



UMPQUA ECONOMIC DEVELOPMENT PARTNERSHIP



Strategic Plan 2018-19

VISION

To support prosperous and diversified communities that provide quality jobs for all Douglas County.

MISSION

To align our energy and resources on growing our own: To develop and expand our workforce to meet the needs of local employers as well as to partner in the expansion of workforce housing. To foster a new generation of youth with a focus on career paths and young entrepreneurs with an ambition to launch new businesses. To bring new people to our communities to experience The Great Umpqua so they will, in turn, want to move here and companies will follow. To create a new Douglas County Brand that builds a bridge into our future.

BACKGROUND ASSUMPTIONS

“Traded sector” is an essential touchstone of The Partnership’s work, but does not mean that manufacturing is the exclusive focus. However, this does not include only industrial manufacturers. Many business services companies, such as customer contact centers, sell their services to broader markets. Many elements of sectors such as hospitality and higher education compete for customers at this larger geographic scale and can drive economic activity. The leakage of economic activity that occurs when consumers travel to other commercial centers for retail or other critical services not available locally continues to have a real negative impact. To focus only on attracting ‘new’ big companies is hurting our efforts.

Our work is grounded in data and the reality of constraints—but, to be beneficial, we must consider strategies that are forward-looking and can shift fundamentals. Douglas County is a rural community with a relatively blue-collar workforce and an economy that has been traditionally heavily-focused on natural resource-based industries. This plan has developed in the context of the long-term trends of the regional economy that has evolved through both quantitative and qualitative research. However, there are excellent examples around Oregon and the nation of communities that faced similar constraints, but through concerted action by private and public actors, have achieved significant economic transformations.

Founding Partners: Douglas County Industrial Development Board, City of Roseburg, CCD Business Development, Roseburg Area Chamber of Commerce ♦ *Sustaining Sponsors:* Cow Creek Band of Umpqua Tribe of Indians, Mercy Medical Center, Avista Utilities, North River Jet Boats, Jordan Cove LNG, Douglas ESD ♦ *Vision Sponsors:* Pacific Power, Umpqua Bank, Umpqua Community College, First Call Resolution, Umpqua Training & Employment

The Partnership is not just our name. One of the most significant strengths of Douglas County is the power of the sense of community. The quality and durability of local institutions, from The Ford Family Foundation to Umpqua Community College, to the Community Cancer Center, to the Industrial Development Board, are evidence of the resources in the area that can and are regularly mobilized to address community needs. To be effective, The Partnership must always look for opportunities to work with individuals and groups around the County and work to develop broad-based support for the critical strategies outlined here.

DOUGLAS COUNTY STRATEGIC PLAN

The purpose of this document is to frame the strategic direction for The Partnership and outline the various initiatives it will undertake, how it will seek to accomplish them, and describe some criteria for success for each of the efforts.

To understand the framework of these initiatives it is essential first to describe a strategic philosophy for the organization.

Strategic Philosophy

The four central values best characterized the strategic view. These four values are:

- Leveraging partnerships
- Looking for and acting on opportunities
- Look for opportunities to convene
- Don't reinvent the wheel

These core values share a common thread. The Partnership will look for opportunities to find what is already happening and work here and outside our County, and through the process of making connections, convening, and forming partnerships, it will amplify these activities and seek to focus their output.

The key to this approach and philosophy are the need to build trust with partners. Building and facilitating trust networks amongst all the partners is key to creating a resilient and responsive organization, and, from a resource perspective, leverage the resources that are already available and engage those who can bring additional resources to the table to bring about outputs.

Wherever possible, The Partnership will look to leverage and align already existing resources and activities to create force multipliers where more impact can be set up without requiring more effort or resources.

While taking on a convening role, The Partnership will seek to identify gaps and opportunities, and convene other organizations and individuals to address these deficiencies, including looking for ways to obtain and align resources, and leverage those resources to get additional support through whatever means is appropriate (e.g., grants and fundraising).

When necessary, The Partnership will take the lead in forming organizations or initiatives to get things moving but will look for ways to hand these off and proceed to the core focus areas and competencies of The Partnership.

The Partnership will look to develop and focus on its critical competencies of convening and maintaining the network of resources, leaving the management and execution of each initiative to the organization most suited to manage and sustain the effort and create a sustainable model for its ongoing support.

The Partnership sees itself primarily as a catalyzer of activity. It initiates and convenes, and then steps out of the way once the thing is stable, ready to look for the next opportunity to ‘spark’ the next thing. The Partnership will take the approach of ‘start it, prove it, hand it off’ when possible.

