# COMMUNITY NEEDS ASCERTAINMENT

## FOR

## MULTNOMAH COUNTY AND THE CITIES OF FAIRVIEW, GRESHAM, PORTLAND, TROUTDALE AND WOOD VILLAGE

### PRELIMINARY STAFF REPORT

### PREPARED FOR THE MT. HOOD CABLE REGULATORY COMMISSION

### JUNE 1995

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## PRELIMINARY STAFF REPORT

### Introduction

The goal of the community needs ascertainment is to identify and inventory communication and technology needs and interests related to cable-based communications for the communities within Multnomah County and the cities of Fairview, Gresham, Portland, Troutdale, and Wood Village.

The Mt. Hood Cable Regulatory Commission (MHCRC) and its staff will use results of the ascertainment to develop possible community benefits for inclusion in new and/or renewed cable franchise agreements for the east Portland and east Multnomah County service areas. The current franchise agreements held by Paragon Cable expire in May 1996 (east Portland) and May 1998 (east Multnomah County).

It is important to note that the community needs ascertainment is an ongoing process. The MHCRC and its staff will continue its ascertainment efforts in order to ensure that identified needs encompass all segments of the community. MHCRC staff=s intent with this report is to provide a preliminary analysis and summary of community needs identified to date. Stakeholder groups and individuals will have several opportunities in the coming months for input on new franchise agreements.

This report summarizes a broad effort carried out the past few months to ascertain the potential uses of cable-related technologies by various stakeholder groups in the franchise area. This includes not only the desires and needs of these groups in using cable technologies, but also the constraints they face.

The stakeholder groups considered here are:

- community groups and non-profit organizations
- public institutions (government agencies, schools and libraries)
- residential cable subscribers of Paragon Cable
- non-subscribers residing in Paragon=s service areas
- east county citizens (participants in MCTV=s ascertainment process)
- Multnomah Community Television (MCTV)
- Portland Cable Access (PCA)

As is evident, many of those who participated in the ascertainment process would be considered members of several of the stakeholder groups listed above. And, indeed, there was much overlap of responses and ideas during this ascertainment process.

Several different ascertainment methods were employed in this process. These methods included surveys, focus groups, in-depth interviews, and combinations of methods. Therefore, some of the findings here cite survey responses, while others describe needs identified by representatives of a constituency or organization. In addition, not all documents referenced or drawn upon are included with this report. All of the findings

presented are regarded as valuable since they were generated through a deliberative process and by members of the community.

Most ascertainment methods were designed to consider the current two Paragon franchise areas (Portland and East Multnomah) and to identify possible differences in needs and interests of the two general areas, if indeed, differences existed. Staff discovered that, in the big picture, general findings of needs were similar in the two service areas. However, distinct differences exist between the two areas and among stakeholder groups when considering more specific needs or how identified needs might be met. The attachments to this report provide additional information about those differences, which will be critical to consider during the MHCRC=s and staff=s upcoming discussions about the franchise agreements.

### Summary of Ascertainment Findings

Staff identified five key findings of need that were commonly identified by stakeholders. Those include:

- More bandwidth capacity is needed.
- Existing and potential components of the cable communications system must be better connected.
- Community bandwidth must be managed as a finite resource by its users.
- Universal access to communications technologies, especially emerging technologies, must be improved.
- High performance standards for maintenance and operation of public components of the system should be established and met.

### Linkage to Larger Policy Objectives

It is worth noting that many of the needs identified in this ascertainment tie in to larger public policy goals expressed in state and local benchmarks. Increased cable system capacity and connectivity, for example, support economic development by facilitating business competitiveness. They support telecommuting, which reduces commuting, travel and pressures on land use. They offer the promise of increasing access to government services, as well as making public sector dollars go farther through technology. Furthermore, increased cable system capabilities complement policies and benchmarks intended to advance diversity and community harmony.

## ASCERTAINMENT FINDINGS

### 1: *BANDWIDTH CAPACITY.* More bandwidth capacity is needed.

Bandwidth capacity is defined here as the capacity of the system to carry a variety of applications for video, voice, and data communications. Traditionally, bandwidth

capacity on cable systems has referred to analog video transmissions. However, the communications industry is in a transition from analog to digital technology. State-of-the-art cable systems, as a part of this transition, are capable of accommodating emerging applications such as E-mail, Internet access, and data transmissions, as well as more traditional video applications.

