

Douglas County Economic Development Roadmap



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I. Purpose of Plan

Purpose: This plan, the Douglas County Economic Development Roadmap, is intended to update *The Partnership's* current work plan, completed in 2000, focused on primary industry retention, expansion and attraction. A lot has changed in Douglas County over the last decade, the global economy, technologies, and new emerging industry sectors. Douglas County has been especially hit hard by the recession and decline in the construction business. With limited resources, The Partnership is seeking a better game plan to focus efforts for the greatest return on investment of time and resources.

Goal: This plan has been developed to enhance the opportunities for Douglas County to **increase family wage jobs** [household income ranges from \$42,500 to \$50,667¹] through the *growth of primary industries that fit in Douglas County* – industry that import dollars and export product, creating economic multiplier effect throughout the region in the form of investment, jobs, payroll and local purchasing power.

Outcome: The plan is to provide an analysis of Douglas County’s competitiveness, match assets and limitations to “best fit” industry targets, and craft specific recommendations to attract and grow industries that provide family-wage jobs.

Project Process	
Step 1. Where are we now?	
Deliverable:	Assess Douglas County’s state of readiness for attracting, retaining and expanding primary industry sectors and complete a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis.
Step 2. Who do we target?	
Deliverable:	Identify industry sectors that Douglas County can successfully present a compelling business case.
Step 3. How will we spark Douglas County’s economy?	
Deliverable:	Create an implementation plan focused on primary industry.

¹ Definition of family wage for Douglas County depends on source of data: HUD Median Family Income for Douglas County (2009) is \$50,667; American Community Survey Median Family Income for Douglas County is \$49,600; \$42,497 is the household income required to buy a median-priced home in Douglas County of \$210,100 (Source American Community Survey)

Creating a Competitive Community

To be successful in economic development, it is necessary to have strategic focus, especially since The Partnership and other business resource providers in Douglas County do not have unlimited resources (funding, staffing). And regardless if resources were more abundant, no silver bullet exists in economic development. Countless solid, steady, and often small steps are needed to impact the local economy. This requires everyone working together on factors that enhance a community's competitiveness for winning investment and jobs.

Figure 1: Competitive Community Factors



This plan focuses only on the primary industry sectors. Other initiatives may need to be implemented to enhance and improve local conditions.

Even with everything and everyone working together, that does not guarantee success. External market forces are always at play and must be in place to provide opportunities for Douglas County to be considered in a site search process. During these economic times new locations and even expansions are limited, companies are being forced due to market conditions to look for cost-cutting measures such as consolidations. However, there are new emerging trends, regulations and market opportunities for new products and businesses in the growing fields of sustainability, green products and new technology around sustainability. As this trend is adopted it will bring new opportunities, the key is to position for the opportunity.

II. Current Douglas County Market Conditions

It is important to understand the current market conditions and “where we are now” in order to develop a realistic and implementable plan.

This section of the plan highlights the findings from Step 1, the Assessment Phase which involved:

- Consultant team tour of each community in Douglas County, tour of industrial sites and meetings with local stakeholders in each community.
- In-depth business climate interviews and meetings with local employers, economic development service providers, community leadership and other stakeholders.

Full reports of the Regional Assessment and Business Climate Interviews can be found in the Appendix, *Background Reports Supporting the Plan*.

This section includes overviews of:

- Strengths, Weaknesses, Opportunities and Threats Matrix – perceived or real opinions of Douglas County by local businesses and stakeholders. This information provides the foundation to identify industry-business opportunities and constrains or “deal killers” to retaining, expanding and attracting business to Douglas County.
- Asset Matrix Test – is a method to rank the assets and strengths as to their competitive advantage for business locations.
- Industry Concentration (or often referred to as “bubble charts”) helps to understand the current industry and employment foundation, size of an industry cluster and the potential projected growth of industry clusters into the future, such as, health care, which is a growing industry in any economy due to the aging of the population and health care reform. This analysis is focused on primary industry, such as manufacturing; however, stakeholders should review this data to identify other growing sectors which would benefit from a focused growth strategy.
- Business Support Organizations – matrix to help understand the depth and breadth of the business services and organizations working with businesses and/or implementing programs to stimulate the economy to help identify where linkages can be made to strengthen initiatives and leverage limited resources.

A. SWOT Matrix

The following matrix highlights the Strengths, Weaknesses, Opportunities and Threats in Douglas County as identified by local businesses and stakeholders, and findings from consultant tour and research.

Strengths, Weaknesses, Opportunities, Threats (SWOT) Matrix

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Abundance of large sites, ready for development; Certified sites ▪ Access to electricity, especially for high power users at competitive costs ▪ I-5 runs through Douglas County ▪ Proximity to Port of Coos Bay ▪ Rail-served sites, rail switch yard ▪ Fiber optic broadband ▪ Availability of water, especially at the former International Paper site ▪ Speed and customer service through the entitlement process ▪ Four Enterprise Zones ▪ Aggressive incentives through Douglas County Industrial Development Board (with available resources) ▪ Economic development partners are aligned and work well together ▪ Competitive wage rates ▪ Dependable, loyal and eager work ethic ▪ Robust workforce services for recruitment, screening and training ▪ City of Roseburg developing sustainability policy ▪ Housing prices significantly lower than the national average ▪ Reasonable cost of living ▪ Immediate access to range of outdoor recreation venues 	<ul style="list-style-type: none"> ▪ Lack of available, quality buildings ▪ Distance to commercial airport ▪ Distance to intermodal ▪ Natural gas is fully subscribed with pipeline constraints ▪ No evidence of formal sustainability program at county and community level ▪ Limited private sector engagement and investment in The Partnership ▪ Perceived workforce ready challenge
Opportunities	Threats
<ul style="list-style-type: none"> ▪ The Partnership’s successful Business Retention Program ▪ Relatively lower taxes than California, Arizona and Idaho ▪ Relatively lower cost of doing business to California but close enough to serve California markets within one-day trucking ▪ Active local timber industry association ▪ “Timber Belt” ▪ Local businesses implement active sustainability programs; several businesses are leaders in their industry for green product development 	<ul style="list-style-type: none"> ▪ High cost for LTL trucking services ▪ Perception of high taxes from media on passage of State Initiatives 66 & 67 ▪ Condition of Coos Bay Rail Line – need for upgrades ▪ Difficult to recruit talent into Douglas County because lack of cultural activities and shopping ▪ “Brain Drain” of younger workforce ▪ Competitive economic development organizations well-funded with large marketing and business development staff ▪ No formal connection between local trade associations and The Partnership ▪ Dwindling funds for business recruitment by state

B. Asset Matrix Test

From the SWOT process, the strengths and opportunities are put through a test referred to as the **Asset Matrix Test**. The Asset Matrix Test is a simple assessment tool that screens for differentiation that can set Douglas County apart from the competition. Competitive assets must be 1) valuable, 2) rare, and 3) hard to imitate.

The assets that are identified as *valuable, rare and hard to imitate* provide the highest competitive advantage to a community for creating market opportunity. Strategies should first be built around these assets and then around other strengths and opportunities which might need more work to become a competitive advantage.

