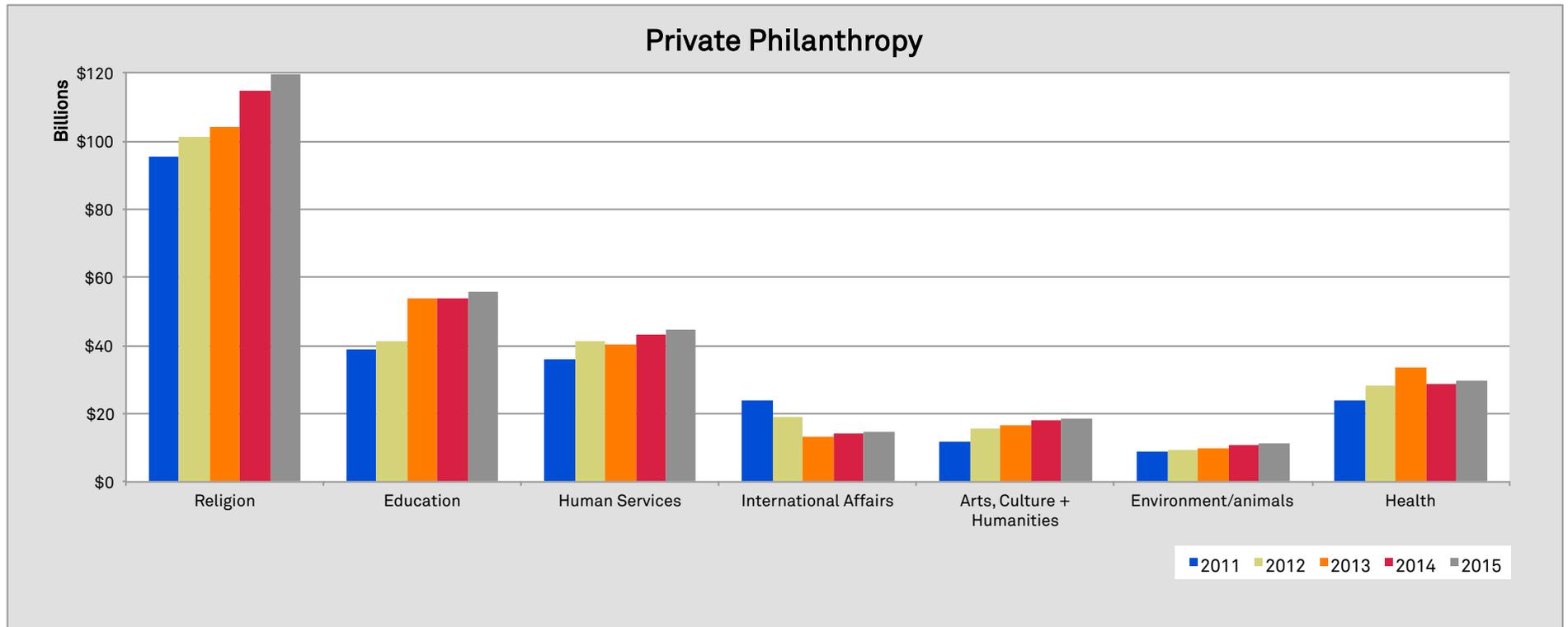


Source: Americans for the Arts



Private sector philanthropy

- * There is also more competition for private sector support coming from emerging areas like environmental sustainability and healthcare.

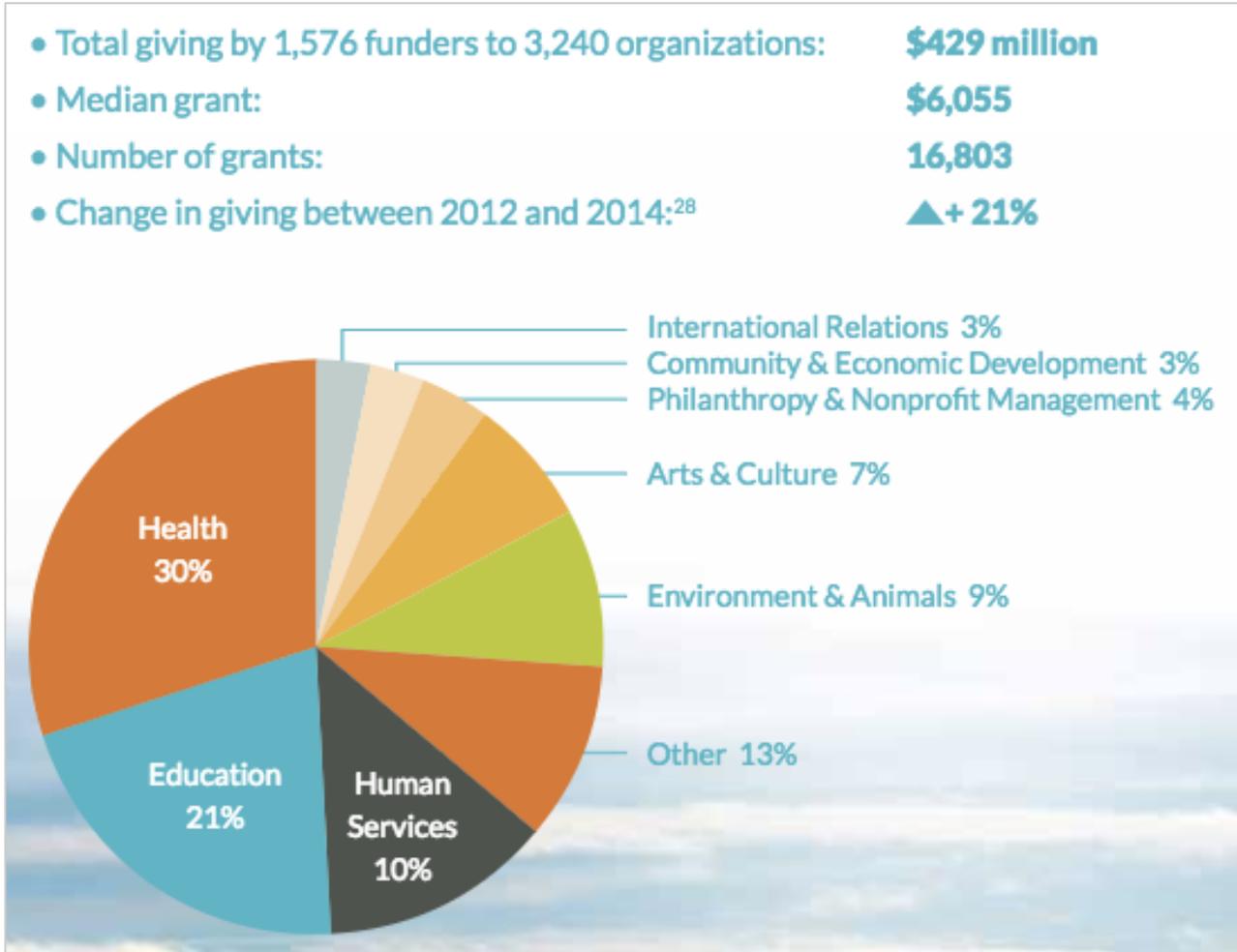


Source: Giving USA



Philanthropy in Oregon

- * Published by Philanthropy Northwest, the 2017 edition of *Trends in Northwest Giving* indicates that grantmaking in Oregon rose 21% between 2012 and 2014.
- * Health and education received the most funds at 30% and 21%, respectively. The arts and culture received 7% of funds.
- * In total, 1,576 funders gave 16,803 grants to 3,240 organizations.



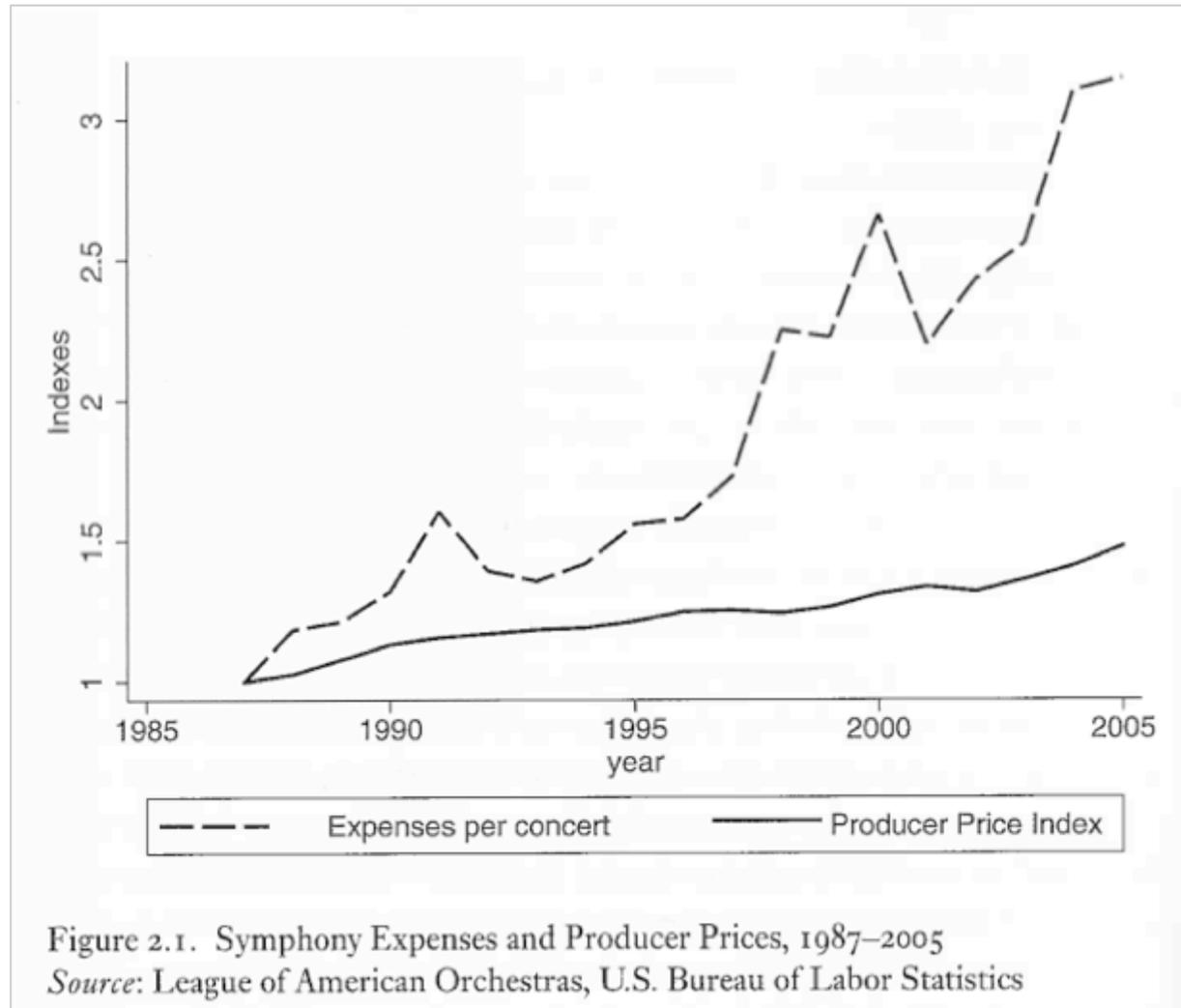
- Total giving by 1,576 funders to 3,240 organizations: **\$429 million**
- Median grant: **\$6,055**
- Number of grants: **16,803**
- Change in giving between 2012 and 2014:²⁸ **▲+ 21%**

Source: Philanthropy Northwest's Trends in Northwest Giving 2017



Baumol's cost disease

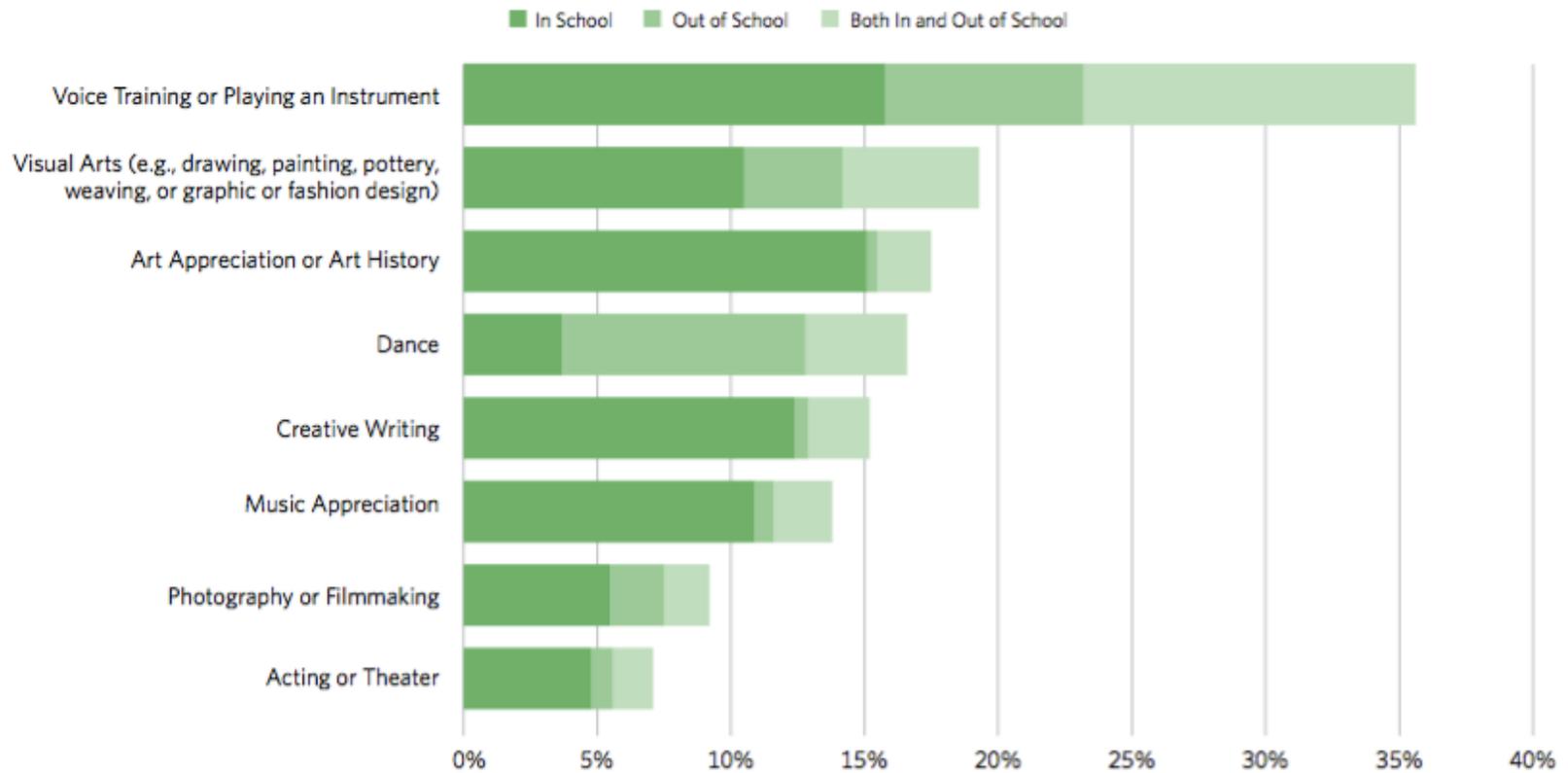
- * The economic challenge of arts organizations is that there are no productivity gains over time in the way that the “product” is created. Thus, as costs inevitably increase, arts organizations must fundraise more money every year just to stay even.



Active arts participation

- * The good news is that active participation in the arts is growing, with more people looking for ways (and places) to express their personal creativity.