Stakeholder comments, evident technological trends, and booming business interest in communication technology indicate that increased service demands will be placed on the cable system, drawing on both its video and its digital data transmission capability. However, according to Paragon, its current residential system capacity is full and the bandwidth available for public uses of the institutional network is nearing capacity. Just as additional capacity will be needed to meet greater demand for the cable company=s commercial communication services, so will capacity be needed to meet growing demand for public uses of the system. And just as the company=s commercial services will need to accommodate demand for greater speed, convenience, security, and reliability, so will the system=s public uses.

Here are just a few examples to illustrate this need:

- Paragon's subscriber survey indicates that younger people (18 to 35 years old) exhibit higher interest in new entertainment and information technologies than those over 35. Demand for channel capacity will continue to grow with this computer literate generation.

- Just after Paragon removed C-Span2 from its lineup due to lack of channel space, the Cable Commission was flooded with complaints, and people packed the next commission meeting to protest the cancellation.

- Both subscribers and nonsubscribers surveyed in the ascertainment process described as important to them access to new on-line or interactive services, such as library information searches, voting, and obtaining licenses and permits. As client demand increases, libraries, government agencies, and schools will need the transmission capacity to meet this demand.

- Access channels are programmed nearly to capacity and interest in community television is growing.  Reports from both PCA and MCTV note that the channels dedicated to community programming are used to capacity.  Nonprofit organizations currently using community access channels expect to use more channel capacity in the future. None expects to use less.  And, organizations not using community television resources expressed great interested in airing Public Service Announcements (PSA) and nationally-produced videos, listing organization activities on community bulletin boards, and carrying events live on the access channels.

- Government programming is a case in point. Surveys show that roughly half of cable subscribers are interested in viewing government programming, especially live meetings. However, when important public meetings (such as those of  the Portland City Council, the Metro Council, the Portland School Board, and the Multnomah County Commission) are held at the same time, the system=s limitation to only one government channel per franchise area permits just one meeting to be cablecast live. A second government channel would ease this problem.  In addition,

because of Paragon=s limited bandwidth across the Willamette River, gavel-to-gavel, live coverage of government meetings, including the Multnomah County Commission meetings, is not guaranteed.

- Institutional users cite the need for more bandwidth to transport information between organizations and to citizens. This is due to several factors including higher volumes of data, changing storage format (formatted test, image, fax and video verses simple text), graphic computer display of information, and the trend toward interactive on-line information demands from the public.

- In the ascertainment of public institutions, respondent agencies expressed interest primarily in today=s applications. However, even E-mail, which is presently a low-bandwidth application, will be transformed in the next few years into a high-bandwidth application. E-mail technology is just emerging that allows the user to embed voice and video clips in an E-mail document. This and similar innovations will increase bandwidth requirements by a factor of ten.

- The Commission=s technical consultant concluded that Paragon has run out of forward channel space on its residential network, making it difficult to satisfy the current needs of customers, community access providers, and public institutions. The consultant recommended that future system capacity should represent the equivalent of no less than 750 MHZ of analog video channel space or 110 video channels compared to Paragon=s current 57 channels.

- The technical consultant also recommends that an upgraded distribution system should provide no less than 10 upstream channels. The existing system provides four upstream channels all used for cable company purposes. The recommended upstream channels would help meet identified needs for services such as live televised meetings and events, distance learning by schools, and high-speed Internet access.

## 2. *CONNECTIVITY.* **Existing and potential components of the cable communication system must be better connected.**

For the cable system to function as a true communications network, it must connect institutions to one another, it must connect institutions with their constituencies, it must connect citizens to citizens, and it must be part of a greater regional communications infrastructure.

In this regard, the existing system is limited. First, the coaxial cable system that links institutions is not available to east Multnomah County. Second, there is no connectivity between the current residential and institutional portions of the system. Third, the system does not have connections with other telecommunications systems to provide seamless networks locally, regionally or internationally.

