

2023 | BUSINESS PLAN

# Southern Oregon Innovation Hub





# Table of Contents

<b>3</b>	<b>Executive Summary</b>
<b>5</b>	<b>Project Background</b>
<b>9</b>	<b>Needs Assessment</b>
<b>11</b>	<b>Innovation Hub Proposed Model</b>
<b>13</b>	Vision and Goals
<b>14</b>	Innovation Hub Design
<b>14</b>	Services and Initiatives
<b>20</b>	Organizational Structure
<b>23</b>	SWOT
<b>24</b>	Diversity, Equity, & Inclusion
<b>25</b>	<b>Marketing and Engagement Strategy</b>
<b>28</b>	<b>Timeline</b>
<b>31</b>	<b>Financials</b>
<b>34</b>	<b>Metrics for Success</b>
<b>37</b>	<b>Appendix A: Funding Opportunities</b>
<b>41</b>	<b>Appendix B: Reduced Scope Innovation Hubs</b>
<b>44</b>	<b>Appendix C: Acknowledgements</b>
<b>46</b>	<b>Appendix D: Additional Programming Opportunities</b>



---

# Executive Summary



# Executive Summary

---

Southern Oregon is fortunate to have a wealth of entrepreneurial potential bolstered by a strong spirit of innovation and resilience. Yet, despite these valuable assets, the current entrepreneurial ecosystem could improve in providing a cohesive, interconnected support system that can leverage existing resources for the greatest benefit of its innovators and entrepreneurs. The region's Entrepreneurial Support Organizations (ESOs) operate according to their own performance goals and metrics, leading to some cooperation, though often leading to disjointed efforts, missed opportunities for collaboration, and a lack of comprehensive support for innovators and entrepreneurs. This fragmentation creates an overlap of services, competition for limited funding, and inhibits the growth and success of individual businesses, thus stifling the collective economic development of the region.

Through months of planning, community engagement, and codesign an Innovation Hub pilot program was created to address these challenges and focus on transforming the entrepreneurial ecosystem into a more cohesive and collaborative environment for the region's entrepreneurs to thrive within. This process was overseen and supported by a committee identified in this plan as the Hub Group with representatives including entrepreneurs, ESOs, and higher education.

This pilot program will house and direct staff, funding, and programming dedicated to fostering connections, collaboration, and alignment among the ESOs, governments, higher education, and, most importantly, entrepreneurs in the Southern Oregon region. This unique and innovative approach to a regional Innovation Hub will put entrepreneurs at the center of all efforts by uncovering opportunities for collaboration, filling gaps in services, and reducing duplication of efforts. Through these interactions, the Hub's Ecosystem Steward will help create a more cohesive and supportive entrepreneurial ecosystem greater than the sum of its parts while simultaneously amplifying the work of each ESO and program already underway.

The benefits of this initiative will be manifold. Entrepreneurs will gain access to a more integrated and comprehensive suite of support services, enabling them to navigate their entrepreneurial journey more effectively and be supported/nurtured every step of the way. In concert, ESOs, with the aid of the Innovation Hub, will be able to leverage each other's strengths and resources, leading to more impactful and efficient programming. By intentionally aligning the region's efforts, the Innovation Hub will foster a more vibrant entrepreneurial ecosystem, stimulate economic growth, and ensure that Southern Oregon continues to be a fertile ground for innovation and entrepreneurial success. Every resource put towards reducing friction and making the ecosystem healthier now will pay dividends for decades to come. This is not just an investment in our entrepreneurs but a strategic investment in the future of Southern Oregon.



---

# Project Background



# Project Background

To support the 10-Year Innovation Plan released by Business Oregon in 2021, key decision makers at the organization launched a regional innovation hub initiative to support the creation of a thriving innovation economy across the state. They intend for these hubs to “build and advance a regional innovation ecosystem.”

- Business Oregon ([BO Hub resource website](#))

To this effect, Business Oregon funded the Southern Oregon region to engage in hub planning, with the intent that these efforts would result in a subsequent application for additional funding to support an innovation hub in the region. This opportunity came at the perfect time for Southern Oregon, which had recently endeavored to spark momentum in this space through a strategic initiative regional partners branded “One Rogue Valley” in the region’s most recent Comprehensive Economic Development Strategy (CEDS). This “One Rogue Valley” initiative, facilitated by Southern Oregon Regional Economic Development, Inc (SORED), began identifying ways to help regional partners work better together and catalyze new opportunities for regional innovation, economic diversification, and regional resilience.

These initiatives are highly symbiotic, as Business Oregon suggests:

*“Hubs should be an innovation cultivator and a facilitator of networking, serving as a regional network of service providers and their collaborators to assist Oregon’s innovation-based companies in achieving growth. The intent of the Regional Innovation Hub program is not to create a new entity but to incentivize the coordination of existing resources to maximize support for innovation-based entrepreneurs. Hubs must be intentional in partnering and collaborating with a variety of innovation-related stakeholders in the region, especially including underserved entrepreneurs in their partnerships.”* ([BO Hub resource website](#))

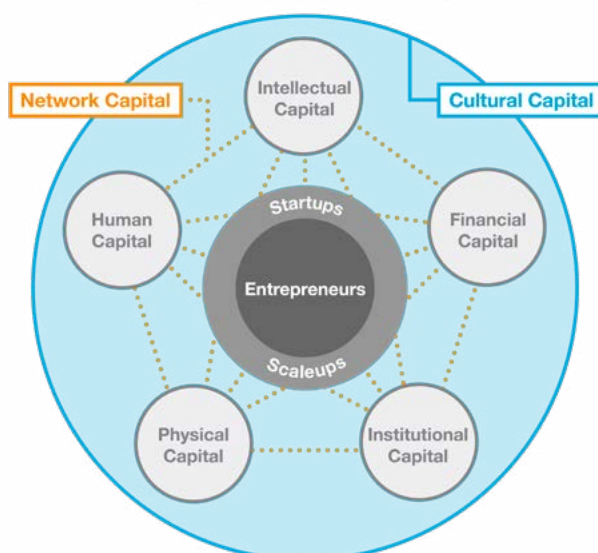
With planning funds received from Business Oregon, SOREDI convened the **Southern Oregon Innovation Hub Group** (Hub Group)

Business Oregon desires that the regional Innovation Hubs will focus on the core programming areas while remaining industry-agnostic and inclusive of historically underserved populations:

- **Technical Assistance**
- **Access to Capital**
- **Networking**
- **Talent Development**
- **Mentorship**

GRAPH 1.1

## 7 Capitals of Startup Communities and Entrepreneurial Ecosystems



## **Southern Oregon Innovation Hub Group:**

### **ENTREPRENEURS**

**Abigail Schilling** - Medford Coworking Collective

**Jim Teece** - Project A

### **ENTREPRENEUR SUPPORT ORGANIZATIONS**

**Cat Bonney** - Common Connections

**Colleen Padilla** - SOREDI

**Dave Tribbett** - SORIN

**Josie Molloy** - Grants Pass & Josephine County Chamber of Commerce

**Amy Browne** - SOREDI

**Marshall Doak** - SOU SBDC

**Marta Tarantsey** - Business Oregon

**Ruth Swain** - RCC SBDC

**Tyler Worthley** - Rogue Workforce Partnership

### **EDUCATION**

**Kim Freeze** - Rogue Community College

**Tanea Browning** - Crater Works

**Vincent Smith** - Southern Oregon University

to oversee the region's hub planning process and contracted with Civic\* Possible to manage the project through its discovery, codesign, and planning phases. The discovery phase included conducting a region-wide assessment identifying and documenting the region's assets, gaps, challenges, and opportunities through a survey, quantitative data research, and more than 100 one-on-one interviews with stakeholders across Jackson and Josephine counties.