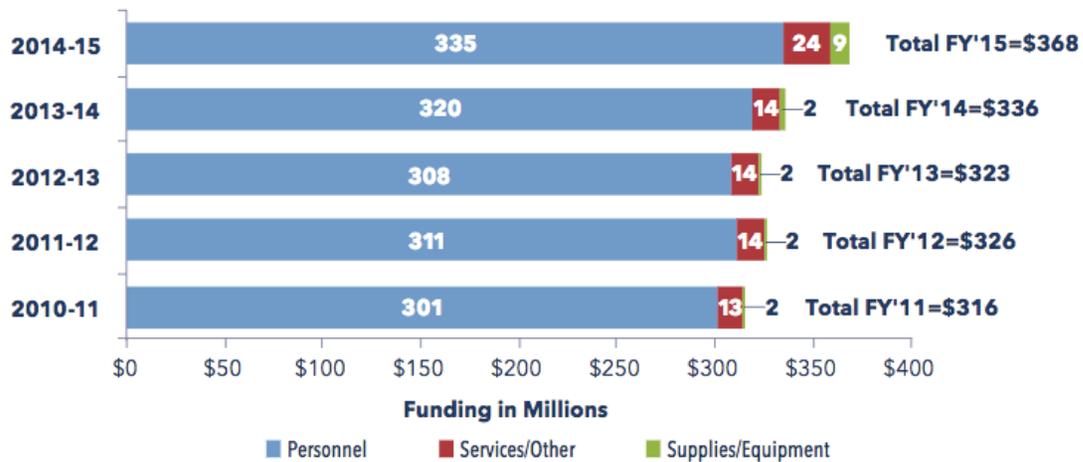
Percent of U.S. Adults Who Ever Took an Art Class or Lesson, Whether In or Out of School, by Subject: 2012



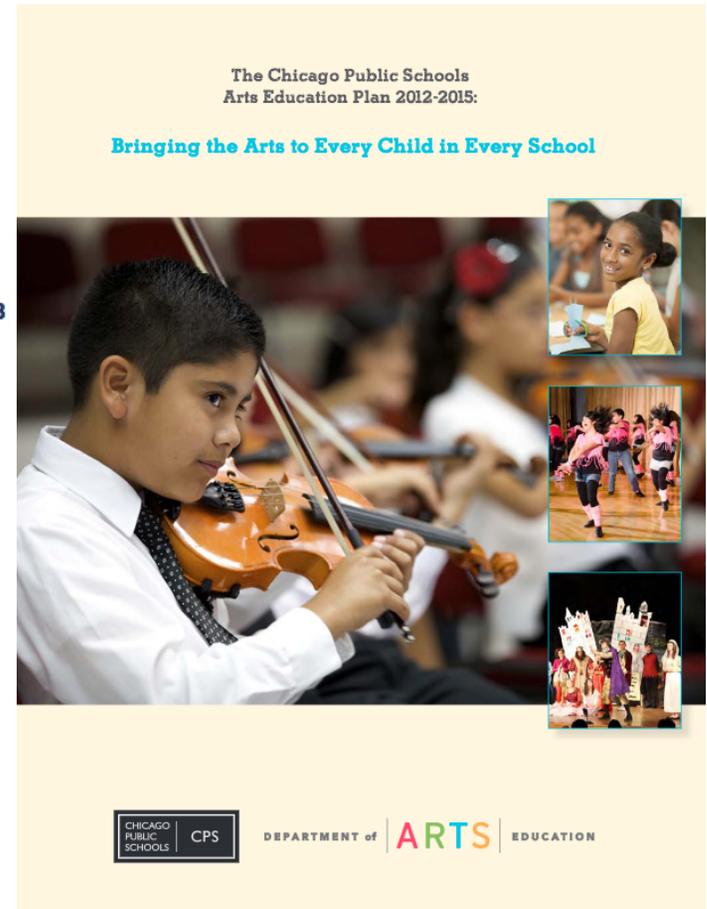
Arts education

- * Arts education is also growing, mostly due to the development of outreach and education programs by nonprofit arts organizations.

Figure 72. Distribution of Funds Budgeted for the Arts (in Millions of Dollars)



From the NYC Department of Education 2014-2015 Arts in the Schools Report



The arts value proposition

- * In addition, the sector is finally able to articulate a strong value proposition to justify public and private sector support. This generally involves making the connection between the arts and other key community goals such as:
 - * Economic development;
 - * Creative place-making;
 - * Downtown revitalization;
 - * Cultural tourism;
 - * Quality of life;
 - * Business and workforce development and retention;
 - * Community development;
 - * Arts in education; and,
 - * Healing – physical, mental, spiritual, and communities.



Facilities responding to changes

- * Cultural facilities are responding to these challenges and opportunities, as follows:
 - * By embracing a broader definition of cultural activity that reflects the diversity, heritage, and means of creative expression of all people;
 - * By shifting from the old image of a theater as a place that lights up occasionally for the select few to a new image of a place that is always open, always active, and much more inclusive, aspiring to be the community living room;
 - * Through more collaborative efforts to promote the development of cultural districts;
 - * By focusing on active programs rather than passive participation;
 - * By focusing more on community engagement and development;
 - * By placing greater focus on the social experience of attending an event;
 - * By finding ways to maintain a low cost of access for nonprofit arts groups;
 - * Through the addition of secondary, temporary, and outdoor spaces; and,
 - * By providing audiences with some measure of control over their experience.



Trends in cultural tourism

- * The United Nations World Tourism Organization defines cultural tourism as “movements of persons for essentially cultural motivations such as study tours, performing arts and cultural tours, travel to festivals and other cultural events, visits to sites and monuments, travel to study nature, folklore or art, and pilgrimages.”
- * Data indicates that cultural tourists spend 60% more and stay longer than other types of travelers. They also travel with greater frequency.
- * Cultural tourists tend to be affluent and well-educated.
- * The cultural tourism market has typically been dominated by Baby Boomers (those born between 1946 and 1964). However, the Millennial population (those born between 1982 and 2004) represents a growing portion of the market: as of 2014, 73% of Millennials wanted “to engage [with] a destination’s arts and cultural assets” (*State of the American Traveler*, Destination Analytics, July 2014).

Source: Americans for the Arts 2014 National Cultural Districts Exchange—Cultural Tourism Attracting Visitors + Their Spending



Market analysis



Market analysis

Overview

This analysis will define and examine the market for the arts in Waldport, paying close attention to key indicators for arts participation and attendance such as educational attainment and household income.

Methodology

Defining a market, or potential audiences, can be a complicated issue for arts facilities. As a starting point, the market for an amphitheater in Waldport is the City of Waldport. But, Waldport does not exist in a closed system—it is part of a larger region with interacting residents and visitors coming from around the world. As such, we defined the market for an amphitheater in Waldport as:

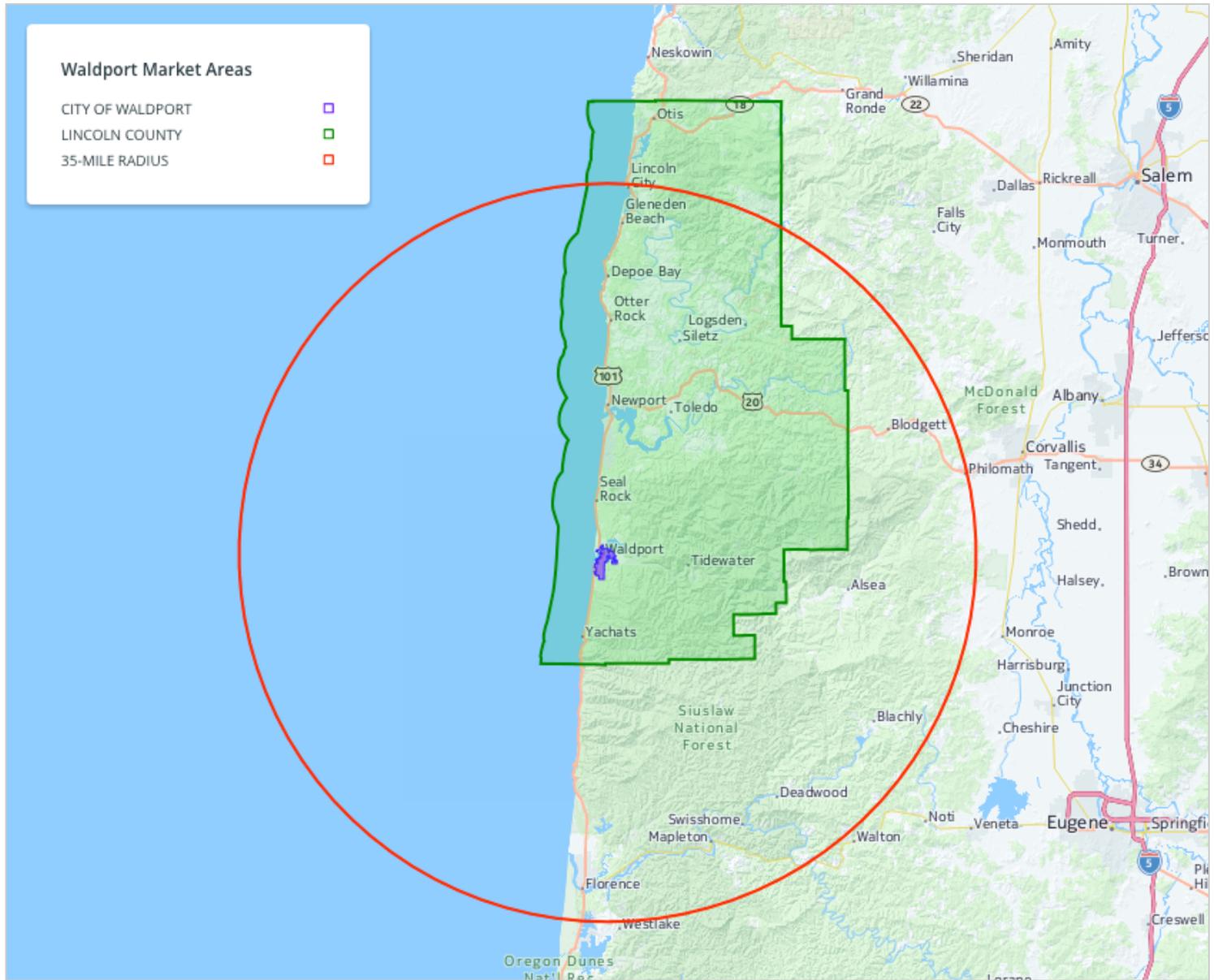
- * The City of Waldport,
- * Lincoln County, and
- * The 35-mile radius surrounding the former Waldport High School site.

We then collected demographic data from Claritas Segmentation + Market Solutions, a market research resource that expands and extrapolates Census data using a variety of inputs. For context, national figures have also been included.

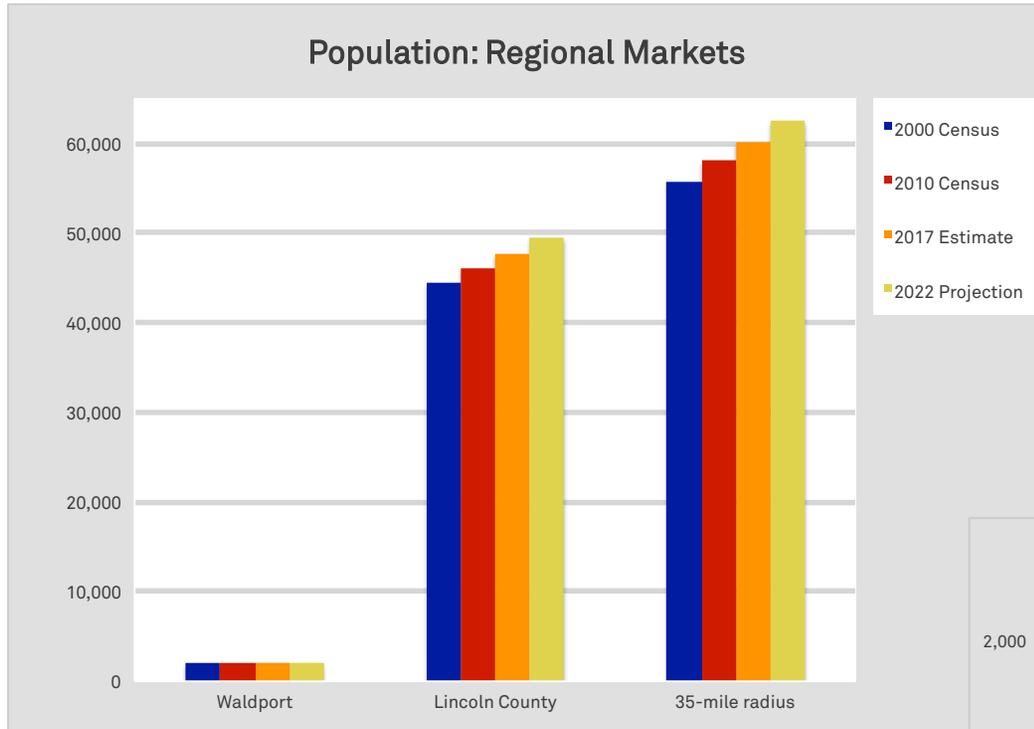
Lastly, we examined local and regional tourism data in order to assess its current size of the non-resident population and the potential to attract visitors for cultural programs and events.



Selected market segments

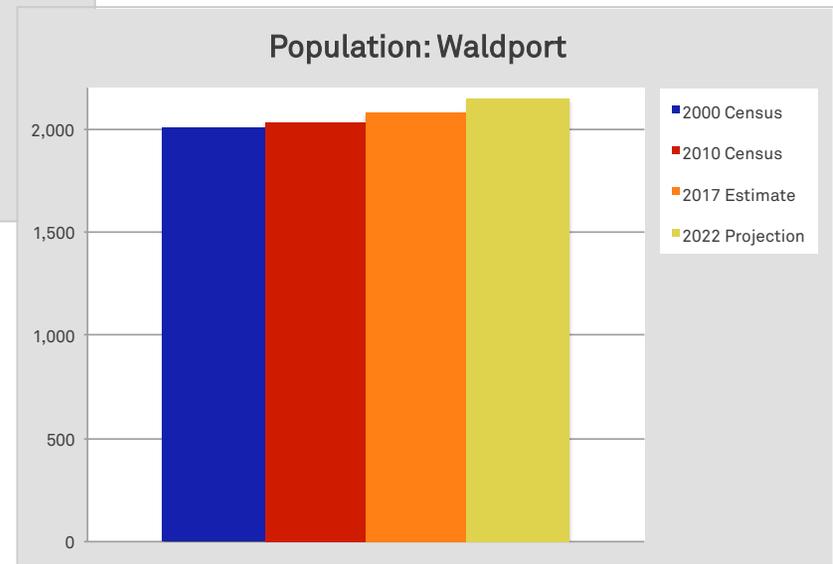


Market size + growth



* The resident market for the arts is small: the 2017 population for the City of Waldport is estimated at 2,079, the County population is estimated at 47,726, and the 35-mile radius population is estimated at 60,194.

* Between 2010 and 2022, however, it is projected that the population in all market segments will grow at a faster rate than it did from 2000 to 2010. The City of Waldport, for example, grew by only 1% between 2000 and 2010; between 2010 and 2022, it is projected to grow by 5.68%. In the County and 35-mile radius, the population is projected to grow by slightly more than 7%.



Market size: future projections

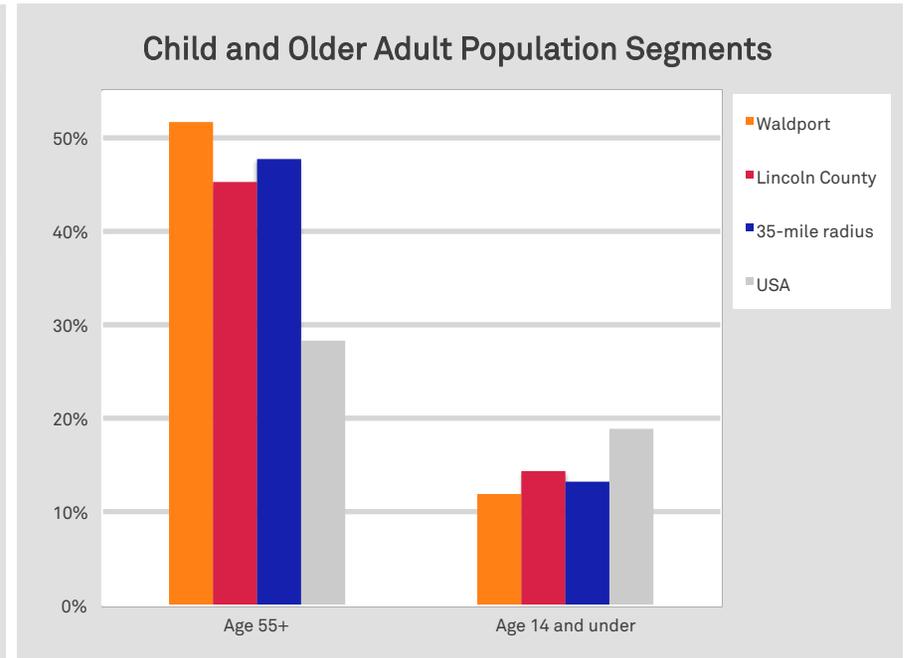
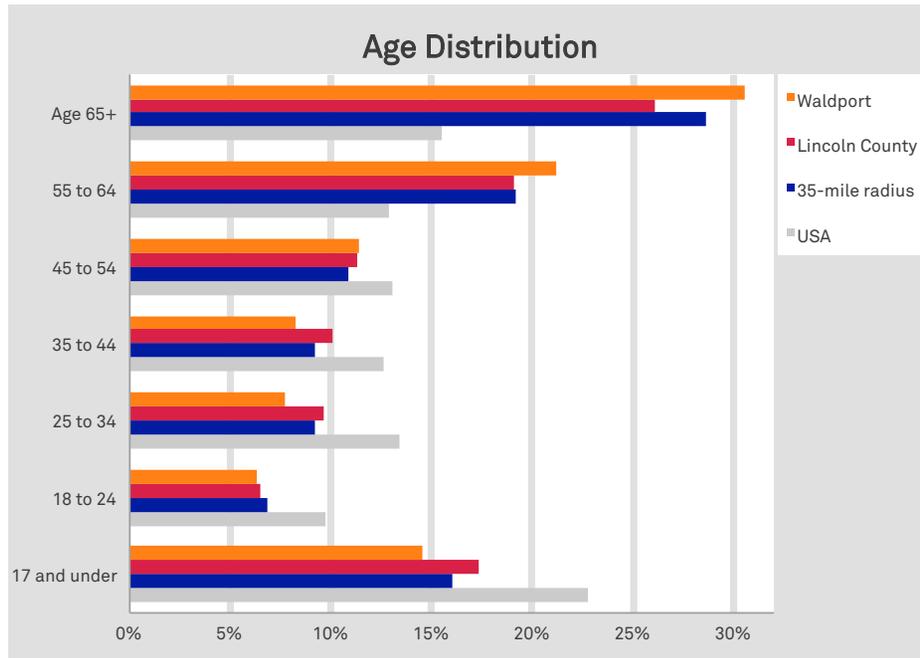
- * The Population Research Center at Portland State University’s College of Urban and Public Affairs released a draft of the **Coordinated Population Forecast for Lincoln County, its Urban Growth Boundaries (UGB), and Area Outside UGBs 2017-2067** in March 2017 (the full report is scheduled to be released in late June 2017). The study draws on historical trends in Lincoln County’s population in order to make forecasts for the future.
- * The study projects that, between 2017 and 2035, Lincoln County’s total population will increase by more than 5,000. Between 2017 and 2067, it is projected to increase by 12,600.
- * The chart below, taken from the study, indicates growth within Lincoln County’s urban growth areas. In Waldport, it is projected that, by 2067, the population will reach 3,359.