On the other hand, the franchise provider has demonstrated its ability to connect with other metro area cable systems in order to share commercial advertising inserts and local origination programming with other area cable operators and to provide the Community Access Network (CAN) channel to all metro area subscribers. Moreover, the cable system passes virtually every home in Multnomah County east of the Willamette River. This gives it tremendous potential as a means of linking government

agencies, schools, libraries, elected officials, and community organizations with the constituencies they serve in the franchise area.  The cable system also has the unique capability to Anarrow-cast≅ or send signals to discrete communities within the system=s service area.

Examples of needed connectivity include the following:

- Citizen-to-citizen and small area connections were viewed as essential to encouraging community dialogue and addressing issues of local importance.  For emergency and disaster planning, Metro identified the need to connect with discreet areas, such as residents who generally live along the Sandy River,  to provide disaster warnings and information. East county citizens found that opportunities for exchange between smaller Acommunities of interest≅ within the community-at-large and neighbor-to-neighbor interaction are key to encouraging civic involvement.

- All stakeholders identified linkage between institutional and residential networks for a myriad of applications. Schools see it as a means to provide classroom curriculum and information to parents. Government agencies view it as an efficient and cost effective way for citizens to access public information or conduct transactions (e.g. apply for a permit or drivers license).  Subscribers and non-subscribers indicate that they would highly value a home link with library resources.  In addition, home businesses and telecommuters would benefit from high-speed access to data sources carried on an institutional network.

- Lack of an available I-Net system in east county and lack of a unified link to other cable companies in the region were two of the problems most commonly cited in the institutional ascertainment. They underlie the constraints on needed connections between institutions. For example, they impede distance learning projects by video between schools. They also impede multi-point teleconferencing for training by law enforcement, government, education, health services, and disaster planning managers. Increased institutional connection would create more sites for live productions in both Portland and east Multnomah County.  Mt. Hood Community College cited difficulty in providing a signal to ED-NET, located on Portland=s west side at Oregon Public Broadcasting.  Such a connection would open the door to Mount Hood Community College and other community colleges statewide to take advantage of the unique learning opportunity each institution offers.  MCTV and PCA would like a hardware connection between them in order to share government and other programming of regional significance.

- Linkage to other regional telecommunications providers should be required.  These providers could include cable companies, public Internet carriers, telephone companies, competitive access providers, or government networks.   All organizations in the institutional ascertainment expressed a need to communicate with similar organizations outside the local area (regional, national, international). Paragon is extending fiber optic cable links to some cable companies in surrounding areas and these efforts should be encouraged.  Government agencies, schools, and libraries identified common general application networks for geographic information systems, E-mail, Internet access, and linkage of local area networks among many sites of the same organization that are outside the franchise area.

**3: *BANDWIDTH MANAGEMENT*. Community bandwidth must be managed as a finite resource by its users.**

Community bandwidth as used here pertains to all of the bandwidth dedicated to community use, including schools, government agencies, libraries, nonprofit groups, civic organizations, and the public. Bandwidth is managed in the way it is allocated, priced, and marketed.

Current management of this resource is shared by community users as well as the cable company. For example, community access organizations manage public bandwidth set aside on the residential system. Both the east county and Portland franchise agreements require the cable company to market and promote use of the public bandwidth on the institutional network (I-Net).

The ascertainment process reveals two principal things that pertain to bandwidth management. First, stakeholders expressed interest in similar applications on community bandwidths (e.g., E-mail, video programming, access to the Internet). The implication of these overlapping, competing interests is that stakeholders will need to develop partnerships in order to share bandwidth and to better manage this resource. Second, the cable company has not developed and marketed the I-Net=s potential for public use. The I-Net ascertainment concludes that users themselves should take on this responsibility.

The following points illustrate this need:

• There are practical limits on the amount of bandwidth that the cable company will make available for community use. Community users have an obligation to make efficient use of this resource, especially when they anticipate a need for additional allocation of bandwidth from upgraded system capacity.

X Bandwidth or channel allocation is going to be defined and driven more by the nature of the application than by who is using it. In the short term, shared applications or common need applications among stakeholder groups will probably take precedence over point-to-point applications by single users. As the cable company develops a high bandwidth infrastructure, the additional capacity will enable growth in point-to-point uses.