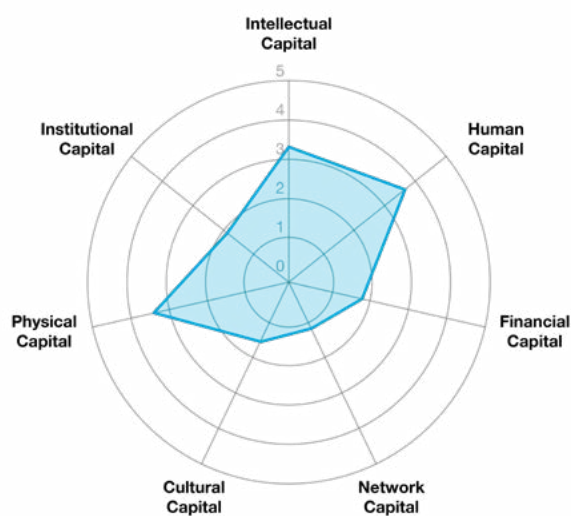
The discovery work identified that the region boasts an exceptional array of the exact resources Business Oregon is looking for a hub to offer.

Expanding on Business Oregon's model to incorporate the 7 Capitals from Brad Feld and Ian Hathaway's, "The Startup Community Way," it was recognized that Network and Cultural Capitals are significantly underdeveloped. In short, the resources needed for a thriving entrepreneurial ecosystem are already in place. However, innovators and entrepreneurs would benefit from an ecosystem with increased interconnection, meaningful collaboration, and alignment between service providers.

With the results of the discovery process in hand, the Hub Planning Group, with Civic\* Possible came together in one-on-one meetings and a series of co-design and community feedback sessions to conceptualize a hub model that would align the region's existing assets to capitalize on the region's opportunities.

GRAPH 1.2

## **Stakeholder Assessment of Current State of 7 Capitals**



The resulting design does not include the physical infrastructure often associated with a hub. However, the initiative exemplifies and takes into account the key areas of focus identified by Business Oregon and several key lessons from “The Startup Community Way” as identified by the American Center for Entrepreneurship. Specifically, the result:

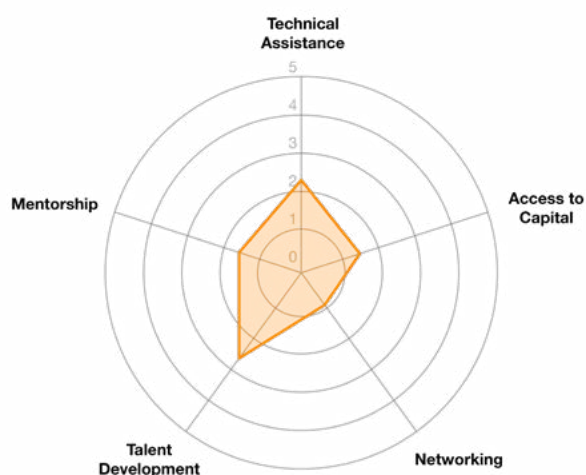
- **Ensures the promotion of collaboration, connectivity, and shared learning as well as optimization of support for startups, organizations, and programs, etc.**
- **Recognizes there is more than one type of capital**
- **Supports people and networks over buildings and institutions**
- **Meets the region’s needs and reflects unique local conditions**
- **Prioritizes agile experimentation and learning over rigid planning and execution**

This Innovation Hub plan documents the resulting unique and dynamic hub model that encompasses all the programmatic goals of Business Oregon while identifying a location-agnostic approach capable of meeting the diversity of the region’s existing and future entrepreneurs. Southern Oregon’s leaders and engaged stakeholders believe this will best serve their dispersed communities through the reinforcement and growth of existing connections, the catalyzation of new collaborations, and the creation of conditions that will allow the entrepreneurial ecosystem to thrive, resulting in increased innovation and entrepreneurial endeavors.

While specific details regarding a second funding round remain unannounced by Business Oregon, the first round has already catalyzed the exploration of opportunities to enhance Southern Oregon’s existing ecosystem and the One Rogue Valley concept.

GRAPH 1.3

### Stakeholder Assessment of Existing Regional Programming Using Business Oregon's Five Programming Areas for an Innovation Hub



*“History and local context matter in complex systems. The startup community should focus on being the best version of itself, rather than competing with or replicating something else.”*

**Startup Community Way, Brad Feld**



---

# Needs Assessment



# Needs Assessment

---

An ecosystem assessment conducted in the first months of 2023 and published in the Innovation Hub Planning Phase One Report revealed a fragmented entrepreneurial support landscape, with Entrepreneurial Support Organizations (ESOs) operating in silos, leading to disjointed efforts and a lack of cohesive support for entrepreneurs. During interviews and focus groups with community stakeholders, it was repeatedly acknowledged that:

- **Entrepreneurs are unsure who, if anyone, offers support services,**
- **ESOs have limited awareness of other ESOs' services and programs, and**
- **the region lacks effective relationships and communication channels between organizations to support entrepreneurs on their unique paths.**

Brad Feld & Ian Hathaway's model of 7 Capitals identifies these weaknesses as indications of underdeveloped Network and Cultural Capitals. Ecosystems weak in Network Capital often exhibit the following:

- **Limited access to resources for entrepreneurs**
- **Missed collaborative opportunities**
- **Less mentorship and learning**
- **Difficulty attracting investment**
- **Reduced visibility of startups and the ecosystem as a whole**

Stakeholders identified all five of these points as a serious challenges in the region. Simultaneously, the absence of robust Cultural Capital in Southern Oregon further exacerbates the challenges presented by limited Network Capital. As with other entrepreneurial ecosystems without strong Cultural Capital, Southern Oregon faces challenges in:

- **Resistance to innovation (lack of risk-taking)**
- **Difficulty attracting/retaining talent**
- **Less collaboration**
- **Difficulty securing funding for startups**
- **Limited resilience (fear of failure)**

The Innovation Hub, guided by its staff, Governance Board, and partners, is poised to address these challenges head-on. Together, they are critical to bridging these gaps and fostering a more cohesive, collaborative environment for entrepreneurs. By fostering connections, collaboration, and alignment among ESOs, local government, and entrepreneurs, the Hub will catalyze a more integrated entrepreneurial ecosystem.

The market need for such an integrated approach is evident not just through the Phase One Report but in simply speaking with a local entrepreneur who has attempted to navigate the existing ecosystem. This unique approach to an Innovation Hub will stimulate economic growth by fostering a vibrant entrepreneurial ecosystem and ensuring that Southern Oregon becomes an increasingly fertile environment for future innovation and entrepreneurial success.

---

# Innovation Hub Proposed Model



*Image credit: Photography by Wes*



# Innovation Hub Proposed Model

The success of the Southern Oregon Innovation Hub, like many economic development initiatives, heavily depends on the availability of resources and the commitment of all participants for the duration of the endeavor. This plan is built on the assumption that the Hub will operate with optimum levels of funding and partner support.

A key aspect of this initiative is its design as a pilot program intended to sunset in five years. This limitation serves several critical purposes:

- **It avoids the creation of yet another organization that would be locked in perpetual competition for funding**
- **It ensures existing partners do not feel threatened or encumbered by the advent of a new, permanent entity in their community**
- **It will add urgency to the ushering in of a transformation in practices and habits among community partners**

During this five-year timeframe, it is anticipated that community partners will cultivate and internalize norms and best practices revolving around collaboration, joint projects, and robust entrepreneur support systems that they will be able to carry forward for decades to come regardless of continued funding for the Hub. In doing so, this initiative aims to be a catalyst for change rather than an institution seeking perpetuity.