Lincoln County and Sub-Areas—Historical + Forecase Populations, and Average Annual Growth Rates (AAGR)								
	Historical			Forecast				
	2000	2010	AAGR (2000-2010)	2017	2035	2067	AAGR (2017-2035)	AAGR (2035-2067)
<i>Lincoln County</i>	44,479	46,034	0.3%	47,944	52,962	60,628	0.6%	0.4%
Depoe Bay UGB	1,174	1,394	1.7%	1,459	1,826	2,342	1.3%	0.8%
Lincoln City UGB	8,717	8,969	0.3%	9,329	10,352	11,854	0.6%	0.4%
Newport UGB	10,118	10,554	0.4%	10,825	12,728	15,757	0.9%	0.7%
Siletz UGB	1,133	1,314	1.5%	1,342	1,530	1,795	0.7%	0.5%
Toledo UGB	3,645	3,730	0.2%	3,777	4,089	4,456	0.4%	0.3%
Waldport UGB	2,220	2,244	0.1%	2,282	2,693	3,359	0.9%	0.7%
Yachats UGB	617	690	1.1%	773	998	1,325	1.4%	0.9%
Outside UGBs	16,855	17,139	0.2%	18,156	18,747	19,739	0.2%	0.2%

Sources: U.S. Census Bureau, 2000 and 2010 Censuses; Forecast by Population Research Center (PRC).



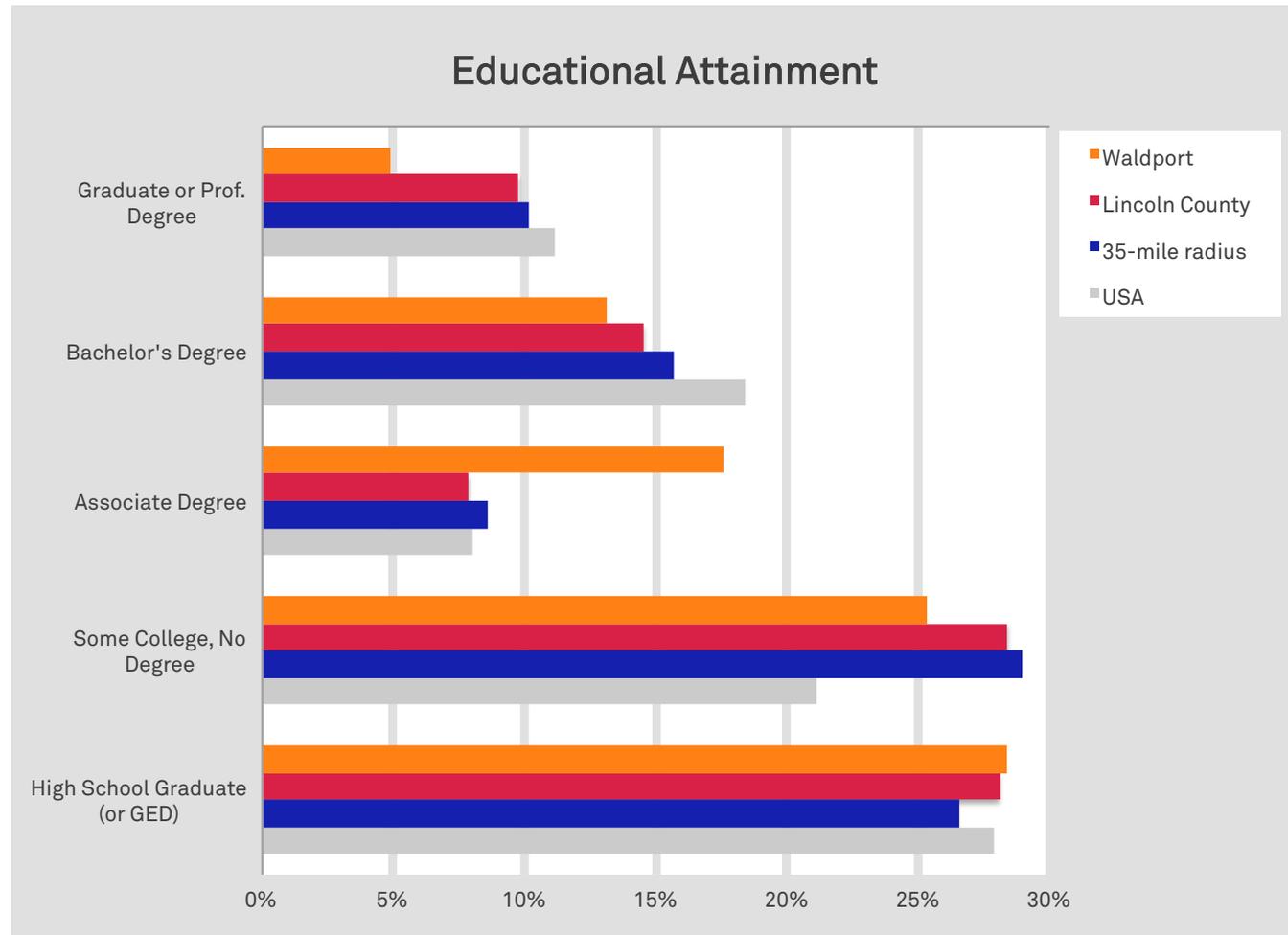
Market characteristics



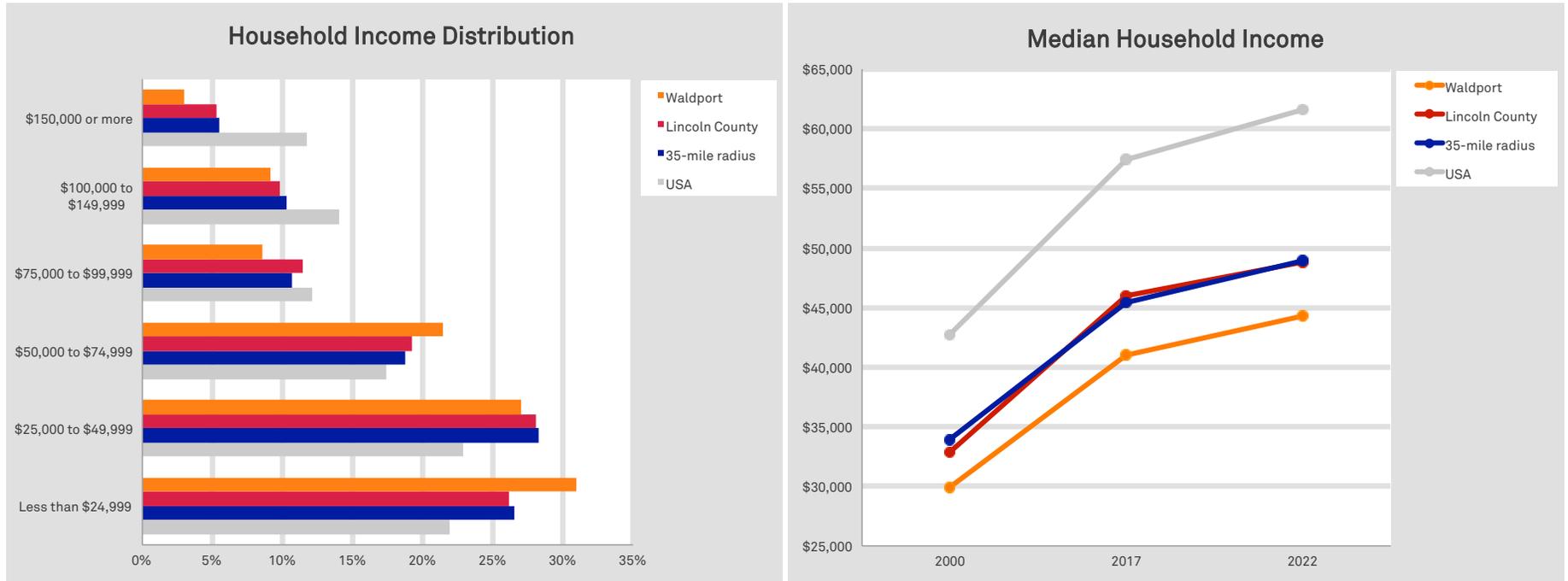
- * According to the Coordinated Population Forecast, Lincoln County has struggled with age-specific migration: between 2000 and 2010, large numbers of young adults left the county in search of employment and education. The elderly also left in order to be closer to family and medical facilities.
- * Looking at the charts above, we can see that, in Waldport, more than half of the population (52%) is age 55 or older, compared to only 28% of the US population. Similar numbers are found in the County and 35-mile radius, where 45% and 48% of the population are age 55 or older, respectively.
- * Although the Lincoln County population does skew slightly younger than the Waldport and 35-mile radius populations (17% of the population is age 17 or under compared to 15% in Waldport and 16% in the 35-mile radius), all three markets lag well behind national data, where 23% of the population is age 17 or under, 10% is between the ages of 18 and 24, and 13% is between the ages of 25 and 34.
- * Between 2017 and 2022, in all market segments, it is projected that the age 45 to 54 and age 55 to 64 populations will decrease while the age 65 to 74 population increases. The young adult populations are projected to either decrease or stay the same.

Market characteristics

- * There are low levels of educational attainment across the market.
- * Twenty-eight percent of Waldport's population has a high school diploma or GED, 25% has some college education but no degree, and 18% has an Associate Degree. Only 13% of the population has a Bachelor's degree and only 5% has a Graduate or professional degree.
- * The County and 35-mile radius populations differ slightly in that larger portions of the population have 'some college, no degree', Bachelor's degrees, or Graduate or professional degrees.



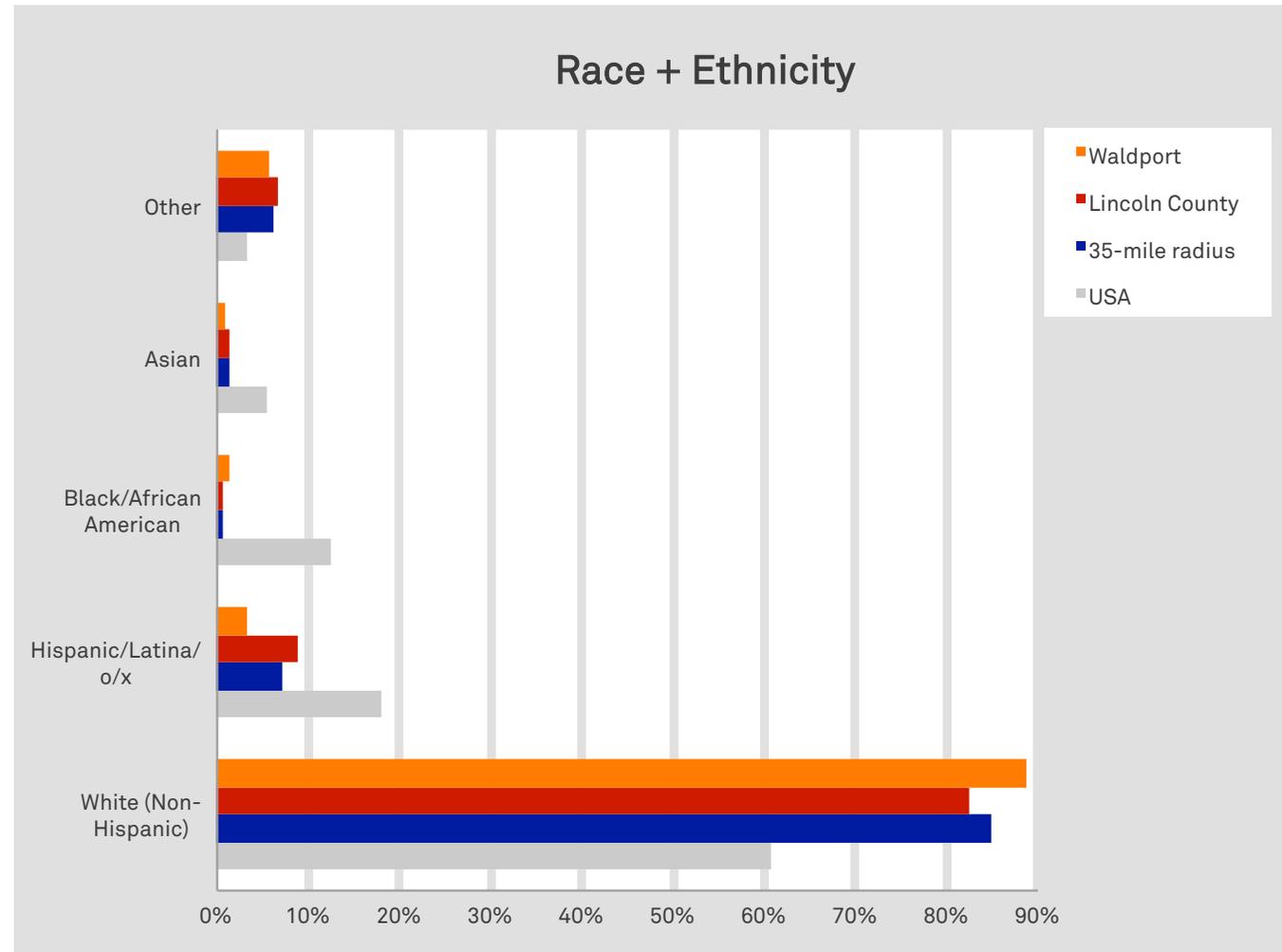
Market characteristics



- * In all three market segments, household income distribution is quite different from national data.
- * In Waldport, 31% of the population has a household income that is less than \$24,999, and 27% of the population has a household income between \$25,000 and \$49,999. Nationally, these numbers drop to 22% and 23%, respectively.
- * Regionally, there is more affluence. In the 35-mile radius, for example, 11% of the population has a household income between \$75,000 and \$99,999 (12% nationally), 10% has a household income between \$100,000 and \$149,999 (14% nationally), and 6% has a household income of \$150,000 or more (12% nationally). In the County, these numbers are similar.
- * Median household income in all market segments is much lower than in the nation but is projected to increase slightly from 2017 to 2022. Median household income is lowest in Waldport, where it is estimated to be \$41,011 in 2017.