X There are several successful bandwidth management models in the area from which useful experience has been gained. The Metropolitan Area Communications Commission (MACC) in Washington County markets, oversees technical performance, set rates, and allocates bandwidth for Columbia Cable=s institutional network. MCTV manages all the access channels for east Multnomah County, balancing the needs of many users such as Mt. Hood Community College, east county school districts, government agencies, citizens, and community organizations. The Community Access Network (CAN) is one channel shared among all access providers. All providers collectively determine program schedules, provide programming and market the channel.

X Both MCTV and PCA expressed interest in managing a public E-mail and Internet network which would be available at no or low cost to nonprofit organizations, public agencies, and community members. In order to provide such a service, the

technical consultant recommends the managing agency administer addresses, evaluate, and recommend interface equipment, observe traffic patterns and bandwidth saturation, establish and collect fees for services, and market the network to community users.

- The ascertainment of public institutions identified bandwidth prioritization for both residential and institutional systems of the future as a major problem, especially when bandwidth is not sufficient to meet all stakeholder needs. As a result, the technical consultant recommended that the franchise agreement establish a procedure for allocation of scarce bandwidth for community uses.

- The technical consultant also noted that a public network will not reach its potential simply because fiber optics or high bandwidth capability is provided. It must also have a management structure that provides marketing, pricing, testing, and a method of allocating bandwidth.

- In the institutional ascertainment, users and potential users of the I-Net most commonly identified the following kinds of concerns about the existing I-Net system: lack of documented rate structure and equal rates for all users, difficulty in prioritizing who gets access to the system, lack of equipment standards for connecting to the system, and a fear that shared channels would not be properly managed, resulting in a capacity problem over which users have no control.

- Current demand for use of I-Net is creating the need for shared use policies.

**4.** *UNIVERSAL ACCESS.* **Universal access to communication technologies, especially emerging technologies, must be improved.**

Universal access of community members to communication technology includes outreach activity, physical access to production technologies (hardware and software), access to distribution systems, and access to both technical and media literacy training. It should be stressed that universal access cannot be successfully achieved if any of the above elements is excluded.

Historically, the purpose of access centers was to remove physical, financial, and skill barriers to use of video communication technology by citizens and community groups. The purpose of access remains the same, but emerging computer-based, digital technologies have raised the stakes. These technologies are becoming central to the way that people and communities share information, engage in public dialogue, and address issues. For example, in MCTV=s ascertainment effort, east county citizens identified universal access to communications technology as a key opportunity for the community to effectively address critical issues such as growth, diversity, crime, jobs, and education.

The ascertainment process revealed these common needs for universal access to cable technology:

- Over half of community group respondents believe it is Avery important≅ that communication technologies be made available to them at  no cost or low cost over

the next ten years, including public information kiosks, community centers that provide equipment and training in use of video and computer technology, and access to the Internet and E-mail.

- Participants in MCTV=s needs assessment identified universal access to communication technology as a top priority and opportunity if the community is to avoid creation of an underclass of the Ainformation poor.≅ This sentiment is echoed in the PCA ascertainment report, which notes that the cost of acquiring computer hardware, software, on-line services, and training erects barriers to people with constrained means and poses the danger of creating a Atechnology underclass≅ that does not participate fully in society and the economy. Both MCTV and PCA indicated that providing universal access to new technology, is central to their organizational missions.

- Public institutions also have a practical stake in universal access. Since most government agencies, schools, and libraries participating in the ascertainment process stated that it would soon be feasible and desirable to provide services and information by interactive computer connections, a broader system of access will enable public institutions to better serve constituencies. Both pubic institutions and community organizations recognize the need for their constituents to have low or no cost access to communications resources like public kiosks, technical equipment, and training in the use of the equipment.

- Lack of funds poses a difficult barrier in providing universal access. Community groups, access organizations, schools, and libraries all expressed concern for funding in the various ascertainment surveys. Even though both access organizations are moving away from franchise-generated funds as the only revenue stream to maintain current services levels, PCA and MCTV expressed great concern about the availability of future franchise-related funds to provide universal access to emerging technologies. Funding for outreach activities, training, and equipment will need to be provided through the franchise agreements.