To address potential resource challenges, alternative plans with limited scope and funding requirements are detailed in the Appendix B. These contingencies ensure the core objectives are achievable, even if facing resource constraints.

In all scenarios, the underlying principle of the Hub is the same – to serve as a springboard for lasting, positive change in the way innovation is fostered and nurtured in Southern Oregon. The transient nature of the Hub is deliberate and aligned with this overarching goal.

*“You do not rise to the level of your goals. You fall to the level of your systems.*

*Your goal is your desired outcome. Your system is the collection of daily habits that will get you there.*

*This year, spend less time focusing on outcomes and more time focusing on the habits that precede the results.”*

***Atomic Habits, James Clear***

# Vision

The following vision statement incorporates not only the draft vision identified in the Hub Group co-design workshops but also integrates ideas and intent from over 100 one-on-one conversations:

The Southern Oregon Innovation Hub will propel the adoption of the One Rogue Valley initiative identified in the region's CEDS by intentionally stewarding increased cohesion between all regional partners in service of entrepreneurs and amplifying new and existing programs for innovators. This vision will support the overall entrepreneurial ecosystem, enhancing collaboration and the exchange of ideas, and build a brighter, more resilient, and prosperous future for all.

***“The Rogue Valley Innovation Hub connects entrepreneurs from different areas to collaborate, exchange ideas, and build a brighter future together.”***

*Preliminary vision for the Innovation Hub identified by 23 key stakeholders in a co-design session*

# Goals

The initiative should accomplish the following goals to achieve this vision:

**Build a hub:** Establish a team and platform that will serve as the interconnection between existing organizations to foster increased collaboration and gradually transform siloed practices.

**Support collaborative programming:** Assist partners with their innovation-based programs, identify and encourage new joint programming opportunities, run unique programs where applicable, and manage an event/programming fund to support unique programs for entrepreneurs that also increases collaboration amongst ESOs

**Harness collective resources:** Secure resources from both within and outside the region to support regional efforts and maximize the impact and reach of our initiatives

**Recognize and build upon success:** Work with all partners to regularly measure the health of the Rogue Valley economy in meaningful ways

In essence, the Rogue Valley Innovation Hub will create a collaborative platform that fosters innovation and creativity, nurtures a thriving entrepreneurial ecosystem, and drives economic growth and job creation in Southern Oregon. By fostering greater alignment and collaboration between existing service providers and working together in new capacities, the Rogue Valley can position itself as a hub of innovation and entrepreneurship, attracting talent and investment from around the world.

# Hub Design

Assuming full funding is secured, the Southern Oregon Innovation Hub will function at peak capacity, ensuring it is in an ideal position to fulfill its five-year mission of transforming the regional ecosystem by fostering enhanced collaboration, collective action, and new operational efficiencies across the region's entrepreneurial service organizations.

The Hub will be governed by a Governance Board composed of a collective of the region's ESOs and entrepreneurs, with day-to-day activities carried out by its staff, a senior Ecosystem Steward and an accompanying Ecosystem Associate. This dynamic duo will execute the critical activities that align with the Southern Oregon Innovation Hub's mission and vision as defined by the Governance Board (described in the Governance section on page 20).

In sync with the Governance Board's strategic vision, the Hub will aim to expand regional efforts in three core areas, collectively identified during the Planning Phase: ecosystem stewardship, meaningful networking events, and educational programming. It is expected these efforts, in turn, will facilitate a surge in new and expanded entrepreneurial ventures throughout the region.

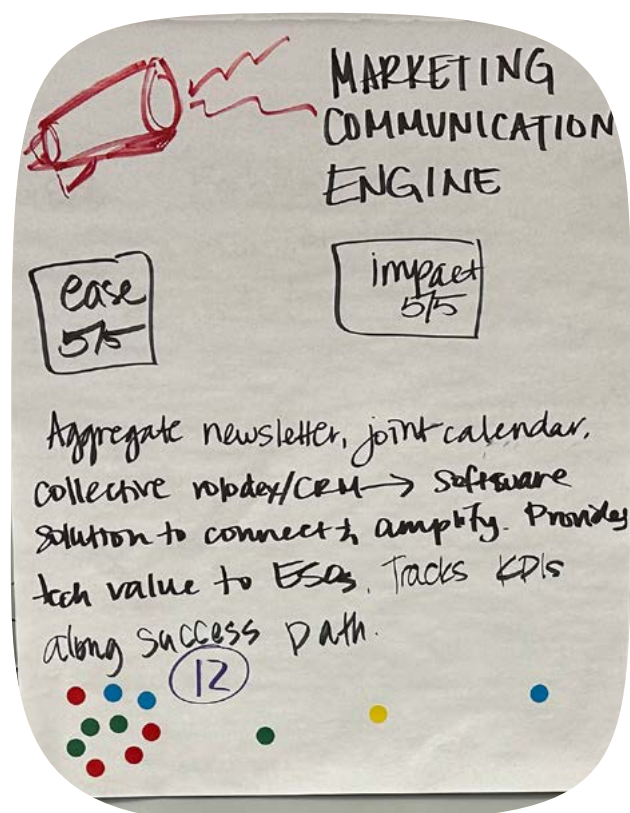
## Services and Initiatives:

### 1. COLLABORATIVE SUPPORT ENGINE

"Collaborative Support Engine" is the term arrived at through the co-design phase involving a diverse group of 27 participants.

The activities of this focus area encapsulates the critical need to drive towards deep collaboration between existing & emerging organizations and entrepreneurial support services in Southern Oregon so entrepreneurs seamlessly experience support irrespective of their unique journeys.

This focus area stems from the acknowledgment that the Rogue Valley's ecosystem is operating suboptimally, largely owing to the scarcity of Network and Cultural Capitals. To dismantle existing silos and recalibrate the ecosystem towards a new normal of generative collaboration, the following components of a "Collaborative Support Engine" should be pursued.





## 1.1 ECOSYSTEM STEWARDSHIP

The Ecosystem Steward (Steward) and Ecosystem Associate (Associate) positions will be key to the success of the entire program. These positions will serve a pivotal role within the entrepreneurial ecosystem, acting as a connector and facilitators between the various organizations, services, and programs.

They will work together to understand the ecosystem's structure and dynamics, as well as identify opportunities for collaboration and synergy. Additionally, they will identify opportunities for partnership, manage the administration of collaborative activities, facilitate joint initiatives, amplify the work of existing ESOs, and promote a culture of cooperation and mutual support. Their role will not just be about creating new connections but also nurturing existing ones, ensuring that the ecosystem thrives on the collective strength of its members.



**Ecosystem Steward**

Furthermore, the Steward will nurture the ecosystem by promoting and exemplifying values and behaviors associated with a collective and collaborative approach. Through leading hub projects and supporting ecosystem partners with their own, the Steward and Associate will ensure the values of collaboration, innovation, and mutual respect are embedded in the ecosystem's practices and processes.

The Steward will also promote a culture of creativity and experimentation by facilitating the exchange of ideas and knowledge and supporting initiatives that drive innovation and growth. Together this team will take a holistic ecosystem approach to provide partners with a new opportunity to work together effectively toward the common goal of the overall health and success of the entrepreneurial ecosystem in Southern Oregon.

## 1.2 BUILD AND MANAGE A HUB PLATFORM

A digital hub platform will be key to facilitating information sharing and coordinating efforts across various resources in Southern Oregon. Initial research will need to occur to identify the ecosystem's needs and evaluate potential ecosystem management platforms like [ramenlife](#) or [ECOMAP](#). Once a platform is chosen and built out, there will likely be a lag before it is successfully adopted.