Asset Matrix Test – Douglas County’s Top Assets		
Asset Value	Douglas County’s Assets	Is it a Competitive Advantage?
Valuable	<ul style="list-style-type: none"> ▪ Business Retention Program ▪ Low taxes ▪ Low cost of doing business ▪ Dependable, loyal, eager work ethic ▪ Competitive wage rates ▪ Workforce services and training ▪ Rail-served sites ▪ Fiber optic broadband ▪ City of Roseburg developing sustainability policy 	Strength – but not a competitive advantage
Valuable & Rare	<ul style="list-style-type: none"> ▪ Location on I-5 ▪ Direct ocean access (some sites) ▪ Proximity to ocean port (Port of Coos Bay) ▪ Energy capacity at (some) sites ▪ Water availability ▪ Rail switch yard ▪ Enterprise Zones ▪ Outdoor recreation and natural resource amenities ▪ Local businesses’ sustainability programs 	Strength and a competitive advantage
Valuable, Rare and Hard to Imitate	<ul style="list-style-type: none"> ▪ Certified Sites ▪ Speed & customer service approach through entitlement process ▪ Timber Belt ▪ Local businesses as leaders in their industries for green product development 	Competitive advantage with leadership, planning and implementation

Although there are considerable strengths, there are some weaknesses that were identified by existing businesses as well as through the assessment that need to be addressed to make Douglas County competitive with other communities, particularly along I-5:

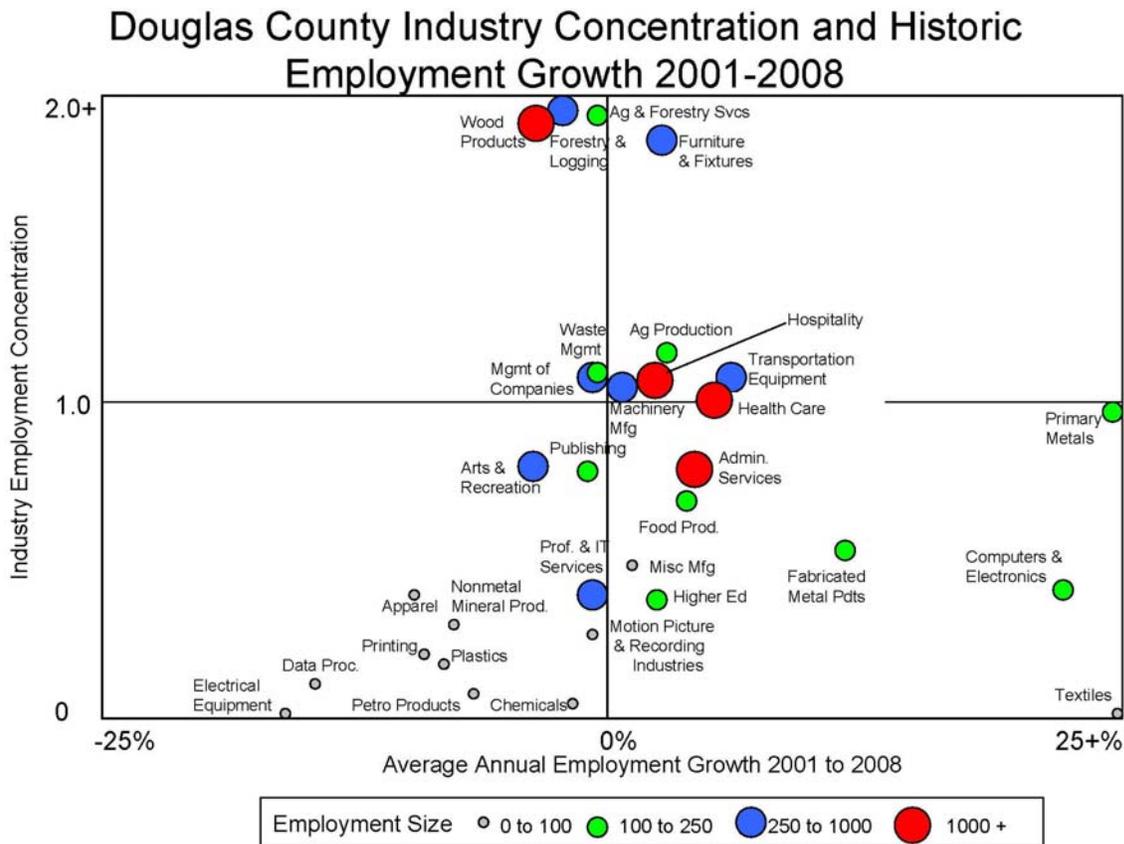
- Lack of available, quality buildings – 50-70% of business seeking new locations or expanding will be looking for existing quality buildings;
- Constraints on natural gas service – will eliminate any major gas users;
- Workforce – ranked as strength for available labor but a number of potential issues were identified – have to screen many candidates to find qualified worker, drugs, lack of technical people, spousal opportunities and general lack of attendance.

C. Industry Concentration

A snap shot of Douglas County’s employment growth by industry sector offers a context for Douglas County’s growth patterns. The bubble charts presented below were sourced from IMPLAN ES202 data for Douglas County, Bureau of Labor Statistics National Employment and Output Projections, 2009.

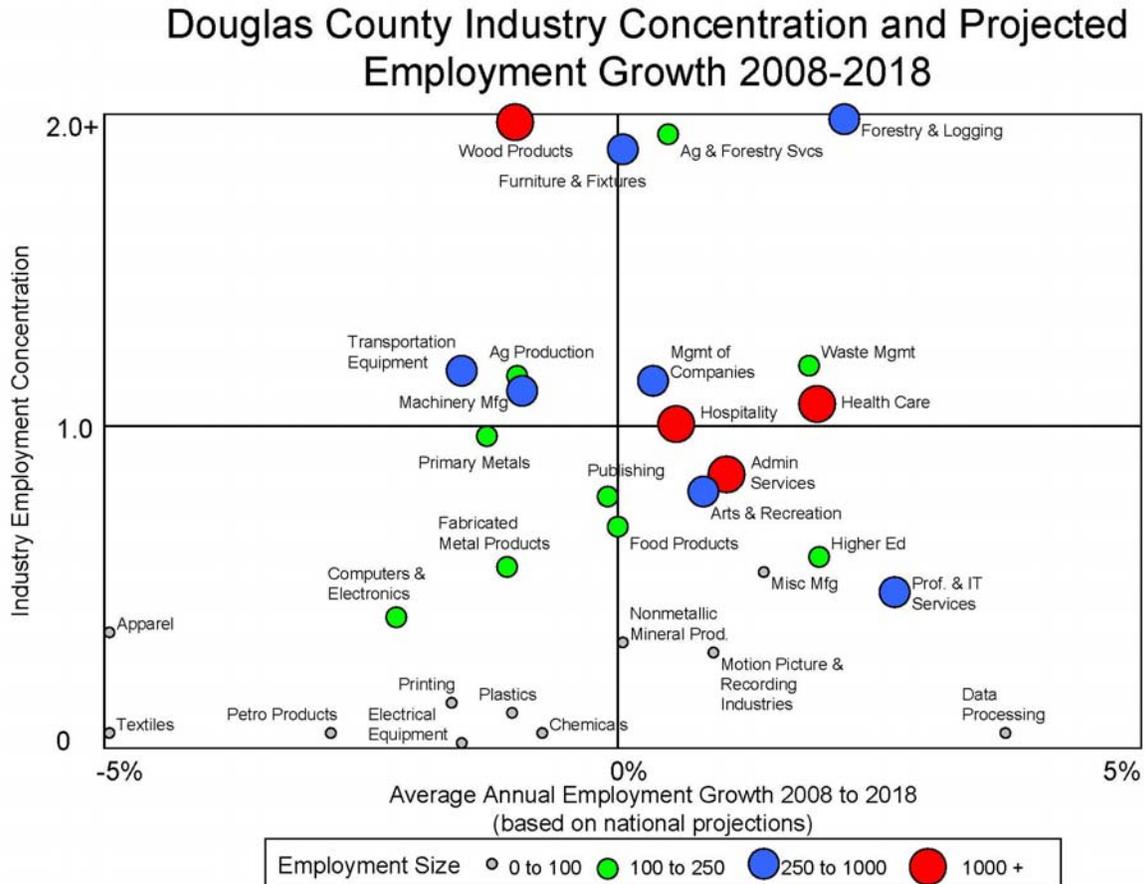
Douglas County’s employment continues to be very dependant on the strength of the timber and related products industry sectors. However, growth has occurred within the last ten years in the service industries of health care, hospitality and primary industries of agricultural production, transportation equipment, machinery manufacturing, primary metals, fabricated metals, computers and electronics, and food processing.