- Outreach is particularly important if universal access is to include the traditionally under served segments of our population. One aspect of outreach, highlighted in MCTV=s report, is the ability to easily transport technology to an organization=s site. This includes the training, equipment, and in some cases, the actual access point to the distribution system. This mobile technology helps constituencies overcome cultural and physical barriers to using communications technology. Another aspect is staff-produced programming. As evidenced by the large volume of letters from ethnic, cultural and other community organizations to PCA and MCTV, staff assisted productions help special segments of the population effectively use cable television to convey their messages. Under the Portland franchise, the cable company also provides staff assisted programs for Black Community Television (BCTV). BCTV provides a forum for Portland=s African-American community to address issues of importance.

**5.** *TECHNICAL PERFORMANCE.* **High performance standards for maintenance and operation of public components of the system should be established and met.**

If the portion of the cable system dedicated to public use is to enjoy user confidence and to grow, it needs to be technically reliable and secure, and it must be able to accommodate emerging communication technologies. Therefore, standards and procedures for public system maintenance, service, and connectivity need to be adopted and enforced. These standards and procedures must meet or exceed those for the commercial applications of the system.

The following points support this need:

- MCTV and PCA stated that in order for them to provide for public use of the cable system, all public channels and connections on the cable system must be maintained at the same standards as all other commercial channels provided by the cable company.

- Commonly perceived needs by government agencies, schools, and libraries to use the cable system=s technology included high reliability, security, easy maintenance, and quick repair. Conversely, several of the main reservations expressed by public institutions about using the cable system=s current I-Net relate to reliability, security, and repair response times.

- The technical consultant recommends 1) that sufficient cable company staff be dedicated to the institutional network to insure that system response time and failures are given priority equal to the residential system, 2) that the cable company distribute summary results of testing to potential users to demonstrate performance, and 3) that when the company converts feeders from the fiber backbone on the residential system, it should also place fiber to area institutions.

- The technical consultant recommends that institutional networks or other public capacity be tested to the same specifications on the same schedule as the residential system in both forward and reverse directions to ensure system performance. Specifications for performance should be developed in conjunction with public users of the system in order to promote buy-in and clarify expectations.

## COMMUNITY NEEDS ASCERTAINMENT

## JUNE 1995

## ATTACHMENTS

1.    Community Groups Survey Results
      Prepared by: MHCRC Staff and Research for Marketing
      (blue divider)

2.    Public Institutions Needs Ascertainment
      Prepared by: Pacific Netcom
      (yellow divider)

3.    1995 MHCRC Survey of Cable Subscribers
      Prepared by: Research for Marketing
      (pink divider)

4.    1995 MHCRC Survey of Non-Subscribers
      Prepared by: Research for Marketing
      (peach divider)

5.    Community Needs Assessment for East Multnomah County
      Prepared by: Multnomah Community Television
      (green divider)

6.    Community Media Needs Ascertainment
      Prepared by: Portland Cable Access
      (red divider)

7.    Public Hearing Testimony: May 15, 1995
      MHCRC Hearing Regarding Future Communication Needs
      (goldenrod divider)

8.    Cable System Technical Evaluation
      Prepared by: Pacific Netcom
      (orange divider)

**COMMUNITY GROUPS SURVEY RESULTS**

**COMMUNITY GROUPS AND NON-PROFIT ORGANIZATIONS**

**COMMUNICATIONS AND TECHNICAL NEEDS SURVEY RESULTS**

**JUNE 1995**

# EXECUTIVE SUMMARY

## Introduction

The Mt. Hood Cable Regulatory Commission is engaged in a process to renew the Paragon Cable franchise agreements for Portland and East Multnomah county which serve areas east of the Willamette River to Corbett. As part of the renewal process, the Commission is conducting an ascertainment of future communications needs and interests in order to determine a public benefits package for the new agreements.

The ability of community groups and non-profit organizations to use the cable system's technology for communications with their constituencies and clients will be an important part of the public benefits package. In order to assist the Commission in understanding these groups' communication and technology needs, the Commission conducted a survey of community and non-profit organizations in Multnomah County. The results of the survey are contained in this report and will assist the Commission in developing future community uses of the cable communications system.

The Commission mailed surveys to 462 organizations and 93 responded -- a 20 percent response rate. The responses provide a good sampling of non-profit organizations' current uses of communications technology and desires for future uses.