It will be important to persevere and continue to use the platform during this lull as habits build over time, and the true value will be found in the critical mass of data it aggregates in the future. To support this effort, the Steward and/or Associate will likely have to initiate an engagement plan as the platform is rolled out to drive partner engagement and ecosystem-wide adoption until a critical mass of users regularly engages on the platform unprompted.

### 1.3 FACILITATE REGULAR ESO MEETINGS

Relationships are the key to everything, and to build more robust network and cultural capital, the Hub will facilitate regular meetings and other interactions between ESOs and adjacent ecosystem partners. This effort will be slow, take time, and pay enormous dividends to the ecosystem for decades to come.

### 1.4 360° REVIEW OF ECOSYSTEM

To ensure the Hub's work results in its intended outcomes, gauge overall ecosystem health, and facilitate deeper understanding amongst all partners, the Hub will run an annual ecosystem-wide diagnostic. The for purpose this is first to establish a baseline, then second to facilitate a year-over-year comparison of progress.

The exact format of this annual review will need to be drafted and agreed upon by partners but could look something like a series of surveys and interviews where participating ESOs, entrepreneurs, businesses, higher education partners, local government, and any others identified as key to the health and wellbeing of the ecosystem, provide feedback on how they think their organization is doing, as well as evaluate how other partners are doing. This information could then be shared at an aggregate level with each organization to aid in self-reflection and help them understand what they are doing well and where there may be opportunities for improvement.

### 1.5 FACILITATE COLLABORATIVE PROGRAMMING

Because of the unique interstitial role of the Hub, the Steward, and Associate will have insight into all the happenings occurring in the ecosystem. This vantage point will position them to be uniquely able to identify when and where programs being run have synergy with other ESOs.

With this insight, they will be able to encourage collaboration and facilitate cooperative opportunities for partners to work together on common initiatives and activities. Concurrently, if a program important to holistic ecosystem health is identified but falls outside the scope of any partners, the Hub will plan and run the program on behalf of all partners.

*"In an entrepreneurial ecosystem, synergies are a primary source of value creation in a complex system, the interaction of the components in the system is the whole point. Many startup community efforts miss this. Instead of paying attention to the interactions, they focus on the individual parts. This follows linear systems thinking whereby an increase in critical inputs (resources like capital and talent) increases desired outputs (startups) and outcomes (value creation). The problem is, more of everything doesn't work. The appeal of more of everything is understandable—the actions are controllable, tangible, and often immediate. But over the long run, more of everything disappoints unless the participants in the startup community address underlying social, cultural, and behavioral obstacles. Attempts to foster innovation that do not focus on changing human behavior are doomed to fail."*

***The Startup Community Way: Evolving an Entrepreneurial Ecosystem, Brad Feld & Ian Hathaway***

## 1.6 MANAGE COLLABORATIVE PROGRAM FUND

When operating at full capacity, the Hub will set aside a certain amount of financial capital annually to assist with collaborative regional innovation programs and events. This fund will act as a grant fund for area partners to access in support of their organizations' programming, so long as it encourages innovation and builds network and cultural capital in the ecosystem. Depending on the demand for this funding, additional guidelines may need to be put in place to ensure it is allocated equally and equitably across the ecosystem.

## 1.7 PROVIDE STAFF SUPPORT TO ESOS

Hub staff will make themselves available when appropriate for a limited number of hours to support ESOs and other partners with capacity challenges. This initiative will directly support partners in unique circumstances, build trust in the Hub and its staff, and support the ecosystem in critical times of need.

## 2. MEANINGFUL NETWORKING

Innovation comes not from a single place but through the interconnection and exchange of people and ideas. The Innovation Hub will focus on networking programs and events designed to facilitate and accelerate the diversity, frequency, and depth of interactions across the network. To this end, the Innovation Hub will assist existing organizations in designing and running their own programming and, where appropriate, run programming for the benefit of the ecosystem as a whole. The following highlight key activities identified through the co-design process to do just that.





## 2.1 MENTORSHIP NETWORK

This collective, region-wide super network of mentors will effectively weave together existing Southern Oregon mentorship networks. By intentionally coordinating the existing networks and fostering cross-connectivity of mentors and mentees, this initiative will stimulate meaningful and impactful relationships that are vital in driving increased opportunities for startup success.

This expansive platform, where mentors and mentees, who might have been siloed in different networks, can now effortlessly connect, ensures the best opportunities to exchange knowledge, share experiences, and collaborate on innovative ideas. Integrating these disparate networks into one cohesive one will optimize resource utilization, facilitate the sharing of best practices, and ultimately empower the region's entrepreneurs to thrive and succeed.



## 2.2 PUB TALKS

Pub Talks is a generic term used for events that happen across the nation that focus on engaging entrepreneurs with each other and ESOs around a relevant public presentation in a casual environment. They are repeatedly identified as high impact, easy access programming. The Innovation Hub's role in Pub Talks could take two possible avenues. To run them on behalf of all regional partners, or support regional partners in making their own Pub Talks more diverse and accessible to a larger audience to expand the impact and interconnectedness across entrepreneurs in the ecosystem. (see examples on page 23 for more information)

## 2.3 LOCAL IMPACT SOLUTIONING

This endeavor focuses on solving real needs through community-wide open-source innovation. Through the use of a Hub-facilitated online portal and in-person events, local businesses, entrepreneurs, non-profits, and public entities will be invited to share pressing challenges that require innovative solutions.

These challenges will then be aggregated and made available to individuals and teams who can work collaboratively to address the need. At various points in the process, Hub staff, and potentially other ESO partners, will be available to aid participants in the process of selecting which submitted topics to address and facilitating sprints and workshops as needed to assist participants in ideation, solutioning, and implementing the solution. This initiative will tackle impactful local challenges, build a deeper network of problem solvers and identify solutions to local issues that could potentially be commercialized and turned into new products, services, or companies that help others facing similar challenges.

## 2.4 INNOVATION EXPO

The Innovation Expo will be an annual regional event celebrating the spirit of innovation and entrepreneurship in Southern Oregon. Hosted on a rotating basis throughout the communities of Jackson and Josephine Counties, this inclusive event will draw the interest of not just entrepreneurs and existing business owners but also the general public, including youth, retirees, and traditionally underserved populations, to promote a broader understanding and appreciation of the entrepreneurial journey.



This innovation expo will honor both the triumphs and tribulations of local startups and ideas, acknowledging that each step, regardless of outcome, contributes to the rich tapestry of entrepreneurship. Celebrating successes and failures alike, it will aim to inspire and motivate, emphasizing the value of resilience and the lessons learned in the pursuit of innovation.

The ultimate intent of this annual celebration will be to increase hope and foster a vibrant and supportive entrepreneurial culture that encourages creativity, risk-taking, and collaboration within the Southern Oregon community.

## 3. EDUCATIONAL PROGRAMMING

In close concert with its other programming, the Hub will also focus on ensuring entrepreneurial and innovation-based education occurs across the region.

This will happen through offering assistance to ESOs and partners offering existing programming or, where appropriate, running new programs through the Hub itself. The Hub will likely spot additional educational programming opportunities as it ramps up operations, and all program offerings should be evaluated regularly.

### 3.1 STARTUP SPRINTS PATH TO PITCH

These short-term programs (Sprints) will focus on exploring and validating aspiring innovators' business concepts and ideas, helping to determine whether a genuine market exists for their proposed products or services. It will offer robust insights on how to: validate their underlying assumptions about market demand, conduct effective customer discovery, and evaluate the potential worthiness of pursuing their ideas further.

By participating in this focused program, individuals will gain valuable tools and



knowledge, enabling them to make informed decisions about the potential and direction of their entrepreneurial pursuits prior to committing to the lengthy process of creating a business plan or participating in a full business bootcamp. This initiative exemplifies a commitment to nurturing the initial seeds of innovation and supporting the growth of tomorrow's successful entrepreneurs and innovators.