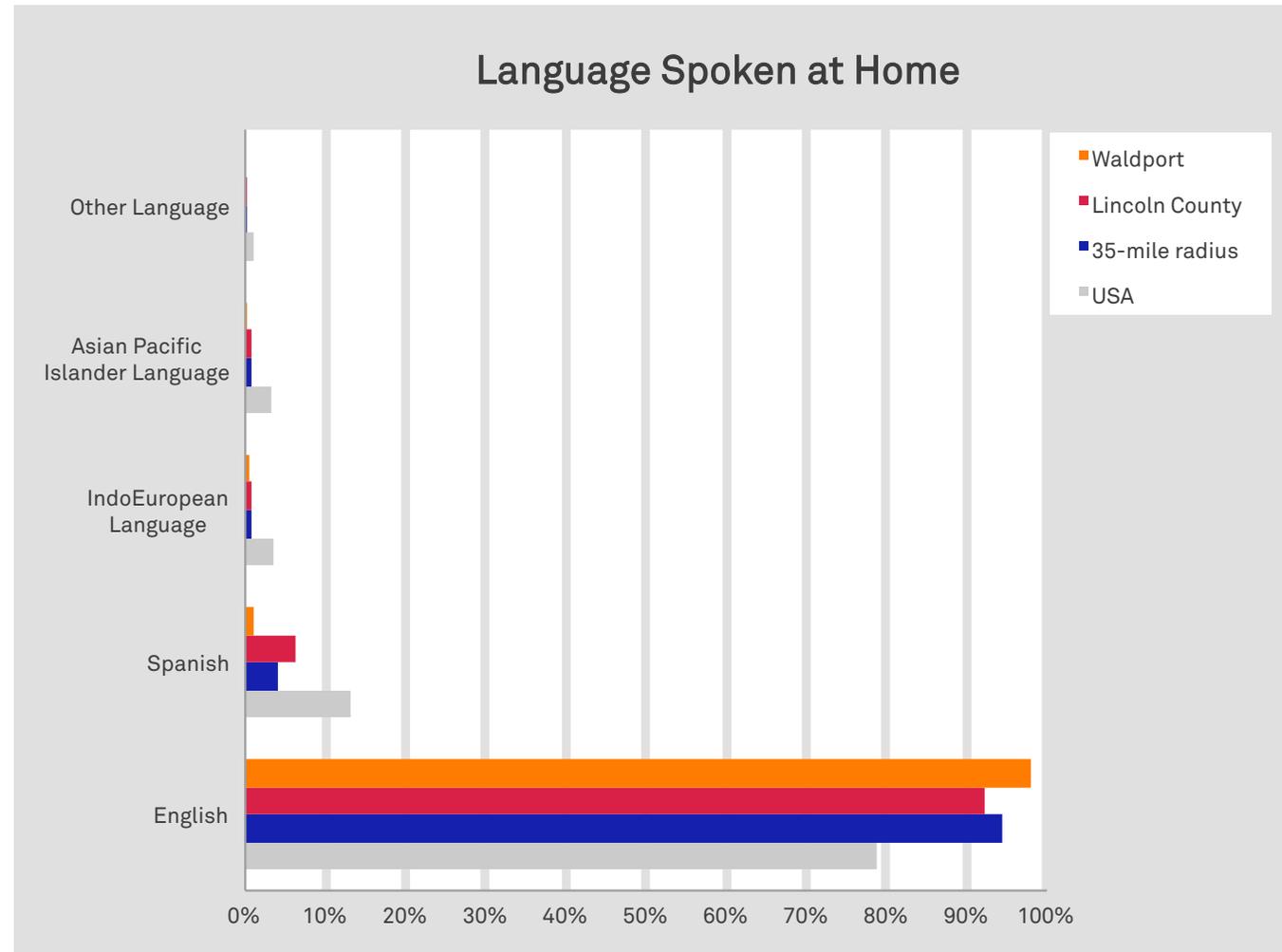
Market characteristics

- * Waldport, Lincoln County, and the 35-mile radius have a majority White population.
- * In Lincoln County, 9% of the population identifies as 'Hispanic/Latina/o/x' and 7% identifies as 'Other' (which includes 'American Indian and Alaska Native Alone' and 'Two or More Races').
- * In the 35-mile radius, 7% of the population identifies as 'Hispanic/Latina/o/x' and 6% identifies as 'Other'.
- * Only 3% of the Waldport population identifies as 'Hispanic/Latina/o/x'. Six percent identifies as 'Other'.



Market characteristics

- * English is the language spoken at home in more than 90% of households in each market segment.
- * In Lincoln County, 6% of the population speaks Spanish at home, as does 4% of the 35-mile radius population.



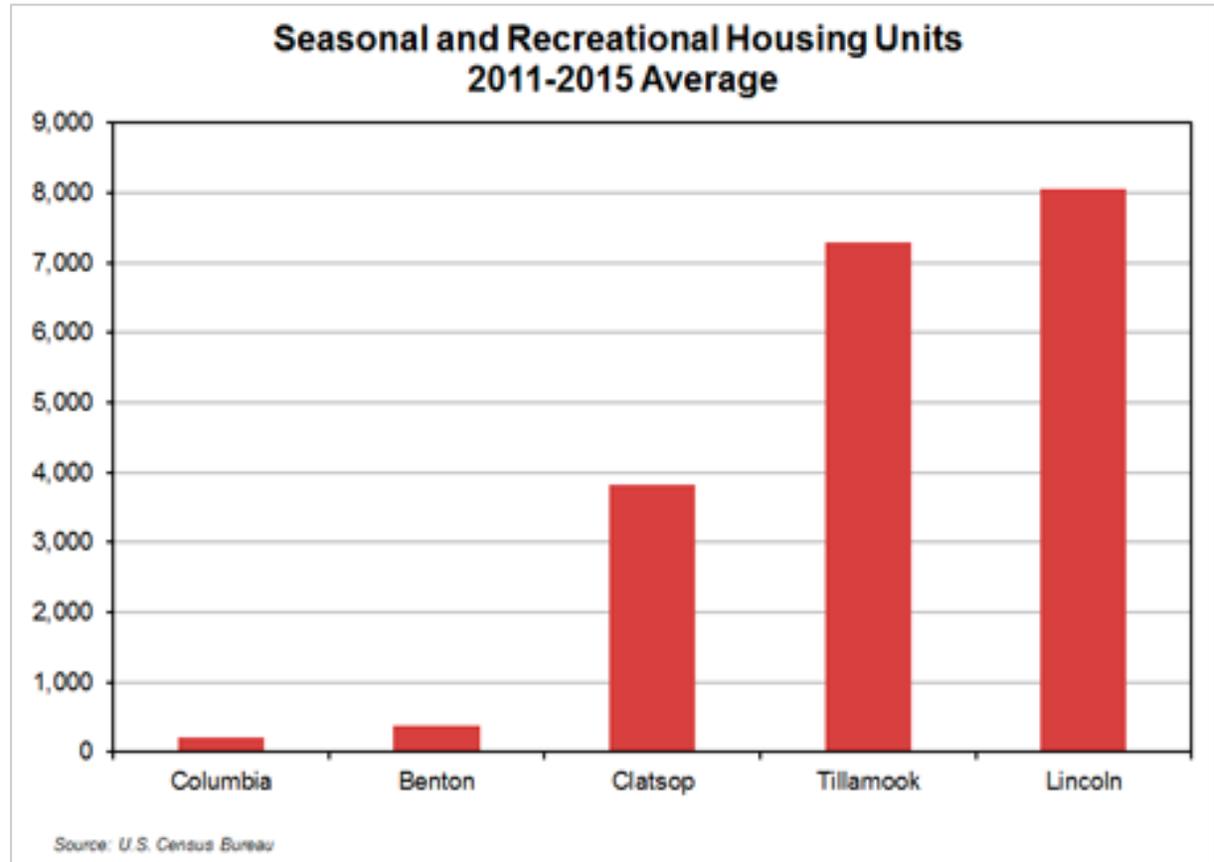
Housing + homelessness

- * Across the State of Oregon, there is an affordable housing crisis. In Lincoln County, the combination of high demand for coastal housing, a limited base of buildable land, and low wages has resulted in a small (but visible) homeless population.
- * The 2015 Point-in-Time Count, a national effort to count homeless people across the country, indicated that there were 54 homeless individuals living in Lincoln County. Of those, 29 were individually homeless and 25 were in families.
- * Comparatively, Lincoln County Schools estimated that, during the 2015-2016 school year, 772 students in the K-12 schools (14.5% of the student population) were homeless—the highest number in the county’s history.
- * The discrepancy between these numbers is largely a matter of semantics: for Lincoln County Schools, homelessness takes a broad definition, including students who are living in an emergency or transitional shelter; in a motel or hotel; in cars, campgrounds, RV parks, abandoned buildings, or an uninhabitable dwelling; with relatives or friends (including grandparents) due to economic hardship); and/or couch surfing.
- * Anecdotal research indicates that homelessness is a major worry within the community. Interviewees were concerned on two fronts: first, with spending money on an amphitheater when so many in the community are in need; and, second, that any open space in Waldport’s downtown would quickly become a homeless encampment, making it an unwelcome place for residents and visitors to spend time.

Sources: Lincoln County Schools Homeless Education + Literacy Project, “People who are homeless in Oregon’s coastal cities face special challenges” (The Oregonian, 10 Oct 2011), “Fast-growing Oregon considers historic renter-protection law” (Seattle Times, 5 May 2017), Homeless in Oregon 2015 Point in Time Count, At Home in Lincoln County 2.0 (Dec. 2012)

Part-time residents

- * Coastal Oregon has a significant seasonal resident population.
- * The image at right, taken from the article “Housing Vacancy in Northwest Oregon” on the State of Oregon Employment Department’s website, indicates that, on average, Lincoln County had the greatest number of vacant housing units due to seasonal, recreational, or occasional use between the years 2011 and 2015.
- * In Waldport, the 2010 Census estimated that 1,780 (29.2%) of the city’s 6,090 total housing units were for seasonal, recreational, or occasional use.



Tourists and tourism

- * South Lincoln County was selected to participate in Travel Oregon's **Rural Tourism Studio (RTS) Project** in 2012. The aim of the program was to encourage new tourism development activities that would stimulate job growth and revenue for public services, create business revenue, and open entrepreneurial opportunities. Preliminary research for RTS found that:
 - * Eighty-seven percent of the municipal budget in the City of Yachats was comprised of revenue from local lodging tax. In Waldport, tourism supported just one-half of a percent of the municipal budget.
 - * The tourism industry is heavily supported by volunteerism.
 - * Prior to the RTS study, there had been very little formal tourism planning in South Lincoln County.
 - * South Lincoln County has a number of unique and natural assets and well-established community events. Yachats is known as the "artsy" community, while tourism activity in Waldport is connected to fishing and boating.



Tourists and tourism

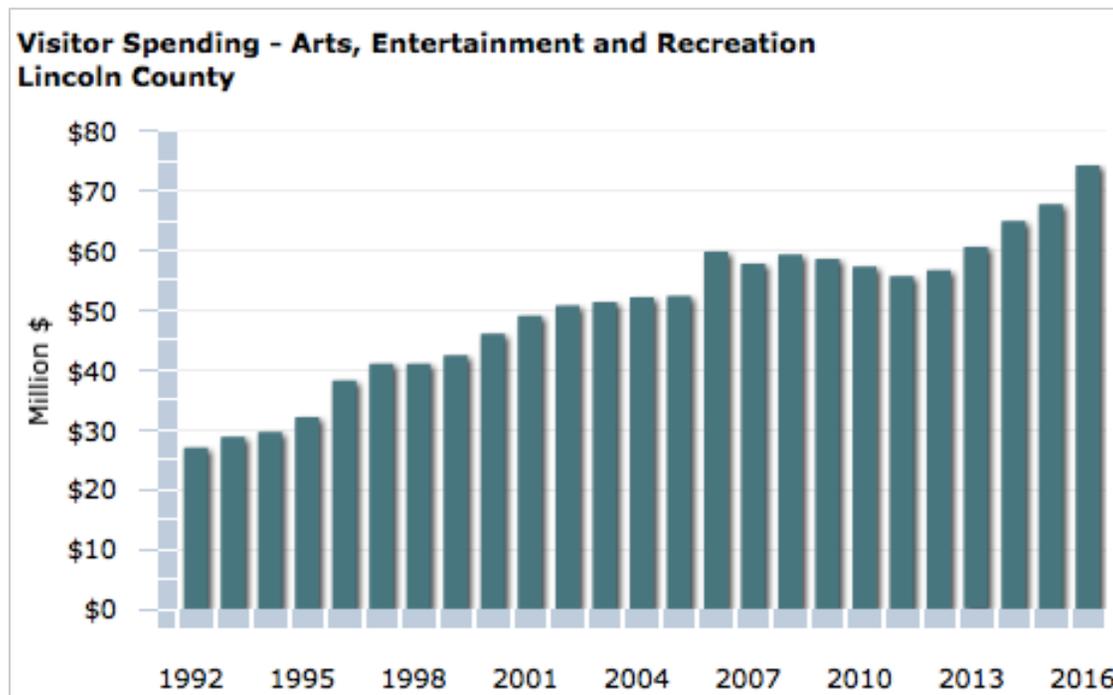
- * In 2015, Longwoods International created a **Regional Visitor Report for Oregon's Coast Region** (defined as the length of the Oregon coast). It found the following:
 - * Of the 33.1 million overnight trips made to Oregon in 2015, 10.3 million (31%) included time spent in the Coast Region.
 - * The majority of overnight visitors (76%) were adults and 24% were children. Sixty-seven percent travelled for leisure, 30% were visiting friends/relatives, and 3% were on business.
 - * In total, overnight visitors to the Coast Region spent \$1.8 billion. Visitors spent the most on lodging (\$715 million) and restaurant food/beverages (\$447 million).
 - * Per person, visitors spent an average of \$53 on lodging, \$33 on restaurant food/beverages, \$19 on retail, \$14 on transportation at the destination, and \$12 on recreation/sightseeing/entertainment. When looked at separately, leisure visitors spend slightly more per person: \$61 on lodging, \$37 on restaurant food/beverages, \$22 on retail, \$17 on recreation/sightseeing/entertainment, and \$13 on transportation at destination.
 - * For leisure travelers, the main purpose of their trip was touring (27%), the outdoors (23%), or to visit a resort (22%).
 - * Fifty-seven percent of coastal visitors traveled from within Oregon and 21% traveled from Washington. Primarily, they visited between July and September (30%) or April and June (27%). Many (83%) had visited the Coast Region at least once before.
 - * The average total nights away from home for leisure visitors to the Coast Region was 3.5 nights, slightly fewer than the 4.3 nights of the average Oregon visitor. Most visitors, however, only spent an average of 2.5 nights in the Coast Region specifically.
 - * Fifty-nine percent of coastal visitors experienced the beach/waterfront; 14% visited museums, 7% visited art galleries, 3% visited the theater, and 2% attended a rock/pop concert.
 - * Visitors to the coast were largely white, female, had an average age of 47 and an average household income of \$61.5 thousand, were married with a partner, had no children under 18, and were college-educated. Forty-two percent of visitors in 2015 were working full-time/self-employed and 47% were not employed/retired/other.



Tourists and tourism

* Additionally, Dean Runyan Associates released **Oregon Travel Impacts: 1992-2015p** in May 2016, providing detailed statewide, regional, and county travel impact estimates for the state. Overall, research indicated that the travel industry continued to grow in 2015 at a rapid rate.

* In the state, visitation and spending has increased by 3% each year since 2010. Direct travel spending in 2015 reached \$10.8 billion. Spending on arts, entertainment, and recreation reached \$1 million.



* This report considered spending specifically in the Central Coast, defined as Douglas (west), Lincoln, and Lane (west) counties. It estimates that visitors spent a total of \$717 million in the Central Coast in 2015, an increase of 4.3% over 2014's \$688 million. Of that, a total of \$95 million was spent on arts, entertainment, and recreation. All of this spending resulted in 5,570 jobs in the Accommodations + Food Services industry and 1,620 jobs in Arts, Entertainment + Recreation.

* In Lincoln County, visitors spent a total of \$529 million, an increase of 4.4% over 2014's \$507 million. Of that, \$67.7 million was spent on arts, entertainment, and recreation. By industry, visitor spending resulted in 950 jobs in Arts, Entertainment + Recreation and \$19 million in industry earnings.



Market conclusions

- * The market for the arts in Waldport is challenging. A small and aging population, there are low levels of educational attainment (the number one indicator of participation in the arts) and lower levels of affluence. While this indicates some opportunity for hands-on programs, the market for traditional performing arts (dance, ballet, symphonic music, and so on) is limited.
- * Tourism along the coast has been growing. Most visitors are middle-aged and no longer have children under the age of 18 at home. Nearly 50% are retired and many are college educated. Typically, visitors spend less than \$20 on recreation/sightseeing/entertainment; although, in Lincoln County specifically, total spending on arts, entertainment, and recreation is increasing. Nevertheless, visitors are primarily traveling to the coast for recreational purposes. In Waldport, for example, qualitative and quantitative research indicates that visitors partake in boating and fishing.