## Community Groups Future Communications Needs and Interests

In order for non-profit organizations to use technology to communicate with their clients and constituencies in the future, they must have virtually no-cost connections or points of access to distribution systems and adequate equipment within their organizations. In addition, equipment and training on technology use must be available to their clients. These areas were identified as the top three barriers to using technology to reach clients.

Consequently, the organizations believed it is very important that the following communications resources be available to them at no or low cost over the next ten years: information kiosks located in public places; community centers where training and equipment are provided on use of video and computer technology; and access to the Internet and E-mail. Organizations also placed importance on availability of channels for community group's programs on basic cable service; video conferencing; and video origination points allowing organizations to cablecast an event live.

Community access channels and resources have become, and will continue to be, important communications resources for non-profit organizations. According to the survey, community access channels are used more often as a communication means than commercial television or radio mediums. Community groups anticipate increasing their use of access channel capacity,

equipment and training over the next ten years, and groups who don't currently use access channels expressed great interest in basic video communications such as listing events and activities on a video bulletin board and cablecasting Public Service Announcements (PSA) on access channels.

**Current Use of Communications Technology**

The sampling of community and non-profit organizations indicated that nearly all (98%) of their staff members or volunteer leadership have a telephone. This percentage did not vary based on staff size of organization. However, availability of both fax machines and computers decreased with organizational staff size. For example, 92 percent of staff members with organizations with organizational staff sizes of 17 people or more have access to a fax and 81 percent have computers. In contrast, in organizations with one staff member or only volunteer leadership, 41 percent have access to a fax and 62 percent have computers.

Availability of Internet access or E-mail for staff or volunteer members was low for all groups and staff size had little impact on availability. Only 32 percent responded that they have access to E-mail and 28 percent to the Internet.

The telephone and print media are currently the most widely used method of communicating with constituents and clients. Fax and direct mail were identified as the second most common method. Community access channels were identified more often as a communications means than was TV/radio advertising or coverage, and E-mail or Internet use.

In order to maintain and improve their level of service, organizations stated that they are most likely to invest in telephone technology over the next five years. They also attached a high level of importance to investing in voice messaging, Internet connections, fax, E-mail and video technologies. Organizations placed a low priority on video conferencing for internal technology investment.

The organizations surveyed expressed a relatively strong need to communicate with people in their organization, the general public, and other organizations. They expressed less of a need to communicate with specific segments of the population and elected officials.

When asked to state what the barriers were to communication, the following themes emerged. First, time constraints on staff and volunteer leadership surfaced most often. People in non-profit and community organizations believe they just don't have the time to effectively communicate within or outside of their organizations. Secondly, the organizations have difficulty identifying effective ways to access the general public and elected officials. And third, funds to implement communications creates a barrier for most organizations.

The organizations were also asked to identify barriers to using technology to communicate with their constituents and clients. Organizations, whether large or small, agreed that funds for

ongoing connections charges for Internet and E-mail access , client funds for equipment and training to use technology, and adequate equipment within the organization were the top three barriers to using technology to reach their constituencies.

**Use of Cable Technology in Communications with Clients and Constituents**

The survey showed that a total of 25 percent of organizations responding currently provide programming on the community access channels; 75 percent indicated that they have not used community access resources.

Organizations currently providing programming on cable access channels stated that their use of community access resources would increase or stay about the same over the next 10 years.  Not one organization indicated that their use would decrease.  Of the community access resources identified in the survey, use of channel capacity will have the greatest increase, followed by training classes and equipment.

The ability to produce and cablecast public service announcements (PSAs) and to list an organization's events, meetings and activities on access channels generated the most interest from organizations not currently using community access resources.  Other possible uses also generated interest: (in descending order of interest) ability to air nationally-produced programs; live television coverage of an organizations' events and activities; having staff or constituents trained to enable them to produce programming; and live meeting coverage with the ability for people to call-in comments or testimony.

Regardless of whether or not an organization was currently providing programming on the community access channels, organizations surveyed indicated the following resources would be very important to have access to at no or low cost over the next ten years: information kiosks located in public places like shopping malls and libraries; community centers where training and equipment would be provided on use of video and computer technology; and access to interactive data bases, the Internet and E-mail.  Those that would be somewhat important included cable channels for community programs available on basic service; teleconferencing; and video origination points allowing an organization to cablecast an event live from where it is taking place.  Those that would not be too important to have access to included live, interactive origination points which allow viewers to participate in a meeting by telephone and two-way closed circuit video.