Figure 2 –Douglas County Industry Concentrations and Historic Employment Growth 2001-2008



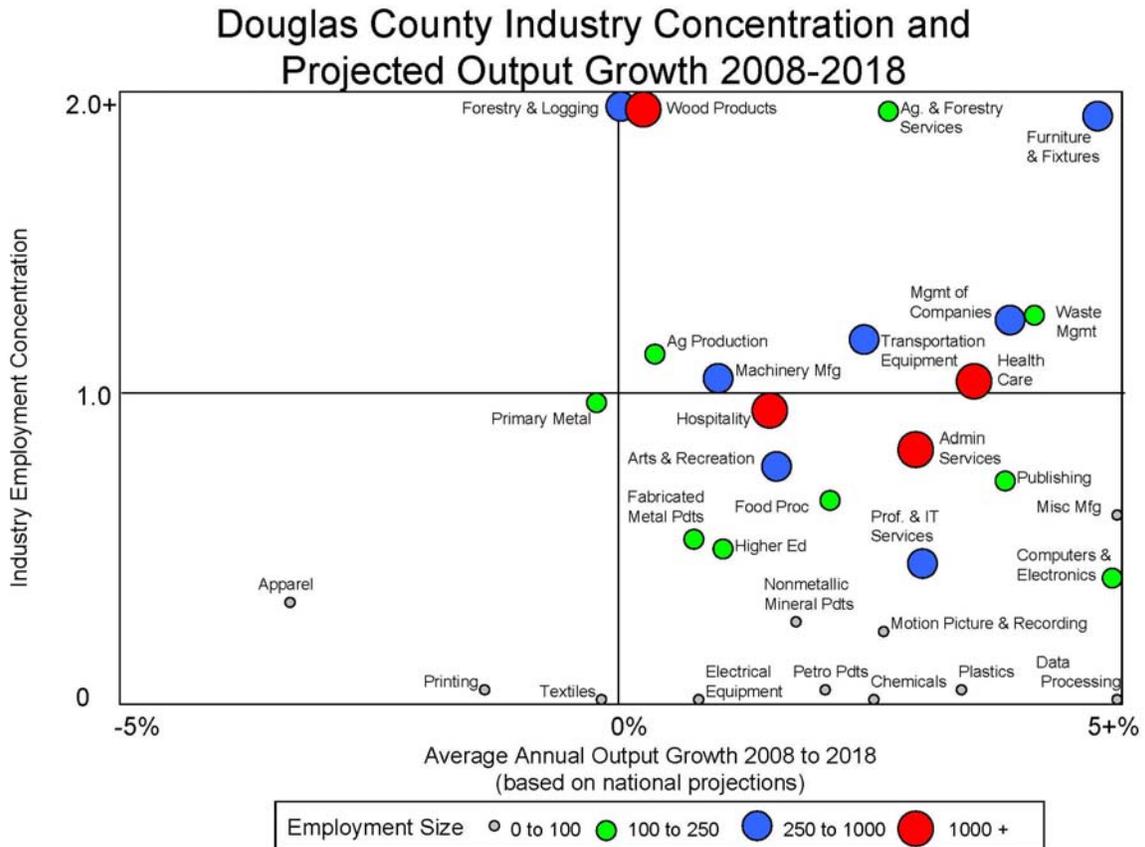
Major employment growth through 2018 is projected to occur in health care, hospitality and administrative services.

Figure 3 –Douglas County Industry Concentrations and Projected Employment Growth 2008



To identify where innovation and productivity increases are anticipated for Douglas County industries, a presentation of projected output growth is shown below. The biggest anticipated gains in output will be by furniture and fixtures, computers and electronics, and waste management industry sectors.

Figure 4 –Douglas County Industry Concentrations and Projected Output Growth 2008-2018



D. Business Support Organizations

There are many groups involved in economic development efforts in Douglas County – all doing good things in their area of focus:

Business Support Organizations in Douglas County	Business Services												
	Primary Industry Attraction	Primary Industry Retention & Expansion	Site Development	Workforce Recruitment & Screening Services	Workforce Training	Financing	Primary Industry Incentives	Small Business Counseling	Entrepreneur Services	Tourism	Downtown & Retail Development	Community Development	Low Income Housing
The Partnership	X	X	X										
Douglas County Industrial Board			X			X	X						
CCD Business Development Corporation						X	X	X	X			X	
Umpqua Community College Business & Workforce Development					X								
The UCC Small Business Development Center								X	X				
Southwestern Oregon Community College					X			X	X				
Oregon Employment Department				X									
Umpqua Training & Employment				X	X								
Umpqua Community Development Corporation						X		X	X				X
Lower Umpqua River Region Economic Development Forum											X	X	
Downtown Roseburg Association											X		
Roseburg Area Chamber of Commerce											X		
Roseburg Visitor & Convention Bureau									X				
Myrtle Creek Main Street Association											X		
Oakland Economic Development									X	X			
Cow Creek Band of Umpqua Tribe of Indians									X	X		X	
Umpqua Valley Wineries									X				
Business Oregon	X	X	X			X	X						

The Partnership's programs and efforts focus on three key actions which result in growth in sustainable living wage jobs, increased wealth in the community to spend locally and increased tax base from capital investment:

The Partnership Core Services

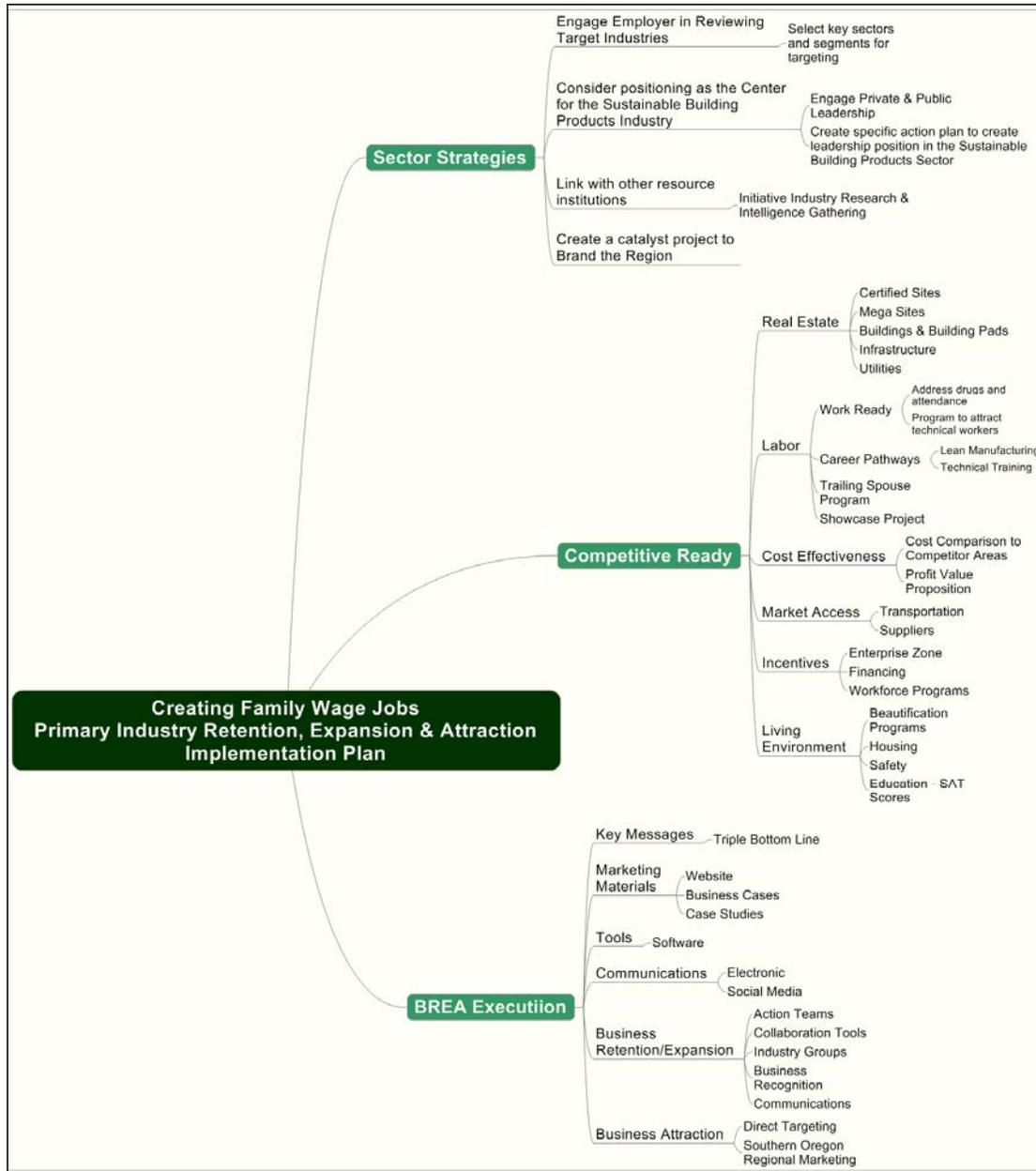
- (1) Business retention, expansion and attraction;
- (2) Removing constraints and barriers for primary businesses to grow and locate, and
- (3) Linking manufacturers to key resources to increase their bottom line.