User demand + potential partners



User demand

Overview

Over the course of this study, we gathered information on potential demand for an amphitheater from various types of organizations, including local and regional arts and cultural groups.

Methodology

To assess demand, we worked with City leadership and interviewees to identify a number of community groups, educators, and other organizations that might have demand for space. We interviewed each of these groups to understand their facility needs in terms of size, functionality, and potential levels of use.



User demand

- * The chart below indicates potential user demand for an amphitheater. In total, three users indicated 24 days of demand for an amphitheater with 100 to 400 seats. They are:
 - * **Waldport High School:** Waldport High School leadership feels that the addition of a cultural space like an amphitheater would greatly benefit the community’s younger demographic. The School could imagine using an amphitheater six times a year for band performances and drama productions. Leadership could also imagine using the space one day a year for graduation.
 - * **Beachcomber Days:** Beachcomber Days is a 65-year-old Waldport tradition. The festival takes place over three days, activating the town with live music, vendors, rides, street dances, fire dances, outdoor movies, kite flying, a parade, and more. Last year, 2,000 people attended. Currently, Beachcomber Days uses four different stages for events. An amphitheater could serve as one of those stages.
 - * **One of Us Productions:** One of Us Productions is a nonprofit community theater that performs at Yachats Commons. Their ideal outdoor performance venue would be scalable, with a capacity of 100. The organization could imagine using such a space for a partial or entire run of a late summer show.

User Demand for a Waldport Amphitheater					
	Days of Use				Estimated Capacity
	Performances	Rehearsals /Tech	Other	Total	
Waldport High School	6	7	1	14	400
Beachcomber Days	3	-	-	3	100
One of Us Productions	3	4	-	7	100
Total Days of Use	12	11	1	24	-

User demand

- * When asked about interest in using an amphitheater, the majority of potential users were concerned about the weather.
- * Beyond demand for an outdoor performance space, however, interviewees expressed interest in the following:
 - * Community gathering space;
 - * A playground;
 - * A park with a pavilion and barbecue pits;
 - * Outdoor recreational spaces (handball or basketball courts, for example); and,
 - * A revamped port.



Touring entertainment

- * In order to understand the potential for an amphitheater in Waldport to attract touring entertainment, we spoke with Polly Plumb Productions, a Yachats-based nonprofit formed to “produce diverse, artistic, colorful, whimsical, musical, and intelligent arts and cultural programming”. Polly Plumb is responsible for presenting events at Yachats Commons and for producing the Rainspout Festival, a three day festival featuring music, workshops, jam sessions, a children’s show, dining, and dancing.
- * The organization cautioned that the challenge in Waldport would not be attracting talent, but, rather, attracting the audiences to make an amphitheater financially viable. Major challenges cited by the organization included the abundance of free music programming that is currently available to concertgoers and the large fees charged by organizations like the American Society of Composers, Authors, and Publishers (ASCAP) and Broadcast Music Inc. (BMI). In fact, it is because of these challenges that Polly Plumb has decided to restructure the Rainspout Festival for next year.
- * An opportunity that might exist, as was suggested, is a major festival along the likes of Seattle Folk Fest or Bumbershoot—something that could take place in the off-season when there is more hotel and rental property availability.



Potential partners: seashore family literacy

- * For more than 20 years, Seashore Family Literacy has been serving the community of Waldport through free, education-based and community-focused programming.
- * Currently, the organization operates out of three facilities, one of which is located adjacent to the former Waldport High School site. This facility, **Shelter Me Center for Learning**, is comprised of the former Waldport Middle School cafeteria and gymnasium/auditorium and is used for a summer youth camp, Saturday breakfasts and a summer meal program, weekly community dinners, a clothing closet, professional development programs, and more. To date, the cafeteria portion of the facility has been restored and is fully functional. The gymnasium/auditorium, however, is in need of considerable work.
- * Shelter Me is a hub of community activity. It is staffed by an army of volunteers, provides programs to all facets of the community, and has a range of local, regional, and state-wide partners. This, in addition to its proximity to the open site and readily available amenities (the community garden, large kitchen, indoor stage, and open gathering space, for example), makes it an important player in planning for the future.



Potential partners: waldport high school's coastal tourism + marketing career pathway program

- * Waldport High School has a thriving Coastal Tourism and Marketing Career Pathway program. Through it, students earn tourism industry certifications, create nature podcasts, participate in wetland habitat restoration, and manage an eco-friendly kayak rental business. And, this year, Language Arts students had the opportunity to attend the Northwest Travel Writers Conference, sharing articles they had written about tourism on the coast.
- * The aim of the program is to establish an entrepreneurial spirit in students, teaching them to identify and create their own jobs while being responsive to the needs of the community.
- * Developing a partnership with Waldport High School and this Coastal Tourism and Marketing Career Pathway program would create a unique opportunity to activate the former Waldport High School site with nature programming and demonstrations.



Potential partners: The Confederated Tribes of Siletz Indians

- * The Confederated Tribes of Siletz Indians is a federally recognized confederation of 27 bands that originally inhabited lands extending from Northern California to Southern Washington. Today, the Tribe operates as a sovereign nation with a 3,666-acre reservation in Lincoln County.
- * With the recent spotlight on wetland issues and newly instated floodplain regulations, the Tribe has recognized an opportunity to get involved with smaller local governments in Lincoln, Tillamook, and Douglas Counties. While there are previous examples of partnerships between the Tribe and larger local governments, there has yet to be an opportunity to work with communities like Waldport on issues impacting the coast.
- * One opportunity that has been identified by the Tribe's Natural Resources Department involves working with local governments to develop desirable options for communities confronted with floodplain or wetland development needs; the repurposing of a floodplain or wetland to an improved use type when development is not an option; and/or the implementation of simple conservation, restoration, and enhancement projects that both parties could support.
- * It is believed, however, that these options represent only a small portion of potential partnership opportunities and that the former Waldport High School site could be a viable testing ground for developing a working relationship.



Summary of user demand

- * There is limited demand for an amphitheater in Waldport. In total, three users indicated demand for 24 days of use: 12 days for performances, 11 days for rehearsals/tech, and one day for Waldport High School's graduation.
- * There is, however, interest in a community gathering and recreational space.
- * Local presenters believe that attracting touring product to Waldport would be easy; however, there is concern that the market is unable to support an outdoor facility. It was suggested that an alternative option for the community would be the development of a major, regional festival during the off-season.
- * Finally, there are three strong partners that could play a significant role in activating the former high school site: Seashore Family Literacy, Waldport High School's Coastal Tourism and Marketing Career Pathway program, and the Confederated Tribes of Siletz Indians.



Existing facilities



Existing facilities

Overview

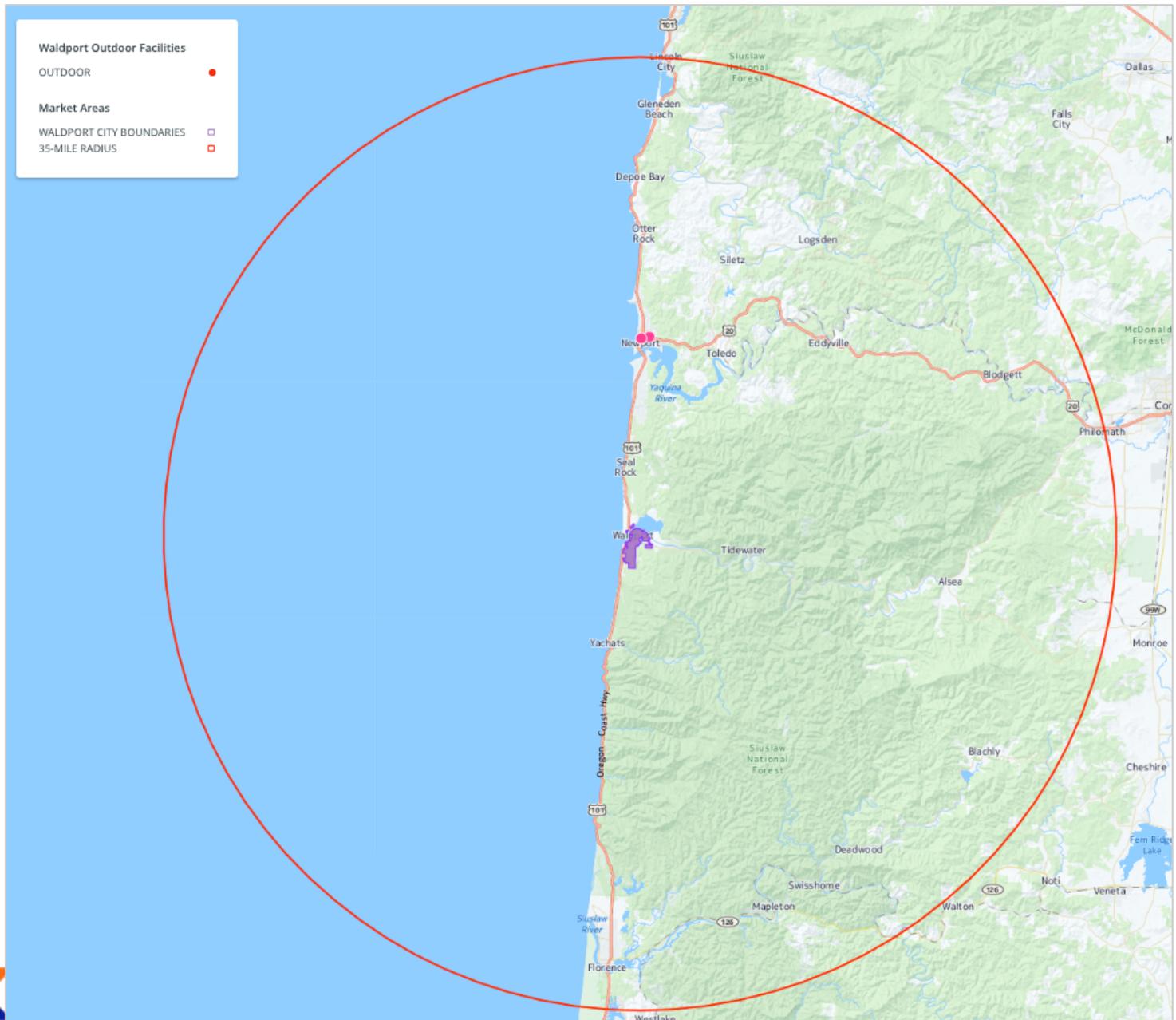
In order to assess the competitive situation for an amphitheater in Waldport, we developed two inventories: the first, of outdoor performance facilities; and, the second, of indoor facilities that are used four or more times a year for live performances.

Methodology

- * Both inventories consider the physical features and amenities, as well as the types of activities hosted, at outdoor and indoor facilities within a 35-mile radius of the former Waldport High School site.
- * In addition, the condition and functionality of each facility has been rated using eight variables. They include:
 - * Facility condition,
 - * Staff and support,
 - * Theatrical functionality,
 - * Acoustics,
 - * Customer amenities,
 - * User amenities,
 - * Atmosphere/character, and
 - * Suitability for users.
- * Variables are rated on a scale of 1 to 4, with the higher score being better. The 'facility condition' and 'staff and support' categories carry the most weight.
- * Some facilities were visited in person, while other ratings are self reported by facility managers or based on anecdotal information and interview input. Because of that, this exercise is somewhat subjective, but nonetheless provides a good basis for comparison.



Outdoor facilities



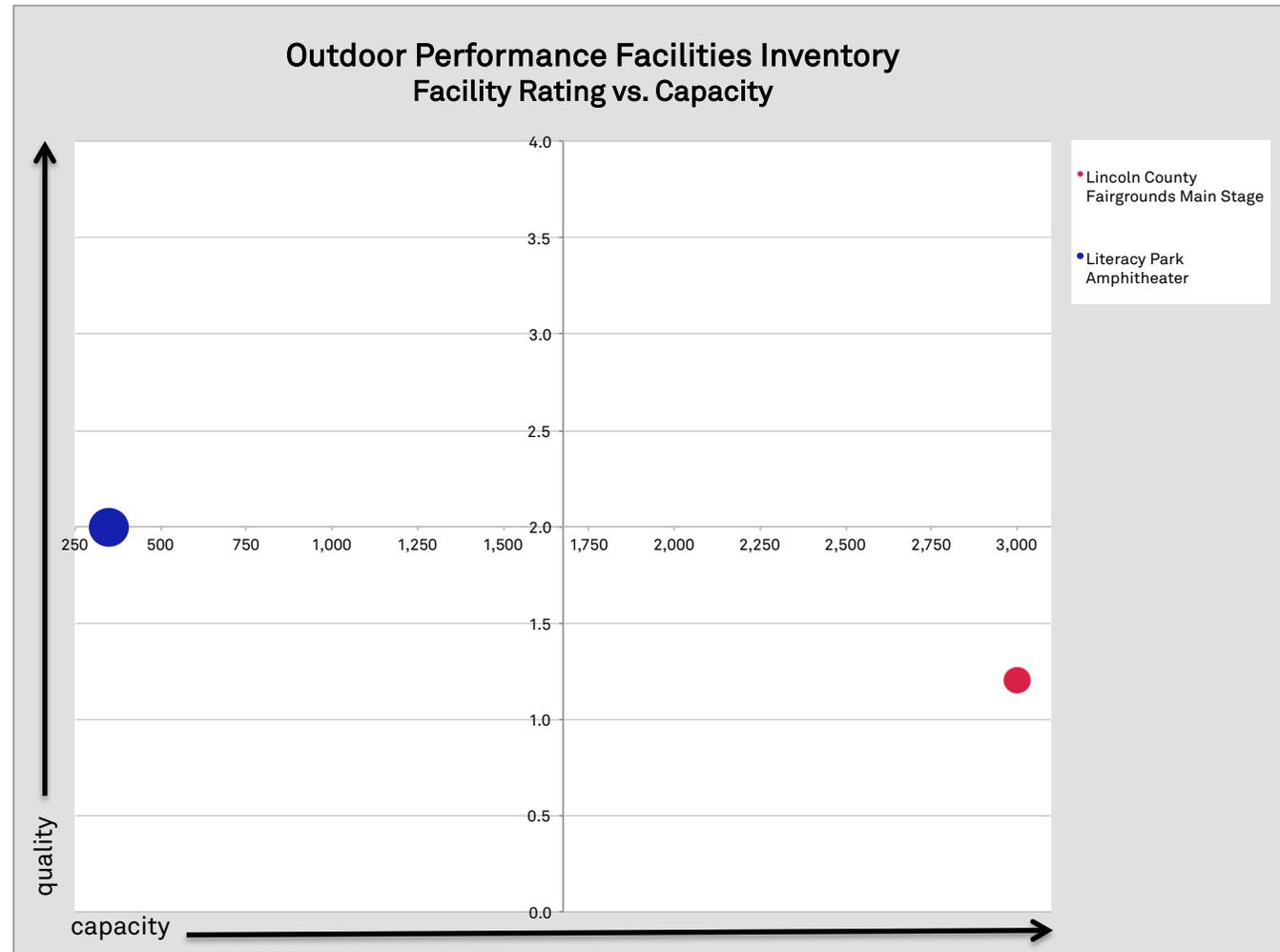
Outdoor facilities

- * There are only two outdoor performance facilities within 35 miles of the former Waldport High School site: the Main Stage at Lincoln County Fairgrounds and Newport's Literacy Park Amphitheater. Neither of these spaces are heavily programmed. The Main Stage, for example, is used during the fair for concerts, while Literacy Park Amphitheater is used throughout the summer for a children's reading series. The reading series is often accompanied by short performances and occasionally a local arts group will rent the space for a performance.
- * Both of these facilities are fairly basic and lack most of the features and amenities that would be found at a larger amphitheater (covered seating, technical equipment, concessions, ticketing services, etc.).
- * They have high availability, meaning they are open for use on most prime days (Thursday, Friday, and Saturday evenings).
- * As a note, Lincoln County Fairgrounds recently completed a master plan, which includes a covered outdoor space. This space, however, is planned to be oriented towards outdoor festivals and events rather than concerts.



Outdoor facilities

- * Here, we have used the quality rating and capacity of each facility to plot them on a graph. The size of each circle correlates to the number of types of activities each facility accommodates.
- * From this, we can see that both facilities are low in quality, and that they are disparate in size.
- * This indicates a large gap for a high quality amphitheater at any capacity.



But what about the weather?

- * Weather on the coast can be wet, windy, and cool. While the majority of interviewees liked the *idea* of an amphitheater project, they had serious concerns about the coastal climate.
- * The chart below highlights average weather trends, by month, for the City of Waldport. From June through September, the months in which an amphitheater would most likely be used, the average temperature is in the 60s. Precipitation fluctuates, with an average of 2.82 inches in June, less than an inch in July and August, and 1.91 inches in September.

