

CLACKAMAS COUNTY BOARD OF COUNTY COMMISSIONERS

Study Session Worksheet

Presentation Date: 6/11/13

Approx Start Time: 2:30pm

Approx Length: 1 hr

Presentation Title: Clackamas Film and Media Alliance / Film Production Permit

Department: Business & Community Services, Gary Barth, Director
Division: Business & Economic Development

Presenters: Catherine Comer, Manager, Business & Economic Development;
Jamie Johnk, Coordinator, Business & Economic Development,
Andy Mingo, Director, Digital Media Communications, Clackamas Community College

Other Invitees:

Gary Schmidt, Director, Public and Government Affairs
Debbie McCoy, Cable Franchise and Operations Manager

WHAT ACTION ARE YOU REQUESTING FROM THE BOARD?

1. Continued support for creating a partnership with Clackamas County and Clackamas Community College in growing the film and digital media production industry throughout the county, creating opportunities for new businesses, workforce training, and jobs. Support in creating Clackamas Film and Media Alliance
2. Unveiling of new online county-wide Film Permit Application – Information only

EXECUTIVE SUMMARY:

1. Clackamas Film and Media Alliance

Clackamas County Business and Economic Development has identified film and media production as a key cluster in the county. Attached (Economic Landscape brochure for film and media production) B&ED staff have worked for the last year to develop programs that will create opportunities for new businesses, film productions, workforce training and jobs. Staff was presented with the Governor's Film Advocacy Award in January of this year for these efforts.

In the last six months, B&ED has formed a partnership with Clackamas Community College's department of Digital Media Communications to seek opportunities to bring more productions to the county, create training opportunities for interns and ultimately create an environment that will increase film and media production businesses and industry jobs.

Staff is currently working on a plan to form the Clackamas Film and Media Alliance, a non-profit organization which will oversee efforts to raise funds and manage projects associated with these goals. An immediate opportunity to sub-lease an existing sound stage located in the Clackamas Industrial Area has expedited these efforts. Currently this facility is leased by Electric Entertainment who have invested over \$1M into creating a state-of-the-art sound stage including sets, construction and prop departments, as well as existing vehicle fleet used for filming. If successful, subleasing this facility for 6 months of the year could allow the Alliance to create and manage a training center and business incubator.

Clackamas Community College is pursuing a U.S. Department of Labor Trade Adjustment Assistance Community College and Career Training (TAACCCT) Grant. This grant funds efforts to create and expand innovative partnerships between community colleges and businesses to train workers with the skills employers need.

2. Film Permit Application

In conducting outreach and developing strategies for growth in the Film and Media Production cluster, economic development staff learned from industry representatives that the lack of uniform filming permitting discourages production companies from filming in certain locations. Therefore, staff developed an online Film Permit Application unifying the filming process and notification countywide. This one stop application process is designed to build film and media opportunities in Clackamas County as well as to take the frustration and "red tape" out of the permitting process countywide. In partnership with the Oregon Film & Video office, Business and Economic Development staff is promoting the regional development of the film, video and multimedia industry in order to increase the industries revenues and investment county-wide. Clackamas County Business & Economic Development serves as the primary liaison between film and media productions and county wide cities and agencies and is responsible for marketing and attracting film and media related businesses to Clackamas County for the purpose of economic development; for assisting productions with the permitting process; and for connecting and facilitating communications between Clackamas County communities and productions.

Staff will present a brief overview of online permit application.

FINANCIAL IMPLICATIONS (current year and ongoing):

1. Clackamas County Film and Media Alliance
Currently staff time to create plan and form alliance. Ongoing resources to support the Community College from Clackamas County Cable Public, Educational and Government (PEG) fees, and possibly lottery funds to support start-up of alliance non-profit.
2. Film Permit Application
Staff time to manage online permit inquiries

LEGAL/POLICY REQUIREMENTS:

1. Legal assistance will be needed to form non-profit alliance and possibly assistance in creating a program to allow lease of facility .

PUBLIC/GOVERNMENTAL PARTICIPATION:

N/A

OPTIONS:

Clackamas Film and Media Alliance

1. Support ongoing efforts to create alliance
2. Do not support ongoing efforts to create alliance

Film Production Permit
Informational only

RECOMMENDATION:

Staff respectfully recommends that the Board continue to support efforts in creating Clackamas Film and Media Alliance.