During this economic recession and decline of jobs in major industry sectors, it is extremely important to continue this focus, working directly with both existing and new primary industries on stabilizing companies and identifying new opportunities for growth.

III. Primary Industry Strategic Initiatives

This plan has been developed to enhance the opportunities for Douglas County to **increase family wage jobs** [household income ranges from \$42,500 to \$50,667²] through the **growth of primary industries that fit in Douglas County** - those industries that bring value to the county in the form of investment, jobs, payroll and local purchasing that would most benefit from the region's assets.

The Partnership should focus on 1) key industry sectors; 2) removing barriers and constraints and improving competitiveness; and 3) implementing the strategy - targeted marketing and call program.



² Data source: HUD Median Family Income for Douglas County (2009) is \$50,667; American Community Survey Median Family Income for Douglas County is \$49,600; \$42,497 is the household income required to buy a median-priced home in Douglas County of \$210,100 (Source American Community Survey)

The strategic initiatives presented in this plan are scaled to realistic implementation based on The Partnership's organizational capacity and budget. A majority of the plan can be implemented now while some elements are included for longer-term development.

The plan outlines five key areas for updating The Partnership's core services:

1. Implement Industry Sector Strategy Process
2. Create Recession Action Teams - *Urgent Stimulus Strategy*
3. Expand Business Retention and Expansion Outreach and Promotion
4. Enhance Douglas County's Competitiveness
5. Build Lean and Efficient Partnership Operations by Improving Technology & Tools

Following are recommended specific actions to enhancing the implementation of the Roadmap.

A. Implement Industry Sector Strategy Process

For local public and quasi-public systems, separate missions, funding streams, and structures make it difficult to focus on the complex, larger challenges that confront a regional economy. Without a mechanism for collaboration across various stakeholders and systems, the opportunity is lost to coordinate information and leverage resources in ways that address regional workforce and economic challenges. Sector Strategy approach has emerged as a response to these challenges. The Oregon Community College system uses sector strategy in their green initiative planning.

What are Sector Strategies? Sector strategies support and focus initiatives on key industries, which are defined as *regional, industry-specific approaches to economic development and workforce needs, implemented by an employer-driven partnership of relevant systems and stakeholders*. They are part of a growing movement by states and local areas to adopt industry-focused strategies that are rooted in the economic, human capital and community strengths of a region. They rely on strong partnerships of employers and stakeholders to make informed decisions about economic and workforce needs and solutions that will keep regional industry strong and provide quality jobs and advancement opportunities for workers.

Key characteristics of strong sectors are:

- Concentrations of related export-oriented and population-driven sectors with career potential
- Sources of long-term structural growth (vs. short-term cyclical fluctuations)
- Strong and/or improvement on multiple growth criteria

By coordinating workforce, education, economic development and other systems, resources are leveraged toward common goals at the local level. In this way, sector strategies are more responsive to industry demand than traditional services because they are problem-solution oriented, not program oriented; address needs interdependently, not independently; and work with employers in an industry collectively, not as individual firms.

A key sector strategy implementation action, for The Partnership and Douglas County as a whole, will be engaging industry and other “industry providers” in conversations around key industry sectors (targets) regarding their needs to remain competitive (and stabilize) and opportunities to grow new job creating business entities in the sector.

Target Sector Industries

This section of the plan identifies targets in key primary industry sectors that fit Douglas County's assets and are not hindered by some existing liabilities for business location.

A three-step screening process was used to identify potential target industry sectors for business expansion and attraction, screening existing industry clusters, high utility users and a reverse target screen of industrial site to potential industry.

Proposed Target Sector Industries		
Screen	Industry Sector	Fit
Existing Wood Products Cluster	<p>Green Building Products</p> <p>Materials & Appliances:</p> <ul style="list-style-type: none"> • Drywall, dry wall replacement • Windows, Doors • Green Cement • LED Lighting, low-power lighting, residential electric light fixtures • Nanotech-based Insulation • HVAC Components • Solar Hot Water Heaters • Low-emitting stucco • Gas appliances, tankless water heaters • Insulation, flooring, framing • Pre-fab homes • Monitoring systems • Certified sustainable lumber • Recycled materials to product • Air purification equipment • Environmental control mfg <p>Architects/Engineers/Consultants</p> <ul style="list-style-type: none"> • Engineering and design • Architects • Design Consultants • Testing, Inspections, Training • Environmental Consulting 	<p>Green Building Products are being driven by the Green, Sustainability Movement for both new construction and retrofit market.</p> <p>Growing environment designs lead by the US Green Building Council (USGBC). Mandatory requirements are being implemented at different levels in different states.</p> <p>Goal is energy efficiency and greenhouse gas reduction.</p> <p>New niche innovative products are being developed for the market.</p>
High Electricity-use Industries	<ul style="list-style-type: none"> • Plastics pipe and pipe fitting manufacturing • Plastic bottle manufacturing • Reconstituted wood products 	<p>All plastic manufacturers - consumer packaging is a great fit due to the market access to large consumer markets on West Coast; plastic pipes</p>

Proposed Target Sector Industries		
Screen	Industry Sector	Fit
	manufacturing	<p>and other construction materials will compliment the sustainable building products target cluster.</p> <p>Reconstituted wood products manufacturing – most wood products manufacturing is high energy user and will compliment the sustainable building products target cluster.</p>
	<p>These high-utility users were screened but were eliminated as potential targets until certain constrains are mitigated:</p> <ul style="list-style-type: none"> • Paperboard mills, and paper and newsprint mills • Glass container manufacturing • Flat glass manufacturing 	<p>Paperboard and paper/newsprint mills were eliminated due to market constriction. Plant closings are occurring. China is increasing competitiveness in low cost paper production.</p> <p>Glass container manufacturing is a growing industry, especially for wine and beer bottles to serve growing industries on the West Coast. There is demand and likely, due to environmental requirements for such a plant, it is not likely a plant will locate in California. However, Douglas County’s natural gas limitations become a deal killer. Electric powered plants are common in Europe but the only glass plant powered by electricity in the United States recently closed.</p> <p>Flat glass manufacturing, more specifically rolled glass, was considered due to the growing solar market on the West Coast and in the Portland area. Based on projected demand, there is huge opportunity for growth in the rolled glass manufacturing despite new plants that have recently come on line or product adjustments to existing flat glass plants. This target was eliminated due to the constraints for natural gas.</p>
Site Specific	<ul style="list-style-type: none"> • Sanitary paper product manufacturing 	<p>Sanitary paper product manufacturing – although there is a large facility on the Columbia River, this market segment will only grow with consumer demand.</p> <p>Douglas County’s site capabilities and other assets can build a strong business case for this industry.</p>

Action: Focus on Sustainable Building Products as the Key Industry Sector

Given Douglas County's location in the Oregon "timber belt" and the existing predominance of the building and wood products industry, **recommend creating a brand and establishing Douglas County as the Center for Sustainable Building Products** in Oregon.