### 3.2 BUSINESS BOOTCAMP

The business bootcamp will be a periodic immersive training program designed to equip aspiring entrepreneurs with the practical skills and knowledge necessary to kickstart their businesses. Through harnessing a cohort-based model, this program will provide attendees with the unique opportunity to engage with a community of peers sharing similar entrepreneurial journeys.

This collective engagement will foster valuable connections and promotes efficient learning, as each member can draw on the experiences and expertise of their cohort peers. Further enhancing this efficiency, entrepreneurial service providers will contribute their specialist knowledge and skills to the program, negating the need for any single organization to shoulder the entirety of running a bootcamp. This initiative seeks to streamline the journey from concept to launch, providing entrepreneurs with a robust platform for success.

### 3.3 REGULATORY NAVIGATION

This educational program will aid current and prospective entrepreneurs in maneuvering through the intricacies of local, regional, and state governmental regulations, procedures, licensing, and other requirements. In recognizing the potential challenges and frustrations associated with what some view to be bureaucratic red tape, this program aims to equip participants with the awareness and know-how to efficiently navigate these processes, reducing roadblocks and delays in their entrepreneurial journey.

By breaking down the complexities of regional jurisdictional requirements, the initiative will aim to smooth the path for entrepreneurs as they launch and operate their businesses. This initiative underscores a commitment to eliminating hurdles and fostering a supportive environment conducive to entrepreneurial success in Southern Oregon.

## Organizational Structure

### GOVERNANCE

The Southern Oregon Innovation Hub's governance structure is designed to foster collaboration among all participating partners by ensuring broad interests are represented in governing the Hub's work. A collaborative governance model with the support and buy-in of volunteers from the region's various ESOs and entrepreneurs will be necessary throughout the Hub's lifecycle.

Specific details regarding the Governance Board, its functions, and policies will need to be determined over the coming months by a Steering Committee that will guide the concept through the multi-month transitional phase between planning and hiring the Ecosystem Steward to manage the program.



It will be crucial that the governing board include a diversity of stakeholders representing every sector of the economic development ecosystem, including entrepreneurs, ESOs, higher education, local government, and others. The Governance Board will be responsible for the selection and guidance of the Ecosystem Steward.

## MANAGEMENT

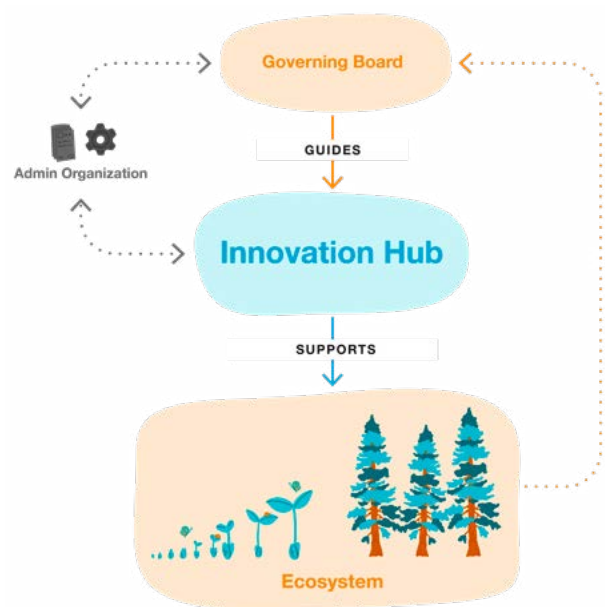
While the Governing Board will provide high-level guidance of the Hub's alignment with its intended mission, vision, goals, and broad oversight of staff, the Innovation Hub itself will be housed within an organization mutually agreed upon to ensure buy-in and neutrality. The organization housing the Innovation Hub

will be responsible for managing funds, HR administration, and any other purely administrative functions not related to the governance or operations of the Hub. This is specifically designed to reduce friction that would occur with one organization owning and influencing the Hub.

The Ecosystem Steward will exclusively manage all additional work of the Innovation Hub. Together with the Governance Board, they will co-create the initial five-year plan the initiative will embark upon. The Steward will be self-managed and solely responsible for day-to-day operational decisions regarding the Hub with guidance and an annual review from the Governance Board.

They will be entrusted with the care and cultivation of the ecosystem as a whole, making every effort to be fair and equitable in their engagement and support of the region's ecosystem and entrepreneurial support organizations. Under their management, the Hub will make programmatic choices that emphasize the primary goals of increasing collaboration, cooperation, and creativity across the ecosystem for the ultimate benefit of the entrepreneurial community.

The following are two hypothetical examples of how the Hub could potentially interface with existing ESOs to offer new and/or expanded programming. Please note, these examples are not prescriptive but rather offer illustrations of how some programs and activities might be supported by the Hub and collaboratively run.



**Southern Oregon Innovation Hub  
Governance Structure**

## EXAMPLE SCENARIO

### Hub-managed programming on behalf of regional partners:

Regional partners collectively decide an Innovation Expo would be an important event for the region; however, none of the partners have the staff or funding resources available to make it happen alone. They request the Hub undertake the effort to lead the planning and execution of such an event. The Steward and Associate identify the scope, funding requirements, and work plan to put on the event. If that meets the regional partners' needs, the Hub moves forward with creating and managing the event on behalf of all the partners.

## EXAMPLE SCENARIO

### **Hub amplifying the impact and collaboration of a regional partner's programming:**

One of the regional makerspaces is extremely excited about the Social Impact Problem Solving activity outlined in the plan. They approach the Ecosystem Steward and Hub and express interest in running the event but need help with financial and/or staff resources to run a successful event. The Hub reviews the resource needs and then does two things 1) allocates necessary resources from the Hub if available and/or 2) coordinates resources from regional partners to collaborate with the makerspace to make the event successful. Together this will build stronger interconnections between partners and reach a broader audience.

While the Hub's staff focuses on day-to-day ecosystem coordination, support, planning, and programming, the Governing Board will provide high-level oversight to the Hub's alignment with its intended mission, vision, and goals. The Board will collaborate with the Hub's staff to create a five-year plan and review the Steward's annual recommendations for updates to that plan.

Their main objective, however, will be to conduct an annual review to assess whether the Hub is performing the essential work that drives its mission forward and to determine if its actions are indeed supporting the ecosystem and all participating partners equitably and in a fashion that is truly creating a more collaborative and cohesive ecosystem that benefits the region's entrepreneurs, aspiring innovators, and existing business owners.

## TRANSITIONARY PERIOD

As the current Hub Group's planning efforts wind down over the last half of 2023, it will be necessary to transition the work to a hands on Steering Committee responsible for starting up the operational Hub. Members should be composed of diverse representatives from the ecosystem who may be new to the initiative, or from the Hub Group, or a mix thereof. The reason for designating this as a Steering Committee is to recognize the difference in roles and responsibilities from the Hub Group, Steering Committee, and the Governance Board. The Steering Committee will need to undertake the work of choosing a host organization for the initiative, seek out and secure funding for initial operations, evaluate this business plan's governance recommendations, set up the governance model it identifies as a fit, and if funding is secured, identify and hire staff for the organization.