STRATEGIC PILLARS and ORGANIZING ONGOING EFFORTS

The Partnership has six Strategic Pillars:

1. K12/UCC: Projects: Backpack, baseball cards, camps, clinics, etc.
2. Entrepreneurial Development: Pre-seed fund, Start-up Weekend, SBDC, Education, YES/Pub Talks.
3. Workforce: “Grow our own,” Find ways to develop a workforce fit with DC needs. Welding model used for other industries, K12, UCC, Timber Tech.
4. Events: Profit model for The Partnership, bring people to Douglas County and businesses will follow, direct the changing culture tied to re-branding.
5. Rebranding Douglas County: Grow Douglas County to be a place where people and business want to be!
6. Retention/recruitment/expansion: Work with every business in Douglas County that needs our help. Collaborate with every company that intends to move to DC.

Organized and subcategorized into three categories that reflect similarity and overlap in activities and outcomes. These three types are:

1. Growing our own
2. Catalyzing the community
3. Getting the word out

The strategic pillars fit into each of the categories in this way:

1. Grow our own
 - a. K12
 - b. Workforce
 - c. Business Retention and Expansion (separated from Recruitment)
 - d. Entrepreneurship
2. Community Involvement
 - a. Events
3. Getting the word out
 - a. Rebranding Douglas County
 - b. Business Recruitment (separated from BRE)

GROW OUR OWN

To build the community and take charge of our future, we must focus on using what we must grow our own. We need to do this at all levels.

- We need to assist local business in all the ways we can to ensure they can grow to their full potential.
- We must support the new companies that are looking to start in our community.
- We must begin looking to create pathways for the people who already live here to find well-paying and meaningful work in our community.
- We must focus on the next generation of residents by creating channels to employment for students so that they will remain in the area.

We will do this by acting as a liaison, matchmaker, identifier, mediator, and facilitator. We will undertake the role of identifying areas of opportunity and convening partners so that they can work together to find solutions.

The nature of this work is that it is proactive. The Partnership must initiate the effort and catalyze the activity.

The primary role of The Partnership is to instigate and start programs that address identified needs and convene and organize the resources that will meet the needs.

It will be important here to set expectations with all partners and parties involved. Unless it is made clear The Partnership intends NOT to be leading the initiative for the long-term, and try to create a pathway to hand off the action; The Partnership will end up ‘owning’ every effort it starts, which will strain resources.

We can separate out the “Grow Our Own” efforts into four categories:

1. K12 - Focus on creating pathways for students to meet employer needs.
2. Workforce - Work directly with company needs and workforce development groups.
3. Entrepreneurship - We will work to facilitate the creation of conditions and programs that support ‘homegrown’ business efforts.
4. Business Retention and Expansion - We will work with local business to understand their needs and bring people together to create solutions.

Connected by a common thread, these initiatives are similar in the type of activity that The Partnership will undertake, which is, assessing the need, convening the right partners to address the need, and creating a pathway to ‘hand off’ the initiatives.

The key to growing our own is developing an understanding of the needs of the existing local businesses. We will be proactive in reaching out to local companies to assess needs.

We will, at least annually:

- Survey local businesses to include the “top 100” to assess current needs (or identify and collect this information if it already exists).

- We will take this list, and out of the feedback given, select five ‘high priority’ needs to address, distribute this to the businesses, and, at least annually, provide a report to all the companies surveyed on progress made on any initiatives or actions taken to address the needs.

Each of the above initiatives has a component that can address the direct requirements of the local employers and industries.

- Workforce development efforts can directly address gaps identified by employers.
- K12 Education can prepare students to work in the industries in our communities and better prepare students to succeed in the local economy.
- Business Retention and Expansion efforts can align the resources needed for our local companies to achieve success.
- Entrepreneurship can be used to address several of the needs identified by the ongoing assessment of the local needs. According to Kaufman, 100% of all net new jobs are created by companies under five years old!

Much of this information exists but is not likely to be collected in one place. Many agencies gather needs assessments but often do so in a silo, where they are only looking to the needs covered by their company. The Partnership can collect all this data and organize it into one place, and then organize and track all the work that is being done on these initiatives (often in isolation) and find ways to bring everyone together to maximize impact.

The Partnership will continue to work to expand on existing efforts, work to find a place to handoff these activities to the appropriate organization to carry the torch where possible, and will continue the work until leadership identifies a suitable partner.

These activities are listed below:

Business Retention & Expansion (BRE)

1. Business visitation program. Visit with top ~75 traded sector companies every 12 to 18 months. Meetings conducted with Business Oregon and local officials focus on gathering information about the economic health of the business (including opportunities, planned projects, workforce and other needs or challenges). Building relationships with the principal decision-makers; and identifying areas where The Partnership and other resources can be leveraged to support business growth and development.

- Key outcomes: Referrals & identification of BRE projects.

2. BRE projects. Projects identified through the visitation program or other channels through which The Partnership, working in concert with other agencies (Business Oregon, CCD, SBDC, OR Solutions, etc.), assist the local company with an issue. Joint projects include assistance with securing business financing, incentives and other resources necessary for expansion; addressing regulatory hurdles to continued efficient operations or expanded operations; and plans to support workforce training and education.