Waldport, OR Weather: Monthly Averages & Records - °F						
	<i>Average Low</i>	<i>Average High</i>	<i>Record Low</i>	<i>Record High</i>	<i>Average Precipitation</i>	<i>Average Snow</i>
January	40°	52°	11° (1957)	69° (1981)	10.41"	0.1"
February	40°	53°	12° (1989)	77° (1968)	7.99"	0.2"
March	41°	54°	22° (1955)	77° (2005)	7.75"	0"
April	42°	56°	23° (1987)	88° (1947)	4.71"	0"
May	46°	59°	30° (1954)	91° (1947)	3.56"	0"
June	50°	62°	33° (1933)	94° (1995)	2.82"	0"
July	52°	65°	33° (1985)	100° (1961)	0.83"	0"
August	52°	65°	37° (1986)	98° (2002)	0.82"	0"
September	49°	65°	32° (1972)	96° (1994)	1.91"	0"
October	46°	61°	25° (1971)	94° (1991)	5.23"	0"
November	42°	55°	18° (1985)	79° (1962)	10.65"	0"
December	39°	51°	1° (1972)	69° (1980)	10.82"	0.1"

Source: *Intellicast.com*



Performance Facilities Inventory: Waldport, OR

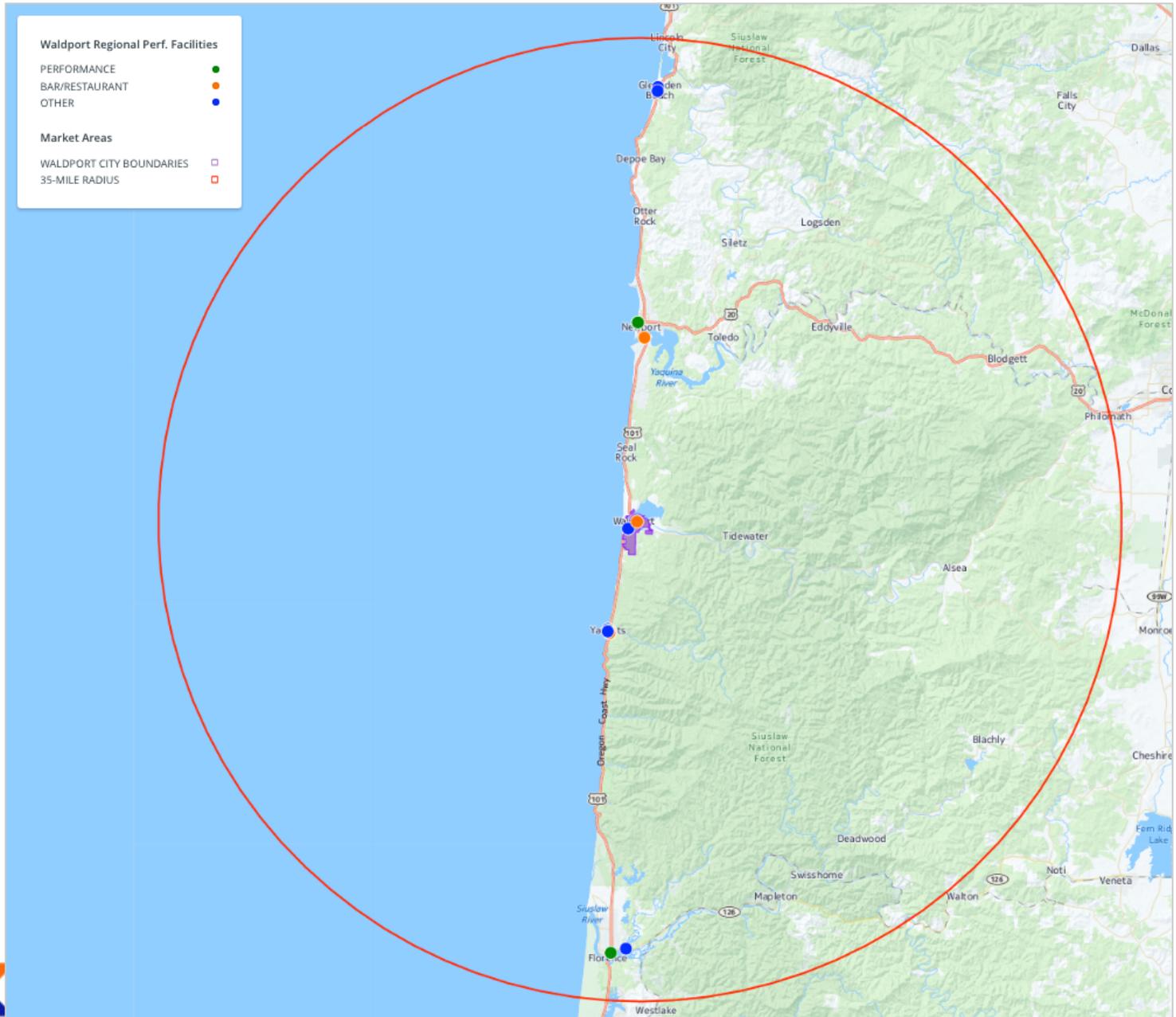
Indoor performance facilities within 35 miles of the former Waldport High School site.

Type	Facility	Capacity	Event Types Supported	Facility Rating								Rating	Facility Features																		
				Facility Condition	Staff and Support	Theatrical Functionality	Acoustics	Customer Amenities	User Amenities	Atmosphere/Character	Suitability for Users		Flexible Seating	Kitchen Facilities	Rehearsal/Program Space	Wing Space	Orchestra Pit	Fly Space	Alcohol Permit	Dedicated Parking	Café/Restaurant	ADA Accessible	Lighting Equipment	Sound Equipment	Film/Projection Equipment	Ticketing Services	Not Available	Low	Medium	High	
Local	Other	Waldport High School Auditorium	435	1	3	1	2	1	1	1	1	2	1.6	100%	100%	0%	0%	0%	0%	50%	100%	50%	###	50%	50%	0%	0%	50%	0%	50%	0%
	Bar/Restaurant	Hilltop Bistro Café*	50	1	2	1	1	1	2	1	1	1	1.3	100%	100%	0%	0%	0%	0%	50%	100%	50%	###	50%	50%	0%	0%	50%	0%	50%	0%
Regional	Other	Three Rivers Casino Florence	700	4	3	3	2	2	4	2	2	2	2.6	100%	100%	42%	17%	17%	17%	50%	83%	33%	58%	50%	58%	42%	33%	17%	33%	25%	25%
	Performance	Florence Events Center: The FEC Theatre	455	1	3	1	4	3	3	3	3	4	2.8	100%	100%	42%	17%	17%	17%	50%	83%	33%	58%	50%	58%	42%	33%	17%	33%	25%	25%
	Performance	Newport Performing Arts Center: Alice Silverman Theatre	380	4	4	3	4	4	3	3	4	4	3.6	100%	100%	42%	17%	17%	17%	50%	83%	33%	58%	50%	58%	42%	33%	17%	33%	25%	25%
	Other	Gleneden Beach Community Club*	300	1	2	1	1	2	2	1	2	2	1.6	100%	100%	42%	17%	17%	17%	50%	83%	33%	58%	50%	58%	42%	33%	17%	33%	25%	25%
	Other	Yachats Community Presbyterian Church	242	1	3	2	2	3	3	2	3	2	2.5	100%	100%	42%	17%	17%	17%	50%	83%	33%	58%	50%	58%	42%	33%	17%	33%	25%	25%
	Performance	Yachats Commons: Multipurpose Room	225	1	3	1	2	1	2	1	2	2	1.8	100%	100%	42%	17%	17%	17%	50%	83%	33%	58%	50%	58%	42%	33%	17%	33%	25%	25%
	Bar/Restaurant	Rogue Ale's Brewers on the Bay*	200	2	2	1	1	1	2	1	3	1	1.5	100%	100%	42%	17%	17%	17%	50%	83%	33%	58%	50%	58%	42%	33%	17%	33%	25%	25%
	Other	Eden Hall	200	2	3	1	3	2	2	2	3	3	2.3	100%	100%	42%	17%	17%	17%	50%	83%	33%	58%	50%	58%	42%	33%	17%	33%	25%	25%
	Performance	Newport Performing Arts Center: Studio Theatre	80	1	3	3	2	2	3	3	3	3	2.8	100%	100%	42%	17%	17%	17%	50%	83%	33%	58%	50%	58%	42%	33%	17%	33%	25%	25%
	Bar/Restaurant	The Drift Inn Restaurant + Café	75	2	2	1	1	1	2	1	2	1	1.4	100%	100%	42%	17%	17%	17%	50%	83%	33%	58%	50%	58%	42%	33%	17%	33%	25%	25%
Bar/Restaurant	Yachats Underground Pub + Grub	30	1	2	1	1	1	2	1	1	1	1.3	100%	100%	42%	17%	17%	17%	50%	83%	33%	58%	50%	58%	42%	33%	17%	33%	25%	25%	
Other	Little Log Church + Museum	30	4	3	1	1	2	1	1	2	1	1.6	100%	100%	42%	17%	17%	17%	50%	83%	33%	58%	50%	58%	42%	33%	17%	33%	25%	25%	
											Combined:	64%	93%	36%	14%	14%	14%	50%	86%	36%	64%	50%	57%	36%	29%	21%	29%	29%	21%		

*Facility capacity is estimated.



Indoor facilities



Indoor facilities

Presenting + Producing Activity

- * Locally and regionally, music is the most commonly presented activity type. One facility in Waldport—Hilltop Bistro Café—presents music, compared to six in the larger region.
- * Florence’s Three Rivers Casino is the only facility presenting headliner/popular music and comedy.
- * None of the inventoried facilities are presenting dance, family entertainment, culturally-specific performances, or live, professional theatre or opera (although Newport Performing Arts Center does screen The Met Live in HD and National Theatre Live).
- * Very few facilities produce cultural programming, although many are rented by local arts and cultural organizations.
- * Four facilities rent to promoters and almost all of them are available for private events.

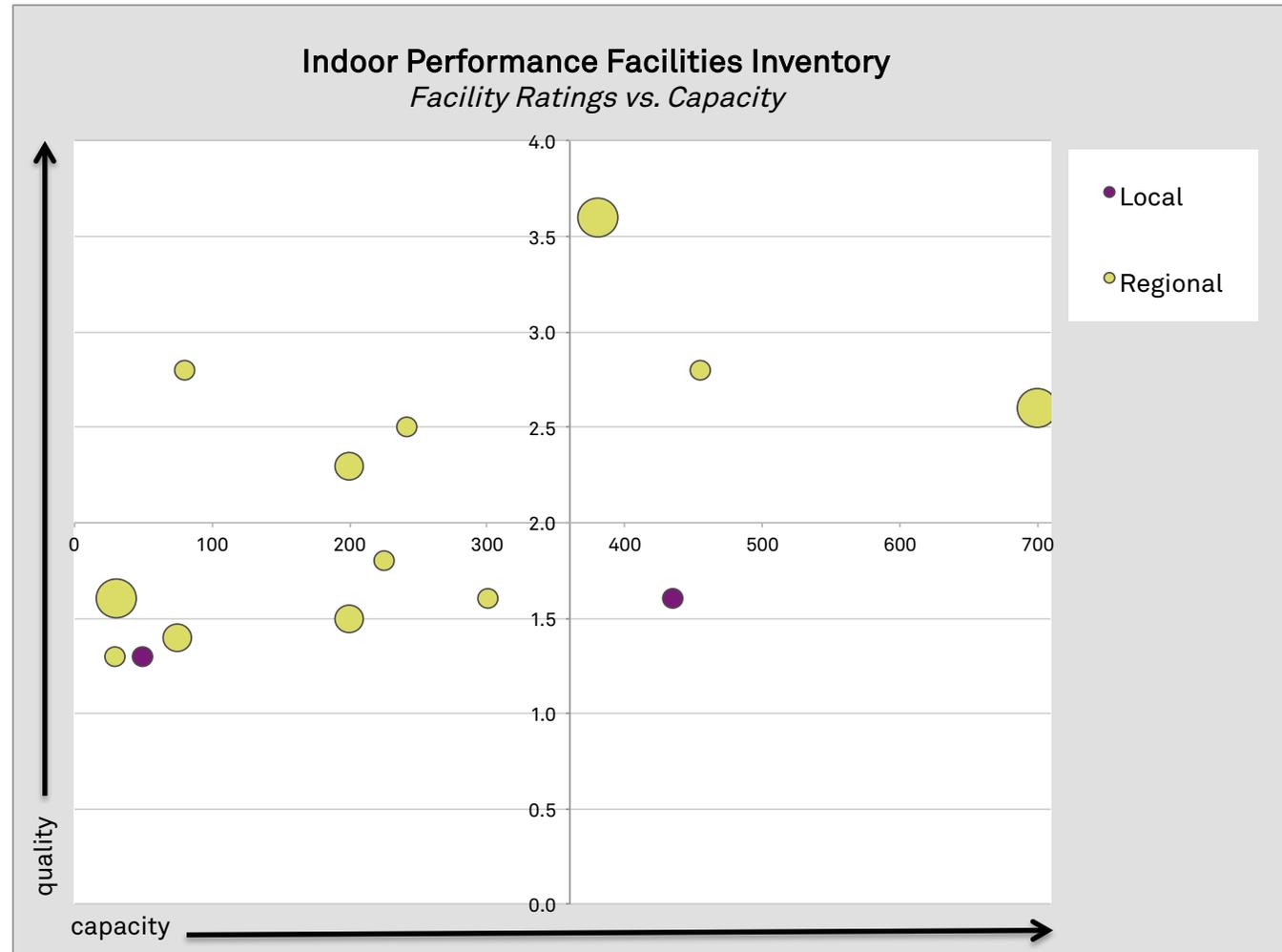
Features + Amenities

- * More than half of the inventoried facilities have flexible seating and/or kitchen facilities. Only two (Florence Events Center’s The FEC Theatre and Newport Performing Arts Center’s Alice Silverman Theatre), however, have wing space, an orchestra pit, or fly space.
- * Facilities vary in the amenities that are offered. For example, 58% of the inventoried facilities have sound equipment, but only 42% have film or projection equipment. Eighty-three percent have dedicated parking, but only 64% are ADA accessible.



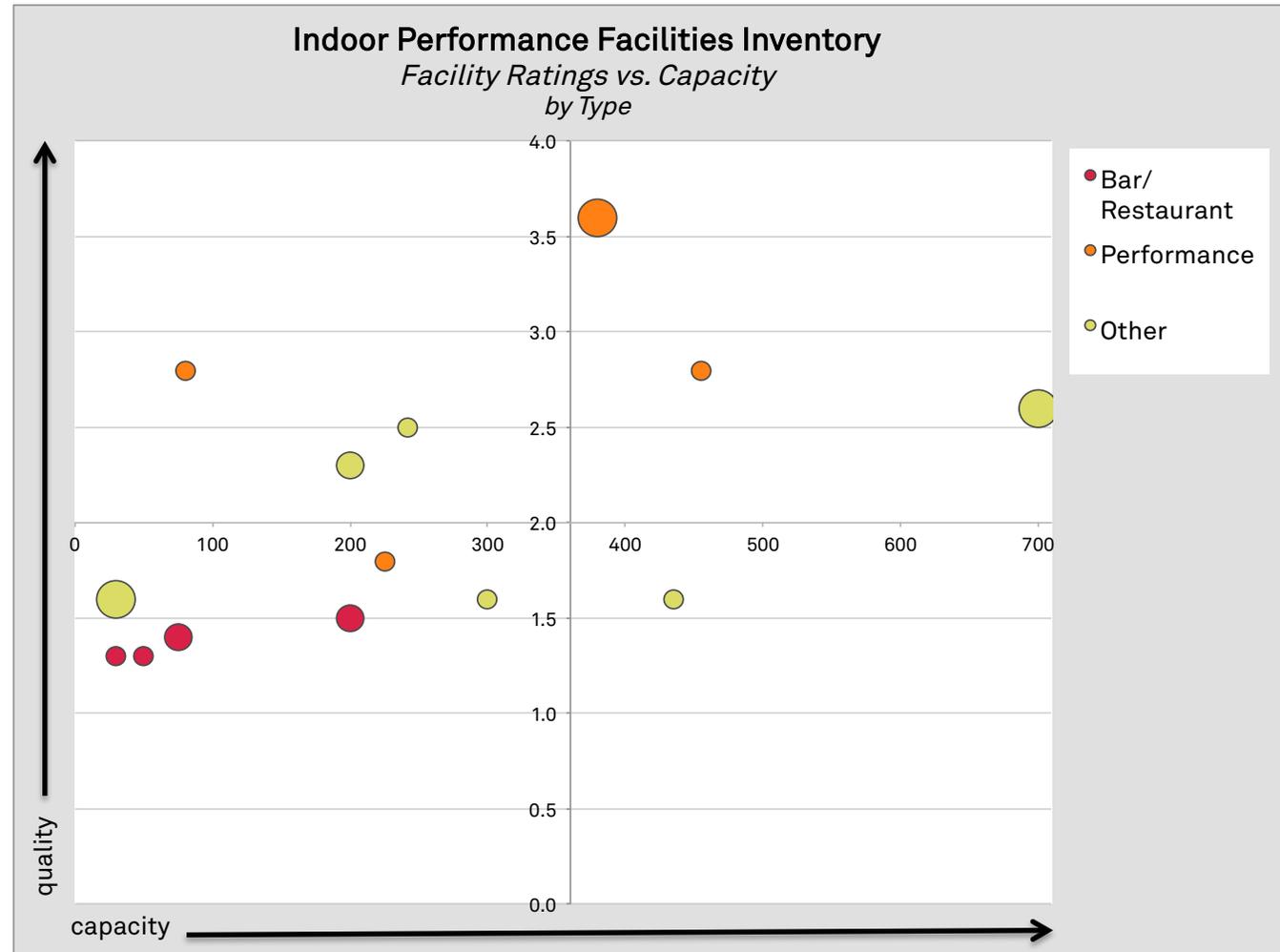
Indoor facilities

- * As with the Outdoor Performance Facilities Inventory, we have used the quality rating and capacity of each indoor performance venue to create a matrix. Here again, the size of each circle correlates with the number of activity types the facility supports.
- * The matrix indicates that local and regional performance venues cover a range of capacities, but vary greatly in quality. The majority of facilities, however, have a capacity smaller than 300 and a quality rating below 2.5.
- * Waldport's facilities both have a quality rating below 2.0.