ATTACHMENTS:

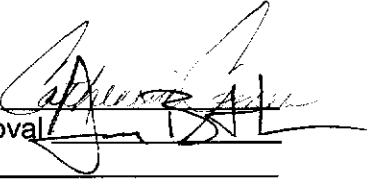
Clackamas County Economic Landscape Film and Media Production Brochure
Link to online Film Production Permit

SUBMITTED BY:

Division Director/Head Approval

Department Director/Head Approval

County Administrator Approval



For information on this issue or copies of attachments, please contact
Clackamas County Economic Development 503-742-4329

Clackamas County Film and Media Production



There are many reasons why Clackamas County continues to be a preferred location for the film and media production cluster. The natural scenic beauty of the Cascade Range dominated by Mt. Hood provides a rugged landscape with wild & scenic rivers and a range of settings that also provide convenient access to Portland. It is no wonder why major motion pictures (such as Twilight, Untraceable, The Haunted, and The Shinning) and television series (such as Leverage and Grimm) have selected Clackamas County for their studio productions. This cluster is also comprised of nationally renowned publishing and broadcasting companies and creative designers, graphic artists, performers and writers.



Representative film and media production companies in Clackamas County include: Waggener Edstrom, Dark Horse Publishing, AEC, Inc., Oregon Publications Corp., Chevalier Advertising, Pamplin Broadcasting, Pacific Marketing & Publishing, Pacific Coast Crewing, and Cinematics Studios.

Economic Benefits to Clackamas County and the Region

The film and media production cluster is an important component of the Clackamas County economy and responsible for bringing in \$91 million in trade from outside the nine-county Portland-Vancouver region. Its vitality is measured by direct economic impacts, secondary benefits, and strategic market opportunities. Additionally, film and media generates business for professional and service industries, and promotes unique career-level employment opportunities.

This cluster's prominence is driven in part by several film and media production companies located in various Clackamas County urban and rural office and industrial settings. As a direct economic benefit, production costs, employee compensation, and tax payments account for \$212 million in annual GDP for Clackamas County.

Film and Media Production Cluster Current Stats for Clackamas County

- Annual GDP (Value Added):** \$212 Million
- Cluster Share of County GDP:** 1.4%
- Exports/Sales from Outside Region:** 43%
- Direct Employment:** 4,791 jobs
- County Businesses:** 332
- Number of Businesses in Top 100:** 1
- 10-year Job Growth Forecast:** 25%
- Cluster Location Quotient (LQ):** 5.2

Source: compiled by FCS GROUP based on IMPLAN (2010), adjusted to 2011 dollars; with 10-year forecast by Oregon Employment Dept. GDP = gross domestic product. Location Quotient (LQ) depicts relative share of this industry's contribution in Clackamas County compared to this industry's contribution in the 9-county Region.

Film & Media Production 2010 Impacts



Total Impact on MSA: 7,438 jobs; \$360 M in GDP

CLACKAMAS COUNTY ECONOMIC LANDSCAPE
Film and Media Production

Film and Media Production Cluster: Annual Economic Benefits

Location Quotient for Cluster in County	5.2
Contribution to County GDP	1.4%
Business Establishments in County	332
Average Labor Income in County(per job)	\$24,055
Total Labor Income in County	\$115,249,000
Employment	
Direct Jobs in Clackamas County	4,791
Secondary Employment	2,647
Total Direct & Secondary Employment	7,438
Direct GDP and Output in Clackamas County	
Direct GDP (Value Added)	\$212,010,000
% Traded Outside Region	43%
Output	\$424,910,000

GDP = Gross Domestic Product.

Source: analysis by FCS GROUP. All data in this table, with exception of business establishments, are based on 2010 IMPLAN estimates. Employment reflects total jobs (full and part time workers as well as self-employed). Estimated business establishments are derived from the Oregon Employment Department. Location quotients are based on Clackamas County's relative propensity to attract employers within this cluster in comparison to the nine-county Portland-Vancouver region.



Film & Media Production: Strategic Market Opportunities

The film and media production cluster is thriving in Oregon due in part to excellent cost advantages and direct incentives provided by the state. This includes production and labor investment rebates offered by the Oregon Production Investment Fund (OPIF), and the Greenlight Oregon Labor Rebate. In addition, Oregon has a rebate program for local filmmakers through the Indigenous OPIF program (see back page for details).

The nationally regarded high quality of life continues to attract creative professionals to Clackamas County and the region with specialties in film & media production. This combined with Oregon's renowned "Silicon Forest" high tech setting, low cost of living, and ample regional labor force should foster growth in the film & media production cluster for many years.