The area already has significant attributes to become a center of excellence for the building products industry particularly in the "green" sector, see Sustainable Building Products graphic.



- Engage employers to understand the specific opportunities in this sector and how to strategically achieve becoming a center of excellence for the industry. As noted, the key to a sector strategy is the engagement and leadership of the industry sector to create an *industry-driven partnership of relevant systems and stakeholders*.
- Link to efforts at the research institutions, technology schools, association and other activities in Eugene and Portland.
- Conceptualize the development of a Center for Sustainable Building Products, along I-5, which could be multi-purpose for the industry – showcase products, innovations and commercialization, event space for meetings, training center for building practices.
- Utilize the "timber belt" descriptor of the area to develop and brand the region.
- Engage education and workforce development in the planning process, particularly as it relates to training and career pathways.

Action: Continue Industry Intelligence Research around Key Sectors

Become familiar with industry's language (acronyms, terms, etc), understand industry trends, challenges and market opportunities. Each sector has different drivers for site location and expansion. Research will help to understand which factors are priorities for key industries for developing responses to the industry.

1. **Industry Listening Sessions:** Invite local employers to The Partnership advisory meetings to speak about issues and opportunities affecting their industry. Better understanding of issues will help The Partnership and economic development partners to provide better services and programs.

Note: If the Sector Strategy process is implemented for the Sustainable Building Products industry, it should be the priority - engaging those employers in-depth strategy planning for the sector.

2. **Industry Research and Tracking:** Research the key target industries to understand industry drivers, issues and opportunities:
 - ♦ Track and monitor key industry websites for news and reports,

- ◆ Customize Google for target industry research (Finance, news alerts and RSS feeds on companies and industry topics, customize Google news page)
- ◆ Join industry-related LinkedIn groups
- ◆ Join industry associations relevant to target industries

Action: Participate in Local Industry Associations

Peer to peer networking among industry representatives is very important to the health of any industry. The local timber association is already meeting regularly. The Partnership should participate in a support function and attend meetings to further understand industry issues and concerns identified by local industry leaders and/or issues and opportunities on a broader state or national level.

1. **Local timber association:** See if The Partnership can attend Douglas County Timber Operators meetings to learn more about the industry, local needs and to find opportunities to support the industry as it relates to establishing Douglas County as a center for sustainable building products.
2. **Local Manufacturers' Networking Group:** If interest from local manufacturers, organize local manufacturers group run by local manufacturers with staff support from The Partnership. This would be a forum for local manufacturers to share common issues and needs and an opportunity for The Partnership to work with economic development partners to develop solutions to any needs. Organize relevant speakers for group based on interest of group. Most successful groups of this sort are limited to manufacturers, distribution, etc. to maintain the peer-to-peer venue.

The purpose is to have peer-to-peer networking among the manufacturers, meetings should be flexible and limited to no more than 3 per year, unless the manufacturers desire to meet more often.

Action: Initiate Target Industry Marketing

With a better understanding of industry needs and issues, market more than the features of Douglas County and present the benefits of Douglas County's assets demonstrating the value proposition of locating in Douglas County. Additional marketing recommendations are provided in section *E. Build Lean & Efficient Partnership Operations by Improving Technology & Tools*.

1. **Sustainable Building Products Conference:** Working with the Douglas County Timber Operators and other partners, become host/sponsor of conference in Portland.
2. **Business Introductions:** Connect local wood products companies with green building design firms in Portland.
3. **Leverage Marketing:** In addition to The Partnership's direct marketing and call program, continue to work through the Southern Oregon Marketing Team (regional marketing) to leverage and extend the Partnership's external marketing efforts:
 - **Tradeshows:** Advise regional team which tradeshows to target based on Douglas County's key industry targets.
 - **Outbound Prospecting and Appointments:** Recommend the regional team hire ROI (or other prospecting firm) to pursue appointments for regional members. The Partnership should advise on industries to pursue. Build compelling business case to use on prospecting and marketing appointments (see Marketing Material recommendations).

B. Create Recession Action Teams - Urgent Stimulus Strategy

During this economy any business is apt to 1) downsize or 2) close. Immediate action is required when companies close, such as Alcan's recent announcement - it is devastating to a community. Although often difficult to turn a closed building quickly to a new operation - every opportunity should be taken to do so.

Douglas County is fortunate to have an excellent "business friendly" reputation as well as recognition for its customer service in fast tracking business permits.

- Create a standing "team" to immediately begin work with a company that announces closure (or downsizing). As soon as possible (or before if closure is known) have team meeting with company to not only offer services for the displaced workers but in marketing the building for reuse. Obtain permission and agreement from company to market the building to target lists. Obtain as much "due diligence" information as possible on the building - financial, physical, terms (sale/lease) etc. Ascertain from company any potential users they are aware of and any that they may not lease or sell the building too.
- Team should discuss potential incentives that would be available (or that could be marketed) to attract new user, such as, building write-down, renovation loan, infrastructure improvements, customized training and/or on-the-job training contracts.
- Team should review highest and best use for the building, reuse opportunities and identify industry best fitted for the building.
- Create an opportunity sheet that documents the availability (and terms) of the building, characteristics of the facility, location, current use, number and skill of displaced workers, and any incentives.
- Market as turn-key opportunity
 - Create an introduction letter that summarizes the turn-key opportunity and send to similar companies as the closed company, site selectors and national real estates brokers;
 - Post turn-key opportunity package on The Partnership website and Loop Net;
 - Call targets to follow up on mailing;
 - Depending on interest, package information on facility, available workforce, and other assets to support the business case for the interested party to visit the facility; and
 - Add workforce information to building listing on Oregon Prospector website; link to more in depth turn key opportunity data on The Partnership website

C. Expand Business Retention and Expansion Outreach and Promotion

Job growth from existing employers typically accounts for 70 to 80% of all job growth. During these economic times much of businesses issues are “market-based” which can lead to downsizing or consolidating if the local company is part of larger corporation. Healthy stable companies are also targeted by other areas who could offer them lower cost operations or incentives to move. It is more important during these times to stay connected with local employers and to demonstrate to existing employers they are appreciated and teams are available to assist with issues as well as opportunities.

- **Business Outreach Meetings:** The Partnership does a good job with outreach meetings locally. These meetings along with corresponding follow-up assistance should continue and expand to include meetings to the headquarters of companies located outside of Douglas County. Work with local plant manager to set up meetings at headquarters.
- **Industry Groups:** Encourage industry group networking opportunities, such as industry/manufacturing meetings or event hosted by The Partnership.
- **Local Business Recognition:** At least annually, recognize local businesses as a means to demonstrate they are appreciated and recognized for their accomplishments:
 - Recognize for job growth, sales growth, new product launch, new employee program, etc.; find unique ways of recognizing local companies
 - Issue news release on companies recognized
 - Develop case study on each company recognized
- **Increase Communications:** Using an e-newsletter tool, develop a brief e-newsletter for monthly distribution to promote business resources available to local employers. Link to The Partnership’s website and partner websites for more information.