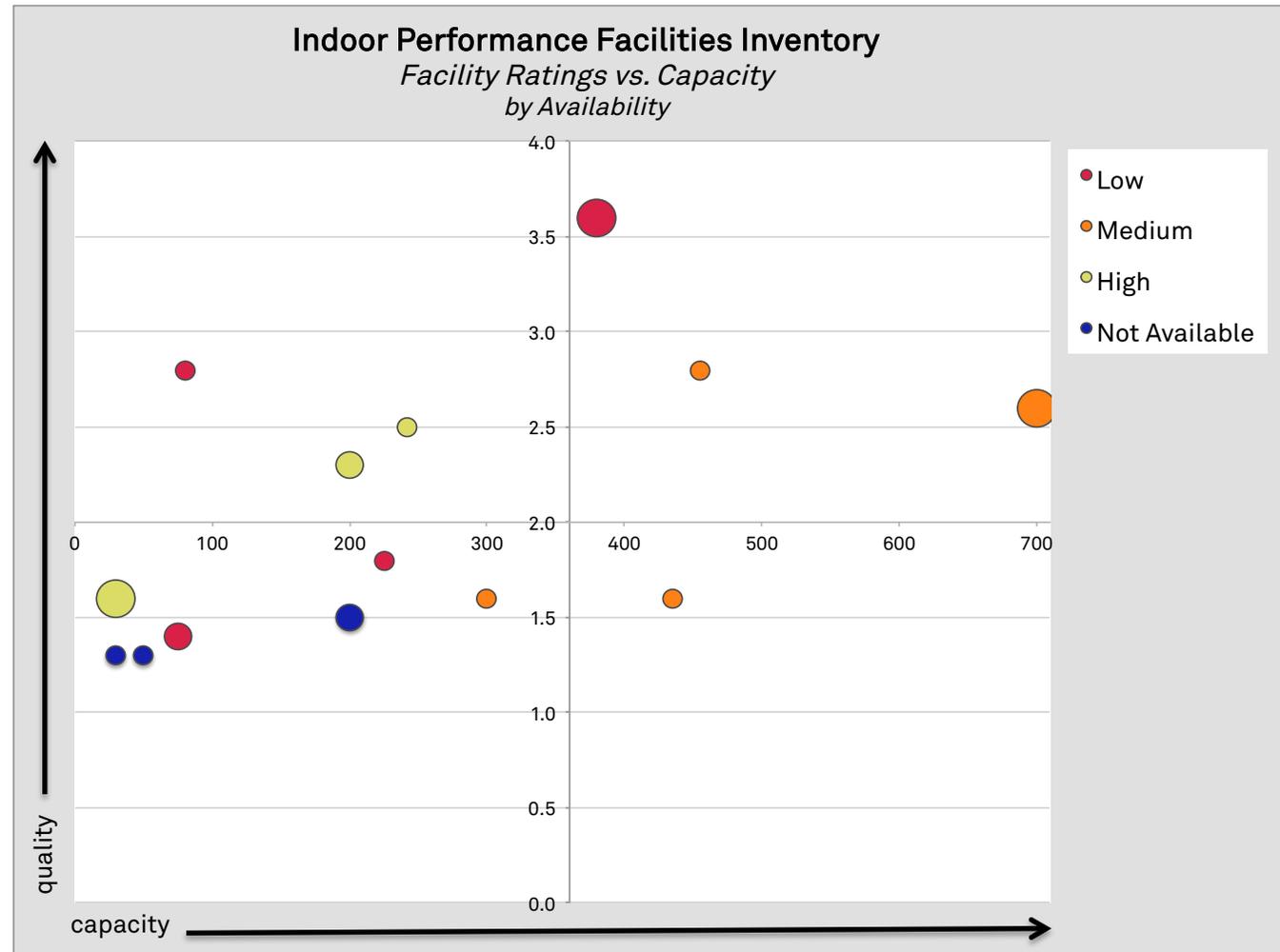
Indoor facilities

- * In this matrix, the facilities have been colored according to their type.
- * “Other” facilities include the Waldport High School Auditorium, Three Rivers Casino, churches, and community or event spaces.
- * Four of the inventoried facilities are bars or restaurants and four are purpose-built performance spaces.
- * These purpose-built performance spaces are higher in quality than the other inventoried facilities but support fewer activity types.



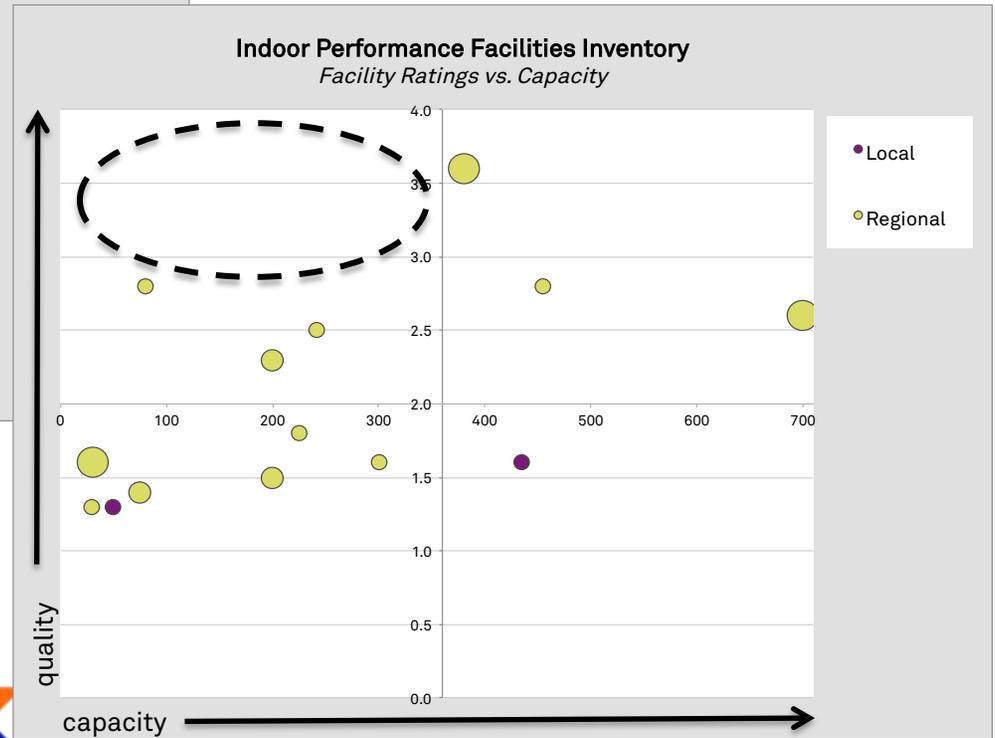
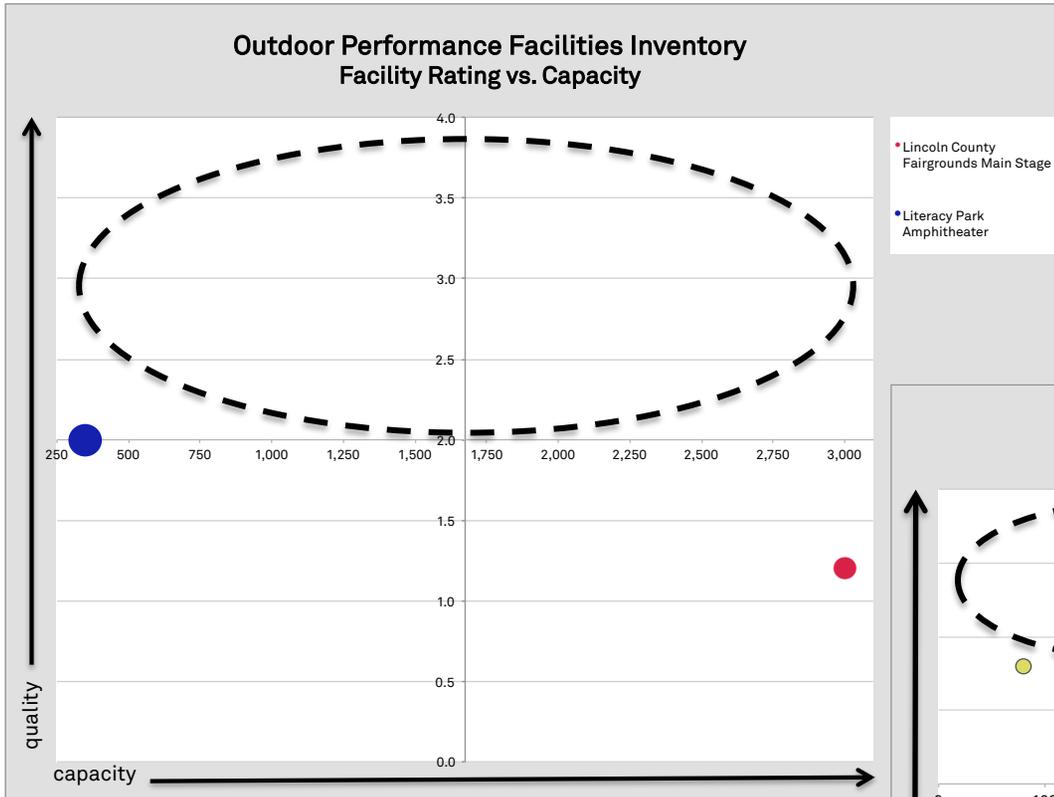
Indoor facilities

- * Here, the facilities have been colored according to their availability. (Once again, how easy it is to book a venue on a prime night of the week.)
- * Eden Hall, Yachats Community Presbyterian Church, and the Little Log Church and Museum have the highest availability, while Hilltop Bistro Café, Rogue Ale’s Brewers on the Bay, and Yachats Underground Pub + Grub have no availability.
- * The three highest rated facilities, Newport Performing Arts Center’s Alice Silverman Theatre and Studio Theatre and the Florence Event Center’s FEC Theatre, have low or medium availability.



Existing facilities conclusions

- * Overall, this research indicates that there are gaps in the market for high-quality performance space.
- * These gaps exist, in particular, for a well equipped, high-quality outdoor venue and, in Waldport, for an indoor facility with a capacity between 100 and 350 seats.
- * Programming gaps exist for presented performing arts in disciplines other than music and family programs.



Benefits + impacts



Benefits + impacts

Overview

- * Investing in the arts and culture can have significant impact on a community, contributing to such things as sense of place, quality of life, and economic, neighborhood, and community development.
- * In this section, we will look at city and regional goals for the future of Waldport, Lincoln County, and the Central Coast region, considering the role that investing in arts and culture can play in advancing them.
- * To identify these goals, we have spoken with city and community leaders and reviewed the following reports and studies:
 - * **The Seal Rock, Waldport + Yachats (South Lincoln County) 15-Year Community Tourism Vision (2012);**
 - * **The City of Waldport Comprehensive Plan Goals + Policies (Adopted August 1982; Updated September 2013);**
 - * **Lincoln County’s Economy: Key Takeaways from the “Ten Year Update on Lincoln County, Oregon’s Economy” (2014);**
 - * **Open Space Planning Charrette Presentation (September 10-12, 2015); and,**
 - * **Waldport Parks, Recreation + Trails Master Plan and Survey Results (December 2016).**



Benefits + impacts

- * Over the course of the study, we met with and interviewed multiple City of Waldport and community leaders. These interviews revealed a variety of goals for the community, including:
 - * Creating a destination in Waldport;
 - * Establishing a unique community identity;
 - * Economic development; and,
 - * Establishing a stream of revenue to fund open space maintenance.



Benefits + impacts

- * *Seal Rock, Waldport + Yachats (South Lincoln County) 15-Year Community Tourism Vision (2012):* This vision for the future of tourism in South Lincoln County envisions a community that:
 - * Has well-preserved natural resources and remote coastline;
 - * Has a world-class trail system;
 - * Identifies Waldport as a unique community where the river meets the sea;
 - * Is attractive to artists, writers, and photographers,
 - * Is home to signature off-season events and festivals; and,
 - * Has a culture of collaboration and cooperation.



Benefits + impacts

- * **City of Waldport Comprehensive Plan Goals + Policies (Adopted August 1982; Updated September 2013):** The City of Waldport Comprehensive Plan identifies a series of goals for planning in the community, covering areas such as citizen involvement, housing, agricultural lands, and forest lands. Here, we will consider those goals that are most relevant to this project.

City of Waldport Comprehensive Plan: Relevant Goals + Policies			
	<i>Open Space, Scenic + Historic Areas, and Natural Resources</i>	<i>Recreational Needs</i>	<i>Other...</i>
Related Goals	To conserve open space in the planning area.	Secure and develop park, open space, trail, and recreational facilities that meet the needs of residents and respect the scenic, natural, and cultural value of the Waldport community.	Public Facilities + Services: To provide for adequate, functional, accessible and aesthetic public facilities and services consistent with the planned level of development.
	To maintain the current inventory of important natural, scenic, and historic resources.	Consider the needs of all residents of the community (all ages, incomes, cultures, and lifestyles) in the planning, development, and operations of park and recreation facilities.	Land Use Planning: To identify activities of land use which have an effect on the public health, safety, and welfare.
		Support the economic vitality of the Waldport community through parks and recreation facilities and programs that are attractive to residents and visitors.	
Related Policies	The Waldport Development Code includes a Significant Natural Resources Overlay Zone intended to provide protection for identified significant natural resources within the City of Waldport and ensure reasonable economic use of property while protecting valuable natural resources within the City's Urban Growth Boundary and within the city limits.	Support recreational programs that contribute to healthy lifestyles, create a sense of community, nurture personal growth and development, and offer opportunities for residents to make positive contributions to the quality of life in the Waldport community.	
	Additional public access to open space lands should be developed.	Seek to involve all segments of the Waldport community in park and recreation planning.	
	Retention of open space for recreational sites and facilities shall be encouraged.	Protect the significant natural features of the site and surrounding area when developing parks and recreation facilities.	
		Seek to acquire land for parks and recreational activities in advance of urban growth and development.	
		Support the development of a multi-purpose community center that is a key component of the vitality of the Waldport community.	
		Seek compatibility between parks open spaces and recreational facilities and adjacent land uses.	
		Seek to partner with other entities to offer programs that interpret the area's natural processes, ecology, and history.	
		Promote and encourage youth recreation programs that meet the needs of the area's young people.	
		Design park and recreation facilities to minimize energy consumption and maintenance costs while still meeting user	

Benefits + impacts

- * *Lincoln County's Economy: Key Takeaways from the "Ten Year Update on Lincoln County, Oregon's Economy"*: This study looked at changes in Lincoln County's economy from 2003 to 2013. While it found that, over those 10 years, the county's economy had diversified, it predicts that the out-migration of young adults will create high demand for workers. The report ultimately recommends that, in order for Lincoln County to attract and retain a competitive workforce, it should invest in quality, affordable housing; transportation; affordable childcare; arts and culture; and schools.