# SWOT Analysis



## STRENGTHS

- There is a wealth of existing programming available through regional partners
- Existing organizations have a desire to “do better” as a region
- A diverse array of ESOs offer ample entry points into the ecosystem
- ESOs are distributed and available throughout Southern Oregon
- Region’s CEDS previously identified the “One Rogue Valley” initiative
- The area offers a high quality of life
- An accessible and highly connected population of innovators



## WEAKNESSES

- A perceived separation between communities
- Limited resources incentivize competition between ESOs for limited resources and memberships
- An attitude of “We’ve tried working together before, and it hasn’t worked”
- Incentives between organizations are not aligned for cooperation
- The community perception that too many organizations offer similar support can make it confusing for entrepreneurs trying to navigate the ecosystem
- Most ESOs have zero capacity to take on change or additional programming



## OPPORTUNITIES

- Fill the inspiration gap - convince more people they can be entrepreneurs
- Pivot existing programming to focus on more innovation-based businesses
- Evolve the mindset of ESOs on how they can work together differently & more impactfully
- Run events & programming that a single organization could not effectively accomplish
- Expand the net through which entrepreneurs are pulled into the network
- Change the way ESOs currently meet the collective demands of the emerging economy



## THREATS

- An “Old guard” mentality prevents innovators from coming forth to participate in the ecosystem
- A lack of funding results in the inability to hire an ecosystem Steward
- Not getting minimum viable buy-in from partners, or alternatively, inauthentic buy-in
- A few organizations try to usurp the program and make it their own to benefit individual interests
- People will burn out if everyone leans in and tries to make this happen, and then it fails\*

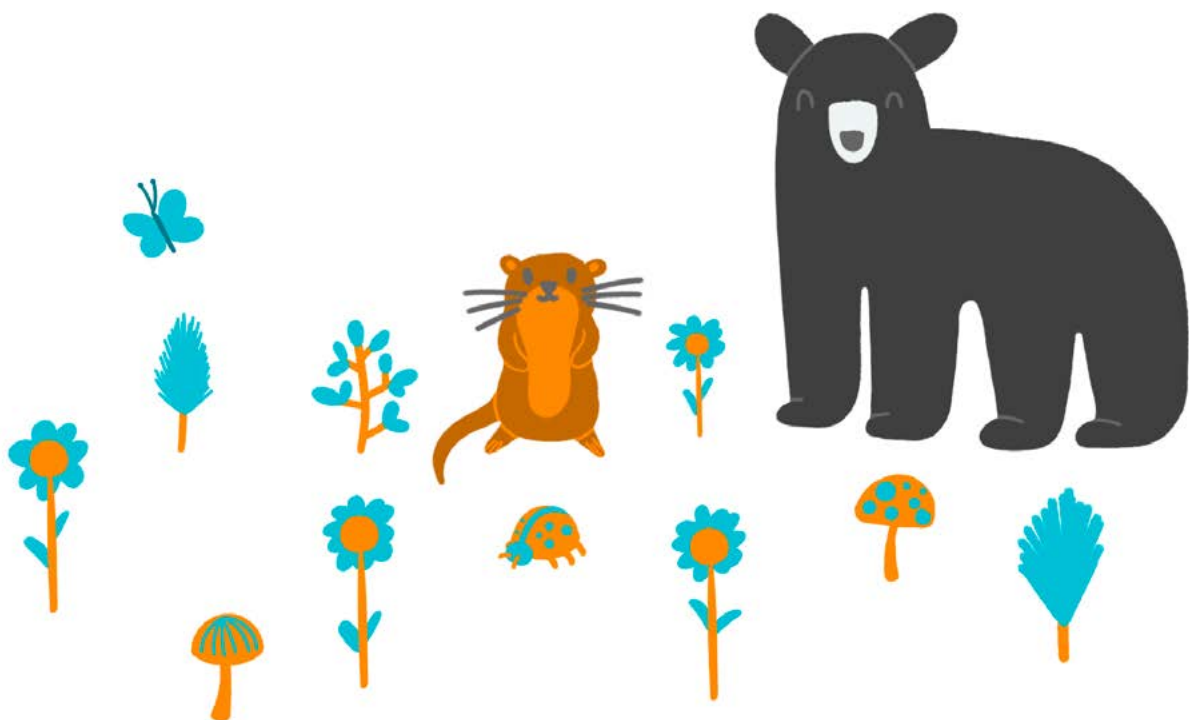
\*Focus on slow and incremental wins rather than single large successes

# Diversity, Equity, & Inclusion

Throughout the process leading to this plan, it was recognized that the Innovation Hub would take a unique approach to support serving and engaging underserved and historically marginalized populations. Unlike many public-facing programs, the Innovation Hub's direct engagement with entrepreneurs will be limited as its core focus is strengthening the ecosystem by amplifying the work of regional partners. Consequently, the focus on Diversity, Equity, and Inclusion (DEI) initiatives will shift toward supporting and amplifying the DEI efforts of each Entrepreneurial Support Organization (ESO) engaging with the Hub.

Many of the region's ESOs have already instituted DEI policies and practices tailored to their unique needs, goals, and the populations they serve. With this in mind, the Hub will identify and share best practices among existing regional partners and more broadly across the state and the nation rather than creating a separate set of DEI measures that may not be relevant to each and every partner.

This collection and sharing of relevant and impactful DEI best practices, outreach methods, and engagement strategies, can then be referenced and employed by local partners looking to improve their engagement and support of targeted underserved populations. This approach contributes to the continual improvement and synchronization of DEI practices across the ecosystem while avoiding the creation of potentially inauthentic criteria and metrics that every partner will be asked to employ.





---

# Marketing and Engagement Strategy



# Marketing and Engagement Strategy

---

For greatest impact, marketing and engagement strategies for the Hub must be uniquely conceived for the three main audiences: the partners (ESOs), existing and potential funders, and the end users (entrepreneurs). This section dives into each of these audiences, what matters most to them, their primary interest in the Hub, specific communications to consider, and marketing messages to carry forward.

While on the other hand, it needs to demonstrate to current and future funders that their investment is yielding tangible results, contributing to economic development, and fostering innovation and growth in the region. Concurrently, the Hub and its ESO partners must also articulate the opportunities their activities and programs offer to end users, the entrepreneurs and innovators of Southern Oregon.

This multi-prong focus necessitates a trifurcated marketing approach. The Hub must tailor messaging and communication strategies to resonate with each group effectively. For end users, the initiative needs to highlight the resources, support, and opportunities the Hub and its ESO partners provide. In contrast, sharing the broader economic impact and success stories will be critical with funders. Additionally, keeping ESO partners apprised of the region's progress toward shared goals will be important. The following sections detail marketing strategies to reach each target audience.

## REGIONAL PARTNERS

The marketing strategy for local Entrepreneurial Support Organizations (ESOs) and other area partners will primarily focus on relationship-building and continuous communication. This will involve cultivating and continuously nurturing one-on-one relationships, demonstrating the power of collective collaboration, and potentially leveraging digital platforms for ongoing engagement of all partners.

These activities driven by the Ecosystem Steward and supported by the Ecosystem Associate will ensure all ESOs and partners are well-informed, actively engaged, and committed to the shared goals, thereby enhancing the overall vibrancy and success of the entrepreneurial landscape in the region.

## FUNDING PARTNERS

Engaging funding partners, which may include the State of Oregon, the federal government, regional foundations, high net-worth donors, and local ESOs, will require a multifaceted approach emphasizing transparency and highlighting milestones achieved. It's crucial that this strategy reflects not just the Hub but also the Southern Oregon region as a whole. Keeping funders informed about the progress of the initiative and the evolving dynamics within the ecosystem will likely shift regularly due to varying reporting requirements.

Each will benefit from consistent one-on-one meetings, a quarterly newsletter, and an annual report on the activities of both the Hub and the Southern Oregon ecosystem. Furthermore, finding opportunities to involve the initiative's funders in regional events through roles such as speakers,

mentors, and judges will encourage a sense of ownership and involvement in the ecosystem. Such concerted efforts will ensure clarity in the utilization of invested dollars and provide funders with a front-row seat to witness the impact of their contributions, reaffirming a collective commitment to bolstering innovation in Southern Oregon.