D. Enhance Douglas County's Competitiveness

Site selection is about elimination. Site selectors search for things that will eliminate a community from a site search to get to their "short list". To be competitive, Douglas County will need to mitigate weaknesses and constraints which they can control; otherwise they could face being eliminated from a site search even if it is one of the target industries that are a good fit. The key is to be prepared - anticipate the needs of target industries and expanding local employers by removing constraints and barriers.

An action item is to remove any constraints or barriers that are locally controlled, enhance and continue to improve competitiveness where possible and document key location factors that may be perceived to be a weakness.

Who is responsible for maintaining and improving competitiveness - everyone. A Collaborate to Compete approach should be used to address competitiveness weaknesses, all organizations and groups working together to address issues. Prioritize the issues and select lead organizations to address "competitive-ready issue". The Partnership should take the lead on site location factors, infrastructure and incentives.

Key areas of concern identified in the assessment were lack of available quality buildings, natural gas and workforce challenges, and a key area of competitive advantage is the Site Certification.

- **Site Certification:** The area has some very good sites, well located, infrastructure served, and many which have been certified through *Business Oregon* Certified Industrial Lands program. Continue efforts to certify sites through *Business Oregon* and market the certification.
- **Spec Building:** Create a portfolio of spec industrial buildings (if not built, at least on paper) for County-owned site that has excellent I-5 visibility to increase marketing exposure.
 - There is a unique opportunity to partner in a spec development with R. Noah & Company, who has an available steel building frame that could be constructed on a site. Work with partners to develop creative financing solution, use as green construction/demonstration project, or
 - Possibly use the opportunity to create the *Center of Building Product Excellence* to kick-start the sector strategy initiative.
 - Alternatively, if financing solution not possible, work to have everything primed for the building to be built on a very short timeline (shell w/ basic tenant improvements) and pre-permitted.
- **Workforce:** Hold meetings with education and workforce to begin to address the issues identified by local employers as weaknesses in the labor force, develop action plans to address the issues, get feedback from employers:
 - Screening for qualified candidates - narrow the pool to shorten the number of candidates they current interview to find qualified candidates.
 - Identify the "technical" worker needs
 - Drug use and drug testing
 - Spousal employment opportunities

Create and/or market to business and include in marketing packets (if already available) Certified Ready Workforce and graduates of career pathways (if align to industry sectors).

- **Value-added Labor Data:** Competitive communities provide more than basic data about the local labor market
 - **Labor shed maps:** This data will put Douglas County ahead of the competition since this piece of information is highly-valued by site selectors and businesses in site search mode. It visually depicts how far an employee will commute to a similar type job. Working workforce development and local HR managers, gather zip code data for employees working at existing businesses. Segment by occupation and wage levels. Map labor sheds using GIS system at the county or city (alternative is Google Maps) by industry occupational clusters/wage levels. Post to website and use laborshed maps for relevant occupations in proposals.
 - **Skills Sets:** Dig deeper into workforce skill sets to demonstrate a true differentiation and competitive advantage for Douglas County, i.e., technical training program graduates and skill set learned, certifications. Survey employers to document their assessment of workforce quality and special skills, i.e., heavy equipment handling. Promote results on website. Document availability of workers by occupation.

Local community members voiced concern regarding the community “livability” and attractiveness. This is an important factor that through collaboration of entities can be address to improve a community’s appears, attractiveness and the newest buzz word “cool”.

- **Living Environment:** The local living environment is a key competitiveness factor particularly when recruiting technical or management executives to the community. It often goes beyond attractiveness. Important for business is to know the community is solid, stable, safe and has an environment for quality growth for their employees and children.

Often businesses perceive the quality of the community based on its appearance – does it look clean, is landscaping kept up, street swept, buildings painted or in disarray. Not only is the landscape important but also the quality of housing, schools, transportation, health services, etc. These are community-wide concerns. Each community in Douglas County should do a self-assessment of their living environment as if they were an outsider looking to start a business – what would be your major concerns. These efforts are often led by the Chamber of Commerce and concerned community residents with the city, school district and downtown associations.

An advantage to creating the “cool” factor is the emerging wine industry which can also help stimulate locations of other small, niche businesses that contribute to this ambience. A good example of community transformation is Paso Robles, California,

E. Build Lean & Efficient Partnership Operations by Improving Technology & Tools

The Partnership is a small, efficient organization. There is only one full time professional staff and one part time support. The Partnership has done incredible work given the size of the organization and the limited budget to accomplish its goals. As noted earlier, there are numerous organizations providing business services and collaborating on economic development activities.

The Partnership should remain focused on its core services of Business Retention, Expansion and Attraction; removing constraints and increasing competitiveness and linking manufacturers with key resources. The Partnership should be clear in communicating its goals and services with local businesses, partners and investors:

1. The Partnership should be the “one stop” center for primary industry, existing and new; connecting industry with the right resources to meet their needs;
2. The Partnership, Board and key primary employers should be the lead entity to guide and implement a county-wide *primary* industry strategy collaborating with partners; removing any barriers to primary industry expansion in the County;
3. The Partnership will implement such strategy as approved by the Board and investors to attract, retain and expanding primary industry in Douglas County which will result in family wage jobs.

To be more effective, staff must operate more efficiently to meet the specific needs of clients while rising above the competition in new and aggressive ways. Technology and marketing tools can assist in improving communications, marketing and prospecting while saving staff time.

Action: Tools & Marketing Materials

- **Key Messages:** Recommending formalizing key messages for the business attraction. Use a tag line, such as *Triple Bottom Line Location*. Triple Bottom Line or 3BL is the newest buzz word representing green business – People, Planet, Profit. This buzz word is catching on with business as sustainability grows as a corporate responsibility.
In addition to a tagline, formalize Key Messages – the 3-5 key advantages, and formalize “proof points” to the key message – examples that *prove* the key message is accurate. If the Triple Bottom Line Location tag line is used the key messages and proof point should be structured around People, Planet, Profit. Key message should differentiate Douglas County from competitors, such as:
 - Douglas County is the Timber Belt of Oregon (proof points)
 - Cut 90 days off your planning process with our certified mega and business park sites (proof points)
 - We operate at the Speed of Business (proof points)
 - Our workforce is work-ready (proof points)
- **Website:** The current website is difficult to navigate and time consuming for staff as updates and posting are currently done by an external webmaster. The Partnership needs to develop a new website on a content management system (CMS) which enables staff to make changes at anytime to the website so that content is always current.