- Key outcomes: Development of employment & business retention.

3. Support of industry collaboration. At times, assisting multiple companies with critical issues can best be achieved through industry collaboration. The Partnership can play a central role in “incubating” long-term efforts or will organize “one-off” events to address a given concern. An example of a “one-off” event was a recent workshop on business transition planning. A longer-term effort is “LeanLink,” a peer-to-peer learning network developed to advance knowledge of continuous process improvement and related disciplines.

- Key outcomes: Expansion of employment & business retention.

4. Electronic newsletter. Regular communication (quarterly) keeping the local business community aware of crucial statewide economic developments, resources, training opportunities, and local business news.

- Key outcomes: Business retention & visibility for The Partnership.

Workforce Development

1. Participate at the leadership level with South West Oregon Workforce Investment Board and local workforce development efforts (e.g., Douglas County Partners for Student Success) to help drive strategies to address actual local employer needs.

2. Assist in the identification and acquisition of resources to expand understanding of local workforce challenges and to address those needs.

- Key outcomes: Improved quality and engagement of emerging workforce. Targeted application of necessary workforce resources.

Entrepreneurship

1. Assist in the creation of an early stage pre-seed fund. The goal of the fund is to get people to show up and get the help and guidance they need, to create visibility into the pipeline of potential new startup companies, and to coordinate the support resources to reduce duplication of effort and maximize the effectiveness of the resources already available. (UBC/ SBDC)

- Key outcome: Creation of an early-stage fund. Increased usage of existing support resources.

- Key result: Transition to Umpqua Business Center and others whose core functions support early-stage and start-up businesses. Continue to play an advisory and facilitative role, while reducing and limiting staff time devoted to the effort.

Proposed Action Item: The Partnership will work to create metrics for success to track progress toward the outcomes listed in bold above, as well as establish parameters for success for each subsequent project or initiative undertaken.

Proposed Action Item: Create a dashboard to track all initiatives, contacts, assists and any associated metrics. Create or secure a lightweight CRM solution to track engagements, interactions, assists and project progress.

Proposed Action Item: Create a way to follow the percentage of ‘touches’ both inbound and outbound. The assumption is that proactive outbound activity will lead to an increase of incoming activity without additional resource added. Present inbound/outbound is 50/50.

Proposed Action Item: Create a model and methodology for expectation setting for partners to prepare them for a ‘handoff’ and create a model for handing off each initiative in a clean way.

Proposed Action Item: Board of Directors will work to build a network resiliency plan. Right now, the system is centered on Wayne and the trust he has created. The step should be taken to make sure there is a way to rebuild the system in a ‘disaster’ scenario so that work can continue without starting over from scratch.

Proposed Action Item: BRE “Reverse Pitch.” Local companies pitch their problems to entrepreneurs as problems to solve.

CATALYZING THE COMMUNITY

Events

Engaging the ENTIRE community in the efforts of The Partnership is key to its success. Without broad community support, the efforts will struggle, and often viewed as working against the goals of the entire community or be seen as an initiative that supports a particular segment of the population. Events are a way to engage and galvanize the community, educate the community on the efforts it is working on, and engage stakeholders and partners.

It is essential to building trust with both partners and the community, and events are a vehicle to create a foundation on which to build that confidence, both with potential partners and with the area as a whole.

Events are a way to generate revenue that will support the efforts of The Partnership, allowing it to expand its resource base to become more impactful. The events are a means to an end of satisfying the financial needs to impact our community positively.

The goal is to create self-contained events that generate revenue and are self-supporting and ideally can become a source of stable and predictable income for the activities of The Partnership. Additionally, events are a mechanism to engage partners in the initiatives being worked on by The Partnership and act as an avenue to develop relationships with organizations or individuals who are open to providing more direct support to the activities.

Where possible, events can be created to leverage resources toward initiatives that are being worked on by The Partnership in Workforce, Business Retention, and Expansion (see above), and to create content and activity that will help to get the word out (see below).

Also, proactively crafting messages for the community about the goals and activities of The Partnership to actively ‘win over’ the community and ideally prevent ‘fire drills’ from community backlash based on misperception or suspicion.

Proposed Action Item: Create of the minimum one community event a year that is self-supporting.

Recommended Action Item: Create a clear marketing message for local distribution and education and determine the best channels to distribute this information. (note that events are an excellent way to do this)

GETTING THE WORD OUT - growing by attracting the right people

The nature of this work is that it can be, in part, reactive. The Partnership must organize resources to quickly and efficiently react to inbound interest.

The Partnership will be proactive in getting the word out by creating a clear brand that is attractive to prospective companies. Having a clear target of desired enterprises that support already existing sectors and industry clusters, and being clear in the message so that inbound requests become aligned and are the 'right fit' for Douglas County.