## END USERS

The marketing strategy for end users, including existing and aspiring entrepreneurs, ideators, and small business owners, will require a collaborative effort between the Hub and its partners. When ESOs run a program, the responsibility of messaging and marketing events will continue to fall on the respective lead organization though amplified by the Hub.

Meanwhile, marketing content for Hub-run programming will be created by staff and dispersed through participating partners' existing channels to reach each organization's audience. This approach ensures a broad reach and leverages the established networks of partner organizations, resulting in an ecosystem of entrepreneurs and innovators who are well-informed about the resources, opportunities, and events available. This approach also promotes the existing ESOs, keeping them front and center of all activities as the Hub fosters an engaged and vibrant entrepreneurial community in Southern Oregon.





---

# Timeline

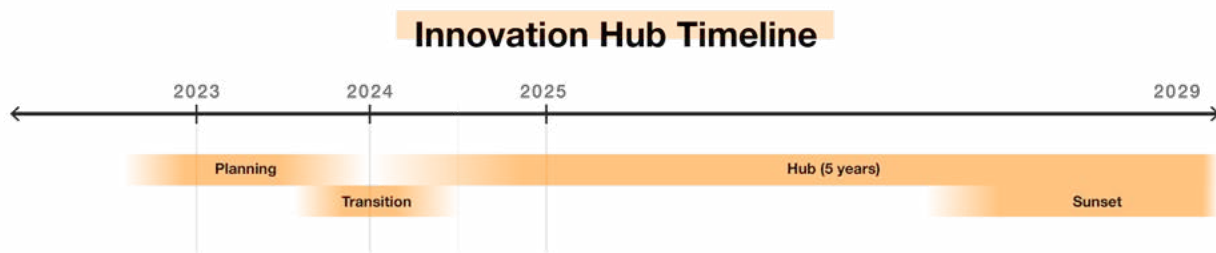




# Timeline

There are two key timelines to consider for the creation of the Innovation Hub. The first is for the creation and operation of the Innovation Hub, and the second is in regards to the community adoption, participation, and impact of the effort. These are estimated timelines and are subject to change based on factors such as funding availability, partner buy-in, and the ability to secure staff. While they provide a general guide, they are flexible and can be adjusted as necessary to accommodate real-time challenges and changes.

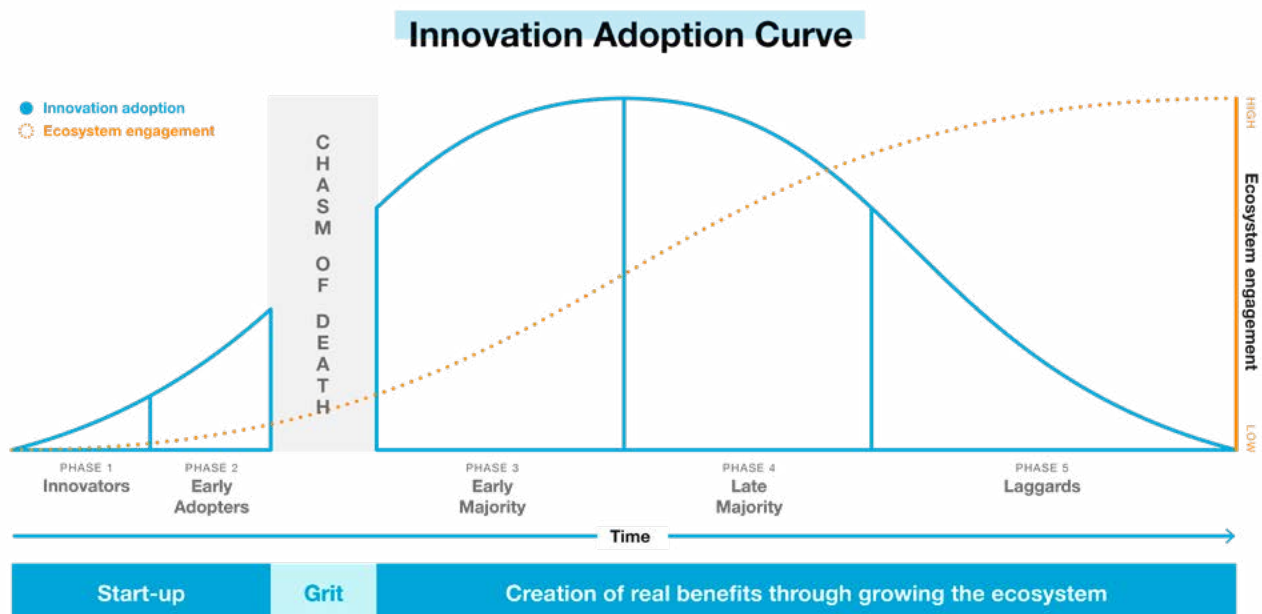
GRAPH 3.1



This unique approach to an Innovation Hub is an innovative model in and of itself. Its seemingly non-traditional approach to building a thriving, supportive, collaborative ecosystem will have a measurable impact in direct correlation to the regional stakeholders' adoption and usage. As such, it is key for partners, staff, and funders to understand the **Innovation Adoption Curve** (Graph 3.2).

While the support and impact will grow as more partners engage, moving through the first two phases and into the third will be challenging for all involved because not only are there limited early adopters to be champions, but there will also be detractors who do not see the value of this unique approach. This mix of limited champions and partners mixed with the friction from detractors to this innovative approach will create what many Innovators refer to as the chasm of death between phases two and three.

GRAPH 3.2



It's crucial to recognize this will be a challenging time, but equally, it will be important to push through because the cumulative flywheel effect will kick in as partners and non-adopters begin to see the resulting impacts and ultimate success in phases three and four.

## NEXT STEPS

**Create the Innovation Hub Steering Committee:** The existing Hub Group should identify who shall serve as a Steering Committee. Members could be identified from the existing Hub Group or new to the initiative so long as they have excitement and capacity to move the Hub initiative through the transition phase. This committee will be responsible for managing the project between the Planning Phase and the formal start of the Innovation Hub with its Governing Board. The Steering Committee will be responsible for securing board partner commitment, identifying and negotiating terms with the administrative organization, creating the Innovation Hub program's charter and policies. The Steering Committee should be a small dedicated group of volunteers representing a mix of entrepreneurs, ESOs, and other relevant partners.

**Stakeholder Engagement:** Begin by engaging key stakeholders in the ecosystem, such as leaders of ESOs, local entrepreneurs, investors, and relevant government officials. Share this proposal to seek their feedback and buy-in. Their insights and support will be critical in the successful implementation of this initiative.

**Role Definition and Recruitment:** Clearly define the responsibilities, qualifications, and performance metrics for the Ecosystem Steward role. Start the recruitment process to find a suitable candidate who has strong networking skills, understanding of diverse entrepreneurial landscapes, and a passion for fostering collaboration and community development.

**Facilitate Regular Meetings:** Establish a schedule for regular meetings between the Ecosystem Steward and individual ESOs, as well as monthly gatherings of all ESOs. These meetings will be key to fostering a deeper understanding of each organization's capabilities and initiatives, uncovering opportunities for collaboration, and identifying gaps in services.

**Develop a Collaboration Platform:** Consider developing a digital platform where ESOs can share information, collaborate, and communicate effectively. This platform could also serve as a one-stop-shop for entrepreneurs seeking support services in the region.