Film and Media Production Cluster North American Industrial Classification System (NAICS) Categories

5111: Publishers. Includes newspapers, periodicals and book publishing.

5121: Motion Picture and Video Industries. Includes TV and movie productions.

5122: Sound Recording.

5151: Radio and TV Broadcasting.

5191: Internet Publishing and Broadcasting.

5419: Advertising and related services.

7113: Promoters of Performing Arts and Sports.

7115: Independent Artists, Writers and Performers.

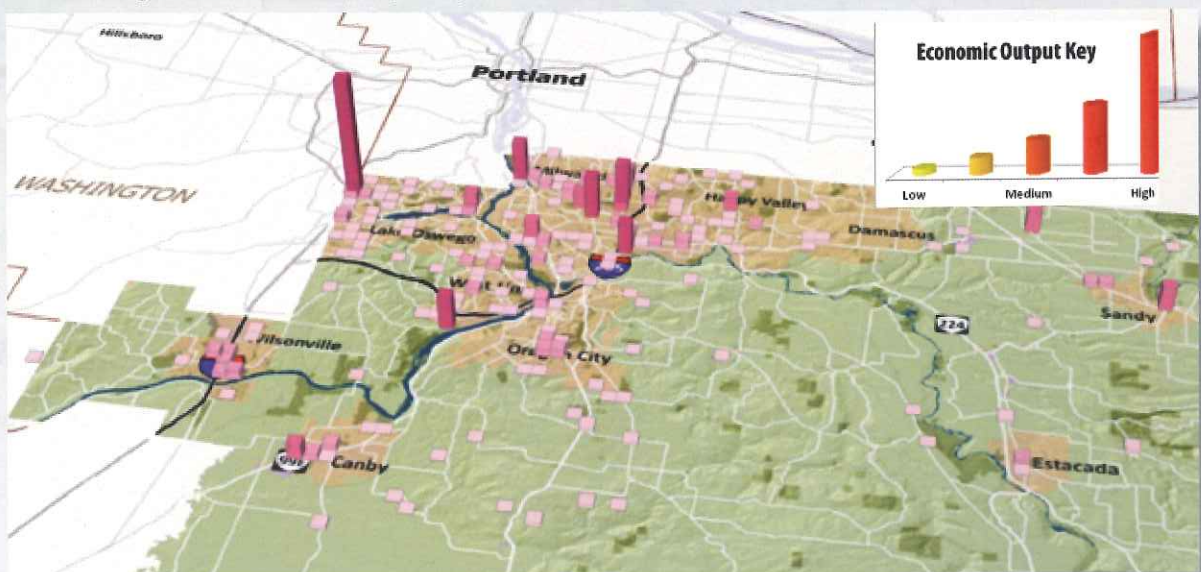
Sample of Film & Media Companies in Clackamas County

Waggener Edstrom, Inc. *
Dark Horse Publishing
AEC, Inc.
Oregon Publications Corp.
Chevalier Advertising, Inc.
Pamplin Broadcasting Oregon, Inc.
Pacific Marketing & Publishing, Inc.
KPDQ – AM & FM
Hot Off The Press, Inc.
Pacific Coast Crewing, Inc.
Cinematics Studios

Source: Oregon Employment Department.
 * Indicates top 100 County Business Listing



Existing Film and Media Production Companies in Clackamas County: Annual Regional Economic Output by Location*



*Reflects total economic output attributed to business activities measured in 2010, using the IMPLAN model for Clackamas County.

CLACKAMAS COUNTY ECONOMIC LANDSCAPE Film and Media Production

Career Opportunities

Film and media provides a substantial range of opportunities from technical production assistance to acting and performing. The following are the representative occupations:

- Technical Director
- Actor/Entertainer/Performer
- Musician/Singer
- Audio Producer
- Equipment Operator (i.e., sound, lighting)
- Graphic Designer
- Book Keeping and Accounting



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Resources

Clackamas County Business & Economic Development
www.Clackamas.us/business

Business Oregon
www.oregon4biz.com

Film Oregon
www.filmoregon.org

Source Oregon
www.sourceoregon.com

NW Film Center
www.nwfilm.org

Oregon Governors Office of Film & Television

<http://oregonfilm.org/>

Oregon Media Production Association
www.ompaa.org

Contact Information

Clackamas County Business & Economic Development
150 Beaver Creek Road
Oregon City, Oregon 97045
503-742-4329
www.clackamas.us/business



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