Branding Douglas County

1. Marketing: Convene and get consensus on a branding initiative. Promote the use of 'The Great Umpqua' as a way to include all stakeholders and amplify the message.

- Key outcomes: Identify a reliable marketing partner to help craft an outbound message and determine best channels for distribution.

Business Recruitment

2. Lead response. Responding to requests for information from State partners and direct contacts requires regular maintenance of essential information on sites, workforce data, etc. A related effort is regular communications (quarterly) to "warm" leads from prior recruitment efforts.

- Key outcomes: Responses provided, visits, business recruited, jobs created.

3. Marketing. Maintenance of The Partnership website (and overall web presence with up-to-date information required by site selectors and others seeking business locations

- Key outcome: Internal leads generated.

4. Lead generation. Identification of the primary decision makers and direct marketing to those decisions makers in selected industries of opportunity. Likely trade targets include secondary wood products manufacturers, distribution, and data centers.

- Key outcomes: Internal leads generated & business recruited.

5. Industrial site preparation. Work to bring local industrial sites to development readiness will include efforts such as RSIA Designation, Site Certification, and projects to ready County industrial parks for development.

- Key outcomes: Projects completed.

Proposed Action Item: Create a clear marketing message for local distribution and education and determine the best channels to distribute this information; events are an effective means to accomplish this messaging.

Proposed Action Item: Create a resource map of all related parties involved in recruitment and align and assign roles and responsibilities for each organization.

ORGANIZATIONAL DEVELOPMENT OF THE PARTNERSHIP

- Outcome-Based Management: Quarterly review of quantitative performance metrics; annual report of work plan; semi-annual review of the strategic plan.
- Membership Development: Targeted recruitment of new members will be decisive and based on a vital selection of bringing on missing key community stakeholders (e.g., VA). Organizations that have strategic value (media, CPA firms, realtors); groups that could potentially reach \$1K+ sponsorship levels; and manufacturing/traded sector businesses.
- Communications/Internal Marketing: The Partnership has a vital role to play in sharing information about companies' successes and positive trends with the community.

EXISTING INITIATIVES AND ACTIVITIES NOT CONSIDERED CORE TO THE ORGANIZATION.

Current efforts in this set of activities include (key output in bold). The actions listed below represent active efforts and initiatives that are considered significant opportunities to pursue but are not considered core to the organization. These efforts are not expected to continue forever, and ideally, are opportunities that will be handed off as soon as it is possible to do so.

Wine Industry & Tourism

The strength of the fundamentals of the local wine industry (climate, accessibility, the Southern Oregon Wine Institute, a track record of innovation, and investment trends) are significant. The sector (travel and tourism) is one where expansion trends at the State and national level are strong. Recognizing these realities, The Partnership researched with local industry actors to identify strategic leverage points that could accelerate growth and development of the industry. The response was clear: expanded lodging (and dining) options for tourists and visitors seeking a level of accommodation not currently available in the local market. The Partnership was able to secure grant funding to address this opportunity.

- Key outcomes: New hospitality projects.
- Endgame: One project aimed at the right market segment may be sufficient or could unleash follow-on investment that would naturally build additional momentum.

Med Ed Project

The need for additional health care professionals, particularly in rural communities, is acute and growing. The Partnership has undertaken several years of research to evaluate the feasibility of establishing a new regional higher education facility to address those needs.

- Key outcome: A new college that would be a highly stable economic driver of local employment.
- Endgame: If and when the project gathers sufficient political momentum, The Partnership will face the choice of either establishing a stand-alone effort for the project or focusing the majority of its resources and attention on bringing the initiative to fruition.

Entrepreneurship

A critical gap in the local enterprise infrastructure has been the availability of early-stage capital. Because The Partnership had both the connections among local individuals who could form the core of a regional investor group and the talent to develop a response, The Partnership has played a vital convening role in the development of the Roseburg Area Angel Investor Network. This effort expanded to include the training and support of local entrepreneurs in strategies and tactics to seek early stage investment.

- Key outcomes: Local companies launched, jobs created.
- Endgame: Transition effort to Umpqua Business Center and others whose core functions are support of early-stage and start-up businesses. Continue to play an advisory and facilitative role while reducing and limiting staff time devoted to the effort.

Opportunity Development

The Partnership will continue to consider additional targeted development opportunities for future years, especially since they align with the core strategic pillars.

- Accelerated/increased development of outdoor recreation opportunities and marketing
- Direct recruitment of additional agriculture-related investment (e.g., wine grapes, blueberries, row crops, etc.)
- Alumni-based talent recruitment network
- Increased federal investment in VA and other local governmental agencies
- Recruitment/support of home-based lifestyle entrepreneurs and teleworkers