Benefits + impacts

- * *Open Space Planning Charrette Presentation (September 10-12, 2015):* In September 2015, Lincoln County Schools held an open planning charrette aimed at creating a “schematic plan with community consensus” for the former Waldport High School site. Objectives and key themes that were discussed included:
 - * “Creating a coastal model for revenue generating open space;
 - * Pursuing a financially sustainable open space concept;
 - * Establishing a multi-use space that connects people to Waldport’s unique natural resources and provides active and passive recreation amenities;
 - * Creating an accessible public space available for residents and visitors of all ages and abilities;
 - * Developing a community showcase with benefits for diverse interests;
 - * Creating a community asset and a regional draw, bringing people to Waldport for sports, recreation, festivals, and unique retail opportunities; and,
 - * Providing ecological, science, and technology education and training opportunities.”



Benefits + impacts

* **Waldport Parks, Recreation + Trails Master Plan (December 2016):** Recognizing that the community lacked a comprehensive system of parks, recreation facilities, and trails, the City of Waldport set out to update the Waldport Parks Master Plan. The new Waldport, Parks, Recreation + Trails Master Plan establishes a series of goals for the future of parks and recreation in the community. Relevant goals and objectives are included in the chart below.

City of Waldport Parks, Recreation + Trails Master Plan: Relevant Goals + Objectives				
Related Goals	Provide a variety of open space and recreation facilities to meet the needs and desires of Waldport citizens and visitors	Enhance the economic vitality of Waldport through the development of attractive park and recreation facilities.	Create a preferred plan for the former Waldport High School Site.	Protect and enhance awareness of natural and cultural resources.
Related Objectives	Identify and provide recreational facilities and programs to meet the demand of local citizens and visitors.	Improve the physical form and appearance of the city.	Create a coastal model for reuse of lands vacated by FEMA-assisted relocations.	Recognize, protect, and promote Waldport's unique natural resources and natural beauty.
		Create a well-known 'class' open space system, capitalizing on Waldport's natural resources, natural beauty, parks, recreation facilities, and trail system.	Pursue a financially sustainable open space concept.	Develop an interpretive program that informs and educates the public about Waldport's natural resources.
		Provide a destination facility that is unique to the central Oregon coast.	Establish a multi-use space that connects people to Waldport's unique natural resources and provides active and passive recreation amenities.	
		Determine viability of an outdoor amphitheater.	Create an accessible public space.	

continued on next page...



Benefits + impacts

- * As part of the development process for the Waldport Parks, Recreation + Trails Master Plan, the City conducted a community survey and series of community meetings. Relevant highlights from the survey are included below. In total, the survey received 205 responses, 84% of which were from Waldport residents.
 - * Twenty-three percent of survey respondents indicated that they use parks and recreation facilities in Waldport more than once a week.
 - * Walking on local trails/paths/beaches, beach activities, and relaxing/hanging out/people watching were the most common response to the question, “In which outdoor recreational activities do you or members of your household participate (in Waldport and beyond)?” Forty-seven percent of respondents indicated that they attend outdoor concerts, fairs festivals.
 - * The majority of survey respondents do not feel that the City’s existing parks and recreational facilities meet the needs of all age groups and abilities, and 65% of respondents feel the City should acquire more park land.
 - * When asked to rank investment priorities on a scale of 1 to 5, the development of an outdoor amphitheater and event space received an average response of 3.32. To compare, public access sites to waterways and children’s playgrounds, the two highest rated responses, had average responses of 3.45 and 3.41, respectively.
 - * When asked to rank potential developments in the open site, specifically, an amphitheater had an average response rate of 5.5, falling behind playground and play areas, trails and boardwalks, and parkland and picnic areas.
 - * To open-ended questions asking about preferred long-range planning goals, respondents indicated interest in projects that appeal to a diversity of ages, interests, and abilities.



Benefits + impacts

- * Other benefits and impacts include:
 - * ***Sense of Place + Quality of Life:*** Spaces with programs that engage the public, particularly facilities for arts, education, and outreach programs, have potential to contribute to the character and identity of a community. These types of programs and facilities provide opportunities for cross-sector and cross-cultural collaboration, socialization, enhancing sense of community, and providing hands-on experiences that are attractive to regional residents—all contributing to the community's quality of life.
 - * ***Quality of Workforce + Corporate Recruitment:*** Studies suggest that strong arts and cultural communities rank among the top factors for decision makers when considering relocation for employment opportunities as they indicate an educated workforce and high quality of life.
 - * ***Neighborhood + Community Development:*** Research has shown that community arts programs have enhanced and improved community development. The arts enable individuals and groups to express themselves and, in the process, become more involved in contributing to the development of their community.
 - * ***Teaching Innovation + Creativity:*** Finally, the teaching of the arts is now being recognized as a fundamental need for the North American economy and its workforce, given the automation of many jobs and growing competition from lesser-developed economies.



Benefits + impacts: conclusions

- * As a whole, the open space project is in line with a number of community goals. The inclusion of an amphitheater in the project can contribute to such goals as:
 - * Community development,
 - * Establishing a community identity,
 - * Creating an accessible space that connects community members and visitors to the region and its natural resources,
 - * City beautification and improvement,
 - * Providing gathering space, and
 - * Economic development.



Conclusions + recommendations



Conclusions

Our research suggests:

- * **The market:** The market for the arts is complicated. Locally and regionally, the population is aging. In addition, there are low levels of educational attainment and household income, and a notable homeless population. There are, however, active arts communities in cities like Yachats and Newport. The challenge is that both of these communities are boosted by tourism. While Waldport does have a tourist industry, it plays a smaller role in the local economy than in many other coastal cities.
- * **User demand:** Demand for an amphitheater is limited, in part because of distrust in the weather. Yet, three local entities did express interest in using an outdoor space for a total of 24 days out of the year. In addition to these users, three potential partners—Seashore Family Literacy, Waldport High School’s Coastal Tourism and Marketing Career Pathways program, and the Confederated Tribe of Siletz Indians—could play a major role in activating an outdoor space.
- * **Existing facilities:** There is currently no high-quality amphitheater within 35 miles of Waldport. The two amphitheaters that do exist are both in Newport and serve very specific purposes within the community. Indoor performance space also tends to be lower in quality and has a limited programming scope. There are, however, a number of very active community arts groups, particularly in the areas of dance, theater, and music.
- * **Community benefits + impacts:** The City of Waldport and community at large have put considerable thought into planning for the future of Waldport. The Tidelands conceptual plan is a reflection of that planning and is in line with a number of community goals. The development of an amphitheater can further contribute to those goals by providing a sense of place for the community; contributing to economic development and city beautification and improvement; and connecting the community and region to their natural environment and resources.



Conclusions

- * Finally, a project like this is will surely have its challenges. Specific challenges identified over the course of this study include:
 - * Justifying a project in the arts when so much of the community is in need;
 - * The community, which can be insular in nature and skeptical of change;
 - * The weather;
 - * The lack of supporting infrastructure (hotels, restaurants, parking, etc.);
 - * Lack of funding; and,
 - * The perception that this project would make more sense in Newport.



Recommendations

- * Given these conclusions, our recommendations are as follows:
 - * **Develop a small community amphitheater.** The current size and quality of the market does not indicate the ability to support a large amphitheater. There is, however, some demand for outdoor performance space. As such, we would recommend a small, partially covered, natural amphitheater with a capacity of 300 to 400 (and the potential to grow should the market necessitate it) that can be used for community events, performances, and nature programs. The nature programs should tie into the open site's wetlands and other natural resources and could be conducted in partnership with the Waldport High School Career Pathways program or the Confederated Tribe of Siletz Indians.
 - * **Partner with the Confederated Tribe of Siletz Indians.** We recommend that the City take advantage of the unique opportunity to work with the Confederated Tribe of Siletz Indians. There is considerable breadth to this opportunity in that, in addition to working with the Tribe on the redevelopment of the former school site (including the development and implementation of outdoor programs), the possibility may also exist to develop a tribal cultural center. Such a facility could connect to the open site through programming and outdoor exhibitions and would distinguish Waldport from its surrounding communities.
 - * **Rehabilitate Shelter Me's gymnasium/auditorium.** In addition, we would recommend that the City partner with Seashore Family Literacy to refurbish the former Waldport Middle School gymnasium/auditorium. Once renovated, the space could serve as a backup 'rain space' for amphitheater events, an indoor performance or pre-show space for Beachcomber Days acts, and, more broadly, as a community gathering space. Seashore Family Literacy could also take some responsibility for programming an amphitheater through the activities of its after school and summer programs.
 - * **Outfit the Tidelands campus to operate as a festival grounds.** Finally, we would suggest that the former high school site, along with the Shelter Me Center for Learning facility and parking lot, be outfitted to serve as a festival grounds with access to electrical hookups for vendors, moveable stages for performances, and other amenities. Such a space would provide support to Waldport's Beachcomber Days and perhaps inspire the development of other events and festivals.



Other suggestions

- * In addition to the previous recommendations, we see a few other ways in which Waldport could enhance its reputation as a destination through arts and culture. These options make sense for Waldport, particularly given its location between Newport and Yachats, two arts-forward communities.
 - * **Become the summer home of a Portland organization.** The idea here is that Waldport could become the summer performance base for an organization like the Oregon Symphony, Oregon Ballet Theatre, or the Portland Opera. A partnership like this would increase utilization of an amphitheater and elevate Waldport as a destination for professional performing arts.
 - * **Develop a summer arts and/or ecology camp.** The City of Waldport could work in collaboration with Waldport High School's Coastal Tourism and Marketing Career Pathways program, Seashore Family Literacy, the Confederated Tribe of Siletz Indians, the Oregon Coast Council for the Arts, the Sitka Center for Art + Ecology, and/or a regional arts organization to develop a summer camp that combines the arts and ecology. This idea would bring activity to both the amphitheater and the Shelter Me building and would be in line with such goals as connecting the community to the nature of the region and recognizing and protecting Waldport's unique natural resources and beauty.
 - * **Create a residency program.** The City of Waldport could host an annual artist residency program, inviting artists (through an RFP) to live and work in Waldport for a designated period of time. As part of the residency, the artist could be required to work in/with the community (providing workshops, classes, studio events, etc.) in exchange for the time and space to create. The parameters can be flexible, but should be in line with community goals. For example, one requirement of the residency might be that the artist contribute to city beautification projects.



Comparable projects



community amphitheater: The LaFontaine Family Amphitheater | Milford, MI

- * The Village of Milford (population 6,641) is located an hour northwest of Detroit.
- * In 2013, the Milford Downtown Development Authority funded a master plan to improve quality of life in Milford. Around the same time, the Milford Rotary had put out a call for public projects and the Huron Valley Chamber of Commerce had expressed interest in a community enhancement project.
- * Working collaboratively, the groups developed a plan for an amphitheater in the community's Central Park that could support its annual summer concert series.
- * The 2,000-capacity LaFontaine Family Amphitheater cost \$500K (Inclusive of public restrooms), all of which was raised through grants, private donations, and in-kind services.
- * After 18 months of construction, the facility opened in 2015.
- * Programming activity includes the summer concert series and community events.



**native american cultural center: Makah
Cultural + Research Center | Neah Bay, WA**

- * Neah Bay (population 865) is a census-designated place on the Makah Reservation.
- * The Makah Cultural + Research Center, a 24,000 square foot facility housing more than 55,000 pre-contact artifacts, opened in 1979.
- * In addition to permanent and temporary exhibition space, gallery space, and a replica longhouse, it includes a museum store, an ethno-botanical garden, a library, and archives.
- * Programming includes environmental guided tours, basketry and carving demonstrations, workshops, and lectures on topics such as Makah storytelling, fisheries management, and forestry.
- * Environmental tours include visits to the Ozette Archaeological Site, the Cape Flattery Trail, local village sites, and local beaches.
- * The facility is owned by the Makah Tribe and operated by a nonprofit.
- * Annual attendance is 14,000 people.



**native american cultural center: The
Museum at Warm Springs | Warm Springs,
OR**

- * Warm Springs is in unincorporated community of 2,945 in Jefferson County.
- * The Museum at Warm Springs, Oregon's first Tribal Museum, opened in 1993 following a grassroots effort to develop a cultural center.
- * At 25,000 square feet, the building includes permanent exhibition space, an education room, and a gift shop. There is also an amphitheater.
- * The Museum has one of the largest and most complete collections of any Native American museum in the United States, including Pacific Northwest Native American paintings, sculpture, masks, and ceremonial clothing.
- * Programming includes annual Tribal Member and Tribal Youth art exhibitions, live demonstrations every summer weekend, festivals, and events.
- * The facility is owned by the Tribe, and operated by a nonprofit.
- * Annual attendance is 9,000 people.



festival grounds: McGrath Amphitheater + Cedar Rapids Riverfront | Cedar Rapids, IA

- * In 2009, the City of Cedar Rapids (population 126,326) worked with Sasaki Associates to develop a plan for its riverfront, which had been devastated by flooding.
- * The project's goals were to better connect the river to the community's trail system, increase recreational opportunities, create a downtown destination, and restore wetlands and riparian zones to help contain and absorb floodwaters.
- * The plan resulted in the creation of the McGrath Amphitheater and a festival lawn.
- * Designed to also function as a levee, the amphitheater can be used for free, small-scale community events or for ticketed events for crowds of 5,000.
- * The area surrounding the amphitheater was also designed to serve a variety of purposes. In addition to including event space parking, it operates as a public park during the day and as an event space, hosting festivals of all sizes.



**arts organization summer home: Snow Park
Outdoor Amphitheater | Park City, UT**

- * Deer Valley Resort opened in Park City (population 8,058) in 1981.
- * In the summer, the resort becomes a destination for mountain biking, hiking, and other outdoor activities, including a summer concert series.
- * Performances take place at the Snow Park Outdoor Amphitheater, the summer home of the Utah Symphony and the Utah Opera's Deer Valley Music Festival.
- * Programming includes a free Wednesday night concert series and commercial entertainment.
- * Visitors to the amphitheater can pre-order gourmet picnic baskets and bags, purchase items at the Concert Concession Stand, or grab takeaway items from the Deer Valley Grocery-Café.
- * The amphitheater does not have any permanent seating, and all concerts are held rain or shine.



**summer arts + ecology camp: Cary Institute
of Ecosystem Studies | Millbrook, NY**

- * Based in Millbrook, NY (population 1,434), The Cary Institute of Ecosystem Studies was founded in 1983 as an independent environmental research organization.
- * Each summer, the organization runs a series of camps, including an Arts + Science camp.
- * Aimed at students in grades 6 through 12, Art + Science explores how artistic creativity and scientific investigation can be combined to understand the world, introducing participants to observational and notational research methods.
- * During the week-long program, students create field journals and engage in site-specific art creation based on scientific research.
- * They also experiment with data visualization, sketching, collaging, writing, and critical questioning.



artist residency program: New York Mills Cultural Center | New York Mills, MN

- * New York Mills (population 1,225) is a rural community in central Minnesota.
- * In the late 1980s, an artist from Minneapolis moved to the area and, interested in how the arts could be used to spur economic development, created an artist residency program.
- * Town officials contributed \$35,000 to the effort. Five years later, 17 new businesses had moved to the community, creating 200 new jobs. By 1990, the New York Mills Cultural Center, a nonprofit center for rural creativity, community vitality, and lifelong learning, was formed.
- * Today, the New York Mills Arts Retreat is a program of the Cultural Center. There are two residencies annually, both of which are awarded through an application process.
- * Artists stay in a one-bedroom house and have access to studio space in the Cultural Center. Engaging with the community is encouraged but not required, and the ability to demonstrate commitment to the arts through volunteerism is part of the application process.
- * The residency does not include a stipend.



arts/ecology camp + artist residency program: Caldera | Sisters, OR

- * Caldera is a nonprofit arts organization and center located 16 miles west of Sisters, OR (population 2,224).
- * The organization began in 1996 as an arts camp in the mountains for kids with limited opportunities.
- * Today, it is recognized as one of the top 50 youth organizations in the country.
- * Camp Caldera is an annual arts and nature camp serving 150 youth from Portland and Central Oregon. While at camp, students work with teaching artists, naturalists, and mentors and participate in music/audio production, visual arts, dance, theater, and the like. They also participate in nature hikes and challenge courses.
- * Caldera operates an artists in residence program every year from January through March. The residency is available to artists in any discipline, including culinary arts, design, engineering, and the sciences. Artists are provided with a private cabin, are required to participate in Open Studios events, and are invited to to apply to do workshops and/or outreach projects with the local community.



Next steps

- * Have we fairly described the situation and the opportunities for an amphitheater in Waldport?
- * What additional input and information is needed?
- * Are our recommendations in line with your sense of needs?
- * How should we proceed?