- A CMS-based website will also be more economical as on-going updates will not incur additional costs. For smaller communities the EDSuite 2.0 economic development website tool, www.edsuite.com, is a powerful website system designed just for economic development organizations offering a CMS system, community profile, available property database, profile builder tool, news and press release feature, on-line proposal and a powerful back-end administrative system. The system is very cost effective for the smaller organizations.
- A draft Website Map was prepared for The Partnership to review, the site map mainly outlines context that should be posted on the website. If using a web tool such as EDSuite 2.0, staff would only have to “post” test to the website which is similar to creating a word document. In addition to the site map, sample data tables are presented in the appendix, tab 13.
- **Web Online Proposal System:** One of the features of the EDSuite 2.0 system is an online proposal system. This tool is the leading innovation in client proposals because it enables The Partnership to easily create a customized proposal from information stored on the website and then posted to a secure area on the website for the client to download. Built into the system is a track log for proposals developed, sent, and client views.
- **Sales Materials:** A number of pre-completed sales materials in electronic format for in-house, print on-demand should be enhanced or created:
 - **Real Estate Flyers:** The Partnership has prepared and uses one-page summary sheets on key development sites. The graphics are good but the layout and content are not consistent. Utilizing templates, sample provided in the Appendix-tab 11, real estate flyers will look like they were professionally designed. Although PDF versions of these flyers can be posted on the website to supplement real estate listings, they should not be the only real estate information on the website. The EDSuite 2.0 tool has a searchable real estate database listing.
 - **Comparative Operating Cost Data:** A sample of an operational cost data sheet that compares California, Arizona, Washington and Idaho is provided in Appendix, tab 11. This is a good one page, high level description of Douglas County’s competitive location and operational costs which is a good talking sheet sales calls and tradeshows, and for proposal as well as the website.
 - **Business Cases:** Business cases help demonstrate Douglas County’s value proposition to a specific industry. As each target industry sector is researched, a business case should be developed that outlines why Douglas County is the best location for xyz industry. Sample business cases are in Appendix, Tab 11. Business case can be used in direct mail marketing campaigns and post on the website – they should always be focused on specific industry sector promoting the unique advantages this location offers, such as, continue technical workforce training, utility costs, transportation and market access.
 - **Case Studies:** Case studies are stories, particularly of “project deals”. Case studies are one of the most read sections of a website. They document how a project came together, why the company chose the location (or expand) and what were the services provide, such as, the financing package, expedited permitting, infrastructure development, selection because of the certified site, labor package, etc. Case studies are proof points for the Business Case and value proposition.
- **Electronic Communications**

- **Software:** Recommend using web-based program such as Constant Contact or Vertical Response for electronic communications to both external and internal audiences. These tools will help The Partnership to develop a professional, consistent communications program and also meet all anti-spam laws.
- **Business Resource Newsletter:** Using the e-newsletter tool, develop a brief, bullet pointed e-newsletter for monthly distribution to promote business resources available to local employers. Link to The Partnership’s website and partner websites for more information. The e-newsletter could be sponsored by a member, but should be kept short and relevant to the audience.
- **Social Media:** Social media tools are no-cost opportunities to connect and enhance communication with and among your target audiences, although they do take time.
 - **LinkedIn** offers the opportunity for individuals to network electronically.
 - Create a Linked Group for Douglas County primary industries.
 - Create an invite list. Personal messages are better than a generic invitation. Send an invite message that is compelling and piques interest, something about what will be placed on the Linked In and how local manufacturers can communicate. Only allow Douglas County primary industries to join the group.
 - Also mail letter to Douglas County primary industries (promote on Business Resource Newsletter) explaining The Partnership’s new LinkedIn Group and invite participation.
 - Encourage B2B communications among group members through your group messages and discussions.
 - Monitor for topics and resources to engage discussion by the local manufacturers.
 - **Twitter:** Establish an account and “message” regularly on The Partnership, local employers and industry-related topics. Messages should not just be meeting announcements about The Partnership as that is not social networking. Be sure to use key words and industry terms to capture attention of non-followers and expand followers. Link Twitter to populate LinkedIn updates.
- **Contact Management System:** The Partnership and other economic development partners are not using a shared contract management system or CRM. **Executive Pulse** is a web-based system that allows multiple organizations to participate on the same system to track existing business outreach and prospective business attraction clients. It is a collaboration tool to better serve and document services provide to the same client base. Appropriate confidentiality can be set for each contact in the system while still sharing data and information as team members work on projects together. Typically, workforce development and economic development see value in using this collaboration tool. The tool would save The Partnership staff time and enhance communications and collaboration among service providers in Douglas County. The cost of the system could be shared among the collaborators. Cost is very effective for this powerful tool. <http://www.executivepulse.com>, see Appendix, tab 10.

Action: Grow Private Sector Membership

Best practices of successful economic development organizations include a balance between public and private sector support, both in concept, operations and financially. Through the interviews with the

local employers, they all seem to value the role and efforts of The Partnership; however, there should be increased number of private sector investors in the organization.

A concerted effort, particularly, as The Partnership moves to sector strategy approach and a higher level of engagement with industry, to increase the private sector membership of The Partnership. The Partnership should be known by all manufacturers and primary industries in Douglas County as the “go to place” to connect to resources and information. The Partnership should also be viewed by public entities as a representative, advocate and spokesperson for primary industries needs – this is best conveyed when the primary industries are dually invested in the organizations efforts with the public sector.

- **Manufacturer Investor Rate:** Establish a special rate specific for manufacturers to join The Partnership (i.e. \$500); if needed, invoice portion of membership quarterly. Provide an investor benefit sheet.
- **Leadership Role:** The Partnership’s Advisory Board should take a leadership role in meeting with local employers to invite investors so that staff efforts for Business Retention and Expansion are not fundraising meetings.

Action: Measuring and Reporting Progress & Outcomes

The results of the plan should be measured and monitored on a regular basis to identify what works and what needs to be adjusted for better results. However, with such a small staff it will be important to be sure the majority of time is allocated to strategic initiatives and not administration. As a result, following are proposed changes for Advisory Board Meetings and communications.

- **Progress Updates:** Prepare and send brief weekly e-newsletters to stakeholders listing progress on plan implementation, results and how partners are involved in The Partnership activities.
- **Advisory Board Meetings:** Reduce to once per quarter or every other month. Preparation for these meetings appears to take time away from productive marketing and outreach efforts. The reduction in meetings will be supplemented with increased communications. Also encourage inviting a speaker or local employer (i.e. Industry Listening Sessions) involved with one of the initiatives to add more value to meetings instead of simply activity reports.
- **Annual Report:** Summarize results into Annual Report and print on-demand as needed for meetings. Post on website. Include case studies on new companies to Douglas County as well as local companies recognized that year.
- **Optional Annual Meeting:** Host event to present annual report of accomplishments. Recognition of local and new employers could also occur during this event.

IV. Related Opportunities beyond The Partnership's Core Services

A. Small Business and Entrepreneurship

Business service organizations are doing a great job of reaching out to local businesses; see Business Services Matrix in Section II, D.

Economic Gardening Program was suggested as a program for consideration. Economic Gardening Programs have been successful in other small and mid-size communities. The research and service delivery of an Economic Gardening program can be a valuable resource for businesses in identifying market niches and opportunities. The Partnership would not have capacity to implement such a program and manage its core program. An Economic Gardening Program could be incorporated and leverage with the new Incubator or SBDC, with Community College and partners participation.

Incubator: The efforts to pursue an incubator in downtown Roseburg, especially using an existing building, are very commendable. The National Business Incubation Association, www.nbia.org, provides extensive information and resources for starting and managing incubators, below is NBIA's principles and best practices guide:

NBIA Principles and Best Practices of Successful Business Incubation
<p>Two principles characterize effective business incubation:</p> <ol style="list-style-type: none">1. The incubator aspires to have a positive impact on its community's economic health by maximizing the success of emerging companies.2. The incubator itself is a dynamic model of a sustainable, efficient business operation. <p>Model business incubation programs are distinguished by a commitment to incorporate industry best practices. Management and boards of incubators should strive to:</p> <ol style="list-style-type: none">1) Commit to the two core principles of business incubation2) Obtain consensus on a mission that defines the incubator's role in the community and develop a strategic plan containing quantifiable objectives to achieve the program mission3) Structure for financial sustainability by developing and implementing a realistic business plan4) Recruit and appropriately compensate management capable of achieving the mission of the incubator and having the ability to help companies grow5) Build an effective board of directors committed to the incubator's mission and to maximizing management's role in developing successful companies6) Prioritize management time to place the greatest emphasis on client assistance, including proactive advising and guidance that results in company success and wealth creation7) Develop an incubator facility, resources, methods and tools that contribute to the effective delivery of business assistance to client firms and that address the developmental needs of each company8) Seek to integrate the incubator program and activities into the fabric of the community and its broader economic development goals and strategies9) Develop stakeholder support, including a resource network, that helps the incubation program's client companies and supports the incubator's mission and operations10) Maintain a management information system and collect statistics and other information necessary for ongoing program evaluation, thus improving a program's effectiveness and allowing it to evolve with the needs of the clients

Included in the Appendix is a background report from the Kauffman Foundation on Entrepreneurship, Tab 14, which could be helpful in developing Incubator Business, Sustainability and key performance indicator (KPI) plan.