**Differences between East County and Portland Oriented Groups**

Organizations were asked to self identify their geographic service area in an attempt to discover if there were differences between groups that serve East Multnomah County and Portland.  Seventy-three percent stated that they served Multnomah County or the larger metropolitan area.  Only 18 percent target services only to East Multnomah County and eight percent to City of Portland.  These small percentages do not provide a good representative sampling of

organizations.  Therefore, statistical tabulations and analysis has not been provided for East County or Portland only organizations.

# SUMMARY OF STATISTICAL ANALYSIS

## CHARACTERISTICS OF RESPONDING ORGANIZATIONS

**Focus of the organization:**  
| | |
|---|---|
| 34% | social or human services |
| 31% | arts or cultural |
| 22% | neighborhood or community group |
| 11% | issue or political advocacy |
| 8% | trade or professional |
| 8% | environmental |
| 2% | media access |

**Number of paid staff people:**  
| | |
|---|---|
| 24% | one or less staff person |
| 24% | two to five staff people |
| 26% | six to 16 staff people |
| 26% | 17 or more staff people |

**Sixty percent of the organizations operated in one site, while 40 percent had more than one site with an average of five sites.**

**Geographic service area:**  
| | |
|---|---|
| 63% | serve greater metro area or larger |
| 18% | serve East Multnomah County only |
| 10% | serve Multnomah County |
| 8% | serve Portland only |
| 1% | serve Happy Valley only |

**Target services to particular segment of population**

| | |
|---|---|
| 11% | children and families |
| 8% | seniors |
| 8% | ethnic, cultural and sexual minorities |
| 7% | women |
| 5% | disabled |
| 5% | low-income and homeless |

<u>STATISTICAL RESULTS SUMMARY</u>

| **Need to Communicate (scale to 50)** | | **Barriers to Communication** |
|---|---|---|
| People in organization | 45.8 | time constraints (40%), availability (21%), money (17%) |
| General Public | 41.9 | access (51%), awareness (22%), staff time (15%) |
| Other org., or agencies | 39.8 | time constraints (40%), resources and money (28%) |
| Specific Segment | 38.5 | exposure (36%), cost (35%), money/time (11%) |
| Elected Officials | 34.1 | time constraints (35%), access (27%), money (23%) |

**Current Access to Technology**

| | | |
|---|---|---|
| telephone | 98% | no variance among organization size |
| fax machine | 75% | progressively higher/larger organization (41% less than 1 to 92.2% for 17 more) |
| computer | 69% | progressively higher/ larger organization (62% for less than 1 to 81% for 17 more) |
| E-mail | 32% | little variance among organization size |
| access to Internet | 28% | no variance among organization size |

**Investment in Future Technology (Importance Next Five Years)**

| | Very | Fairly | Not |
|---|---|---|---|
| telephone | 59% | 26% | 15% |
| voice messaging | 41% | 32% | 27% |
| fax | 39% | 31% | 30% |
| E-mail | 37% | 29% | 34% |
| Internet connection | 32% | 40% | 28% |
| video | 29% | 37% | 34% |
| video conferencing | 14% | 24% | 62% |

**Current Communication Tools with Constituents and Clients**

| | |
|---|---|
| overall | telephone 99%, print media 90%, Fax 73%, mail 63%, access channels 33%, TV 27%, radio 23%, E-mail 18%, Internet 11%, marketing video 5%, video conferencing 2% |
| 1 less staff | print media (100%), mail (100%), telephone (94%), access channels (39%) |
| 2 to 5 staff | print media/telephone (100%), fax (89%), tv (57%), access channels (44%) |

| 6 to 16 staff | telephone/mail (100%), fax (95), print media (84%), access channels 37% |
| 17 more staff | telephone (100%), fax/print media (89%), tv/radio (67%), mail (33%) |

**Barriers to Using Technology**

Results did not vary by organizational size.
(Scale to 50)

| | |
|---|---|
| Funds for ongoing connection charges | 40.8 |
| Client funds for equip/training | 40.7 |
| Adequate equipment within org. | 39.0 |
| Client access to computer/video equipment | 36.6 |
| Client or constituent knowledge for use | 35.9 |
| Staff knowledge or training | 31.2 |
| Client acceptance of technology | 29.6 |
| Staff acceptance | 24.2 |

**Use of Access Resources**

25% of orgs. use access channels

Use increases with organizational size (39% of 1 or less staff use access channels to 5% with 17 more staff)

Access use for future: ( no one identified a decrease in use)

| | | |
|---|---|---|
| channel capacity | 67% increase | 33% stay same |
| equipment | 33% increase | 67% stay same |
| training classes | 50% increase | 50% stay same |

For organizations that haven't used access resources in the past: interest in next 10 years (scale to 50)

PSAs (43), bulletin board listing (42), nationally-produced videos (35), live event coverage (35), training (34), live call-in (27)

1 less staff    live event coverage (50), bulletin board (50), PSAs (50), staff trained (44), nationally- produced videos (42), live call-in (42)

2 to 5    bulletin board (49), PSAs (49), live event coverage (34), training (33), nationally- produced videos (33), live call-in (27)

6 to 16    PSAs (43), bulletin board (35), nationally-produced videos (33), training (32), live event coverage (31), live call-in (22)

17 more staff   bulletin board (41), PSAs (38), nationally-produced videos (35), training (33), live event coverage (33), live call-in (26)


**Importance of Technology Available at Low or No Cost Over Next 10 Years**

| | |
|---|---|
| information kiosks | 53% (very important) |
| training, equipment at community centers | 51% |
| interactive data bases, Internet, E-Mail | 51% |
| channels for video on basic service | 46% |
| teleconferencing | 36% |
| live origination points | 35% |
| live, interactive origination points | 33% |
| two way closed circuit video | 22% |

1 less staff   live origination sites (53%), information kiosks (44%), training/equipment (39%)

2 to 5 staff   training/equipment (59%), channels (50%), information kiosks (44%)

6 to 16 staff   information kiosks (60%), training/equipment (50%), channels and live interactive (44%)

17 more staff   information kiosks and teleconferencing (63%), training/equipment and channels (53%)


**Interest in participating in ongoing telecommunications planning: 54% responded positively**

**List of Sites Identified as Possible Live Origination Points** (Only listed those on eastside)

Benson High School
Coliseum (5)
Dahlke Manor (? address)
Five-Mile Station, Sellwood
Francis Community Center (? address)
Gresham City Hall (3)
Historical St. John's Theater
Interstate Firehouse Cultural Center (2)
K-BOO
King Facility
Libraries (5) (Gresham Regional Library)
Lloyd Center Food Court
Matt Dishman Community Center

METRO
Mid-County Senior Center
Mt. Hood Community College (6) (Art Center Auditorium)
Mt. Tabor Water Square
Multnomah ESD
OMSI
Oregon Conference Center
Portland Community College, Cascade (2)
Portland Convention Center (4)
Portland Neighborhood Coalition Offices
Sam Cox Building, Troutdale

**PUBLIC INSTITUTIONS NEEDS ASCERTAINMENT**


Please Note:    Appendix A listed in this report is not included.  If you wish to
receive a copy of Appendix A, please contact the Cable
Communications Office.

**1995 MHCRC SURVEY OF CABLE SUBSCRIBERS**

Please Note:   The Introduction, Viewer Comments and the Survey
Questionnaire listed in this report are not included.  If you wish
to receive a copy of these, please contact the Cable
Communications Office.

# 1995 MHCRC SURVEY OF NON-SUBSCRIBERS


Please Note:   The Resident Comments and the Survey Questionnaire listed in this report are not included.  If you wish to receive a copy of these, please contact the Cable Communications Office.

# COMMUNITY NEEDS ASSESSMENT FOR EAST MULTNOMAH COUNTY


Please Note:   Appendix A listed in this report is not included.  If you wish to receive a copy of Appendix A, please contact the Cable Communications Office.

**COMMUNITY MEDIA NEEDS ASCERTAINMENT**


Please Note:    Exhibits 4-26 listed in this report are not included.  If you wish to receive a copy of the Exhibits, please contact the Cable Communications Office.

**PUBLIC HEARING TESTIMONY: MAY 15, 1995**

# CABLE SYSTEM TECHNICAL EVALUATION