B. Tourism & Visitor Attraction

Douglas County offers incredible visitor amenities, from ocean to mountain, history and recreation, and wines in between as well as the traffic for both “stop over” and “destination” visitors. Almost all of the communities toured in Douglas County had some tourism promotions and activities as part of their economic development plan.

Although this was not the focus of this strategy, it appears that tourism efforts by all of these communities could be enhanced with a county-wide tourism and visitor attraction strategy which could better leverage finite resources – budgets and volunteers. This was not investigated but only a “*take away observation*” from meetings. Roseburg leads the tourism effort in its promotion through the Roseburg Tourism and Convention Bureau’s but it was unclear how that effort collaborates with other communities and venue, such as, the City of Oakland’s marketing efforts and billboard presence, and the wine industry’s marketing.

This seems to be an opportune time for the communities in Douglas County to renew collaboration with the Roseburg Tourism and Convention Bureau (who has a good website promoting Land of Umpqua, but nothing on the coast – which understandably is not their region) on a more formal county-wide marketing and promotion campaign to attract visitors to all venues throughout the county. A county-wide collaboration could result in leveraging limited funds and resources with a higher return.

Given tourism can be an economic driver in Douglas County, and if there is not a county-wide tourism plan, **recommend:**

1. Organize a county-wide Visitor Attraction & Promotion Roundtable to share what each community is doing, results and areas of potential collaboration for increasing marketing and promotion resulting in longer visitor stays, and
2. Contact Roger Brooks, Destination Development, <http://destinationdevelopment.com>. Roger is a renowned national expert in visitor attraction, located in Washington. He could be invited to the Roundtable, as a keynote speaker or to do a Community Assessment or Branding Boot Camp. An example of Roger’s Visitor Attraction Strategies is included in Appendix, Tab 14.

C. Wine Industry Initiative

Wine is an emerging industry in Douglas County adding to the region’s amenities and quality of life – adds the “cool” value. Small wine vineyards and boutique wineries are an added venue and attraction for visitors and tourism.

Expanding this niche market fits best with the entrepreneur services and tourism marketing to continue to build the market demand for the local wineries. An additional link is the Food & Natural Resources Career Pathways program with UCC (Culinary Arts Certificate and Viticulture & Enology), is there a way these programs could be used or located to create synergy in attracting visitors and creating a brand for wine and food.

As with any industry sector, association/employer meetings should be held with The Partnership at least twice a year to review specific needs of the industry, such as, suppliers, labor, new opportunities

and strategies to grow the industry niche. At this point in the industry's growth, tourism would be the leading driver to help grow the market and reputation for the wine industry in Douglas County. The wine industry should be a major component of a tourism strategy.

D. Community Tour Observations

Although the focus of the tour and meetings were on the community's industry location competitiveness, following are "take away observations" from those meetings:

Roseburg:

Roseburg is the hub for economic activity and well positioned with infrastructure served, large certified sites. The City is very "customer service oriented". The new incubator facility is proposed for Roseburg, location near the Chamber and the River. The City has a vision and several unique planning projects for revitalizing the community.

As with the reuse of the vacant building for the incubator, the downtown has some excellent large buildings (former grocery store) that could act as anchor to the downtown. Possibly these buildings could be reused as "catalyst" projects to help stimulate locations and traffic to the downtown, such as, a Kitchen Incubator tied to the Culinary Institute/Career Pathways Program, Indoor Farmers Market, tie to the wine industry, etc.

Sutherlin:

Sutherlin has an excellent improved business park which differentiates it from Roseburg with its larger mega-sites. This provides an excellent diverse real estate portfolio for The Partnership to market.

Sutherlin has the opportunity with the park to initiate green standards for future infrastructure, landscaping and build out. The business park shows very well. Recommend a 20,000-25,000 sq ft building footprint be designed for one of the vacant properties, if possible pre-permit. This will provide a "turn-key" building solution for promotion.

Oakland:

Quaint historic city is doing a great job in visitor marketing. The Historic District is truly a gem. Difficulty is getting visitors off I-5. They are holding events such as Wine Festival and Christmas Gala. Also helping the small businesses with internet presence and have been successful in film attraction. Oakland could benefit with a broader marketing approach (limited by dollars) and way signage. Might consider sending Roger Brooks, Destination Development, a letter asking him to stop by on his travels along I-5 to visit the town - send along with pictures. Roger would certainly stop and provide some comments on creative ways to get visitors off I-5.

Drain

Drain, although small, has a lot going for it. Its unique position is that it is only 39 miles from Eugene and 8 miles west of I-5. It is a small community, but self-contained with local utilities, several good companies, local revolving loan program used for economic development, four available sites (small and large) and a building. Community is very business oriented.

Drain is the primary route, Hwy 38, to Coast from Eugene, lots of motor home and trailer traffic but no place for them to park or stop - could be an opportunity for visitor traffic to stop, park, visit and shop while preparing for the trip to the coast.

Reedsport

The Coast, River and Hwy 38 are Reedsport greatest assets. Tourism and visitor attraction is the economic driver for the coast - Salmon Harbor Marina, Winchester Bay, Lighthouse and many activities to draw visitors. Salmon Harbor's Phase III development for indoor facilities will help with year-around tourism market. Green technology will be part of their diversification with the new ocean/wave power technology project. Several plans are underway for beautification and riverfront development.

The old mill site in Gardiner is definitely a unique asset, however, only a few industries would be able to utilize this particular site and location. Best if this site is marketed directly to potential specific users, such as, sanitary paper product manufacturing.

Best strategies are to continue the tourism to create a year-around market. Reedsport would benefit from a county-wide tourism effort.

Myrtle Creek & Glendale

These two small communities are dependent on the development of the industrial park at the 106 Exchange. All barriers to any development on this site should be removed - small but good looking and quality industrial park. Myrtle Creek had an Economic Development action plan and has secured USDA funding assistance for their small businesses. Myrtle Creek works with the Casino to market their golf course, which is a great leverage of resources.

About the Consulting Team

Chabin Concepts' core competency is in realistic, achievable and measurable actions.

We are more than a consulting group – we are a solutions network. We use our network to bring our clients the best practices of renowned experts in urban and rural economic development, site location analysis and hands-on experience in implementing and managing competitive and results-oriented economic development programs.

We value every client and project, respecting the characteristics, heritage and goals of each community, their stakeholders and their economic development team. We commit to integrating our values, integrity and philosophy to create success through:

- ✚ Involvement of the community and all partner organizations.
- ✚ Research that is tailored to specific areas of interest, program implementation or industry focus.
- ✚ A team of experienced and diverse professionals to bring specialized techniques, knowledge, and expertise.
- ✚ Innovative strategies and creative economic development tools.
- ✚ Tactical plans designed for implementation.
- ✚ Effective and successful economic development roadmaps – integrating resources, innovative tools and creative marketing – for communities to accomplish their goals consistent with their values.

The consulting team for Douglas County Economic Development Roadmap included Allison Larsen, Project Manager, Audrey Taylor, President, and Lindy Hoppough, Editorial Director of Chabin Concepts. Strategic partners involved in the project included: Sarah Murley, Partner of Applied Economics and Don Schjeldahl, Vice President of The Austin Company.