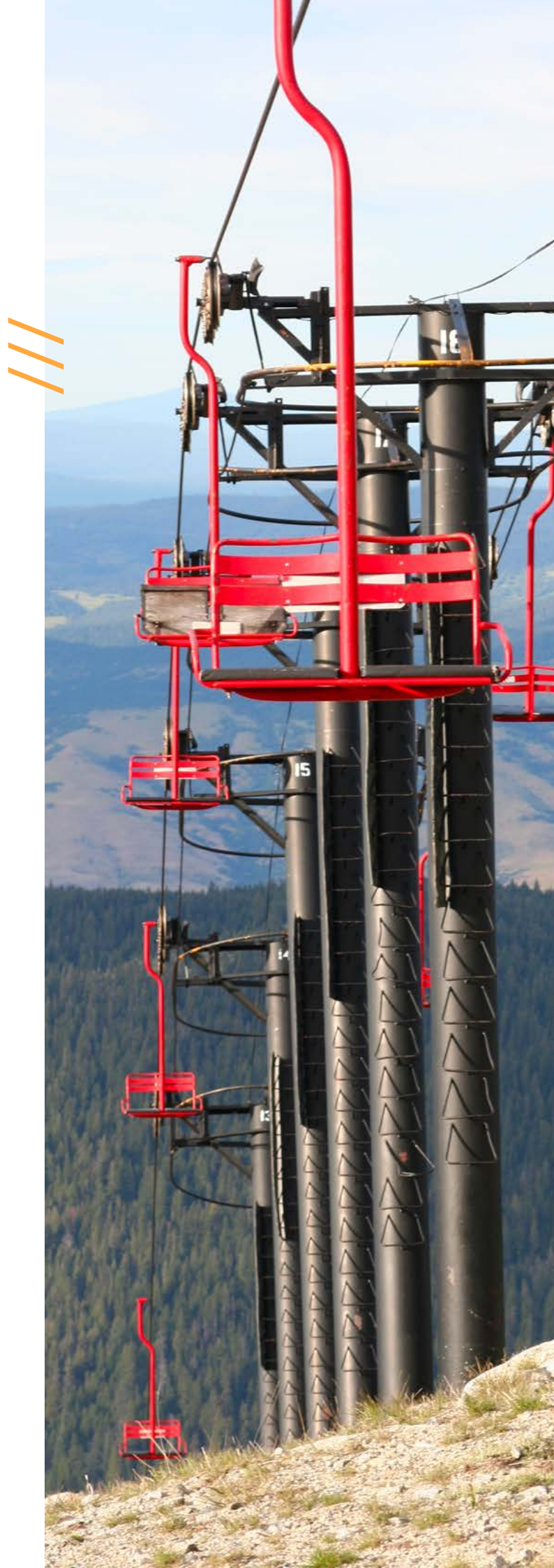
**Monitor and Evaluate:** Regularly monitor and evaluate the impact of this initiative. This could involve tracking key performance indicators related to collaboration between ESOs, the number and success of startups supported, and economic growth in the region.

**Communicate Success:** Share success stories and positive outcomes widely to generate further support for the initiative and to attract more entrepreneurs, investors, and other key stakeholders to Southern Oregon's ecosystem.

Building a vibrant and cohesive entrepreneurial ecosystem **takes time, patience, and sustained effort**. The role of the Ecosystem Steward will be crucial in this journey, but the **collaboration and active participation** of all stakeholders in the ecosystem will be equally important.

---

# Financials



# Financials

This pro forma budget and narrative provide the broad initial framework for partners, staff, and funders. This is an estimate of anticipated costs and revenues around which to begin discussion and not intended as a rigid budget. The financial model and budget for the future hub will be iterative and will need to be refined, agreed upon, and regularly reviewed by the Governing Board and Staff.

	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
<b>INCOME SOURCES</b>					
Local Partner Contributions	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Grant Funding	\$150,000	\$150,000	\$150,000	\$150,000	\$150,000
Program Revenue	\$7,000	\$15,000	\$15,000	\$15,000	\$15,000
<b>Total Income</b>	<b>\$257,000</b>	<b>\$265,000</b>	<b>\$265,000</b>	<b>\$265,000</b>	<b>\$265,000</b>
<b>EXPENSES</b>					
Administrative Partner	\$12,500	\$12,500	\$12,500	\$12,500	\$12,500
Payroll					
Steward	\$80,000	\$82,400	\$84,872	\$87,418	\$90,041
Associate	\$60,000	\$61,800	\$63,654	\$65,564	\$67,531
Benefits	\$42,000	\$43,260	\$44,558	\$45,895	\$47,271
<b>Payroll total</b>	<b>\$182,000</b>	<b>\$187,460</b>	<b>\$193,084</b>	<b>\$198,876</b>	<b>\$204,843</b>
Equipment	\$3,500	\$200	\$200	\$200	\$200
Software Subscriptions	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500
Travel	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000
Programming	\$47,500	\$53,340	\$47,716	\$41,924	\$35,957
<b>Total Expenses</b>	<b>\$257,000</b>	<b>\$265,000</b>	<b>\$265,000</b>	<b>\$265,000</b>	<b>\$265,000</b>
<b>Net</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

## INCOME SOURCES

**Local Partner Contributions:** Having diverse financial support from a broad range of local partners is crucial. Local partner contributions help ensure buy-in and signal to the region that the partners are working together in deep and meaningful ways. This commitment will go a long way toward helping the Innovation Hub move through the first few phases of the Innovation Adoption Curve. Ideally, each ESO (and possibly local governments) will offer funding according to their respective size and available resources. It's crucial that whatever funding amount is provided by partners seems fair. The amount of financial support offered compared to the contributing organization's budget could be the benchmark for fairness. For example, SOU or SOREDI have the ability to provide significantly more funding than the Illinois Valley Chamber; however, the Chamber's contribution receives the same weight as that of the larger entities as their annual budget is smaller.



**Grant Funding:** While enough local funding may be able to be raised to start the Hub, an influx of outside capital would likely accelerate efforts. As part of Oregon's state-wide Regional Innovation Hub Planning process, a limited second round of competitive funding will be available for groups across the state looking to create and operate their proposed innovation hubs. While the details surrounding this follow-on opportunity are currently unknown, only a few regions will likely receive additional funding. Through the planning process, other grants available via state and national organizations, such as the Economic Development Administration's Build to Scale grant program, were identified and can be found in Appendix A.

**Program Revenue:** Without a Governance Board, Staff, or work plan in place, it's challenging to know what programming will be executed by or in partnership with the Hub. This income category recognizes that event sponsorships and admissions will generate some funds for the Hub and its activities. Until there is greater clarity on these elements, Program Revenue is shown as static.

## EXPENSES

**Administrative Partner:** The Innovation Hub will reside in an existing organization, and that organization will receive a payment equal to 5% of non-programming income for their administrative support.

**Payroll:** Salaries are calculated based on industry standards for the skill levels required for the positions. Calculations include an annual 3% cost of living increase and benefits at 30% of base wages.

**Equipment:** Estimate for initial computers and other office equipment.

**Software Subscriptions:** This line item allocates funding for the various basic administrative software subscriptions necessary to manage the day-to-day operations of the Hub as well as subscription fees for a future Hub platform of staff's choosing.

**Travel:** Funds identified for state/national travel for networking, education, and staff professional development.

**Programming:** Until there is greater clarity and prioritization by staff and the Governing Board on these elements, Program Revenue is shown as the difference between total income and core costs. These funds are set aside for programming identified and prioritized by the Hub's staff and Governing Board. Any remaining funds at time of Innovation Hub dissolution shall be redistributed to level funding partners proportionally according to their contributions to the Innovation Hub.

---

# Metrics for Success



# Metric for Success

Establishing goals for the Hub will be important to provide early guidance for the Governing Board, Staff, regional partners, and funders. Goals fall into two categories Overarching Goals and SMART Goals. Overarching Goals focus on the program's mission and serve as a North Star, or the larger nesting doll within which the SMART (Specific, Measurable, Achievable, Relevant, and Time-bound) goals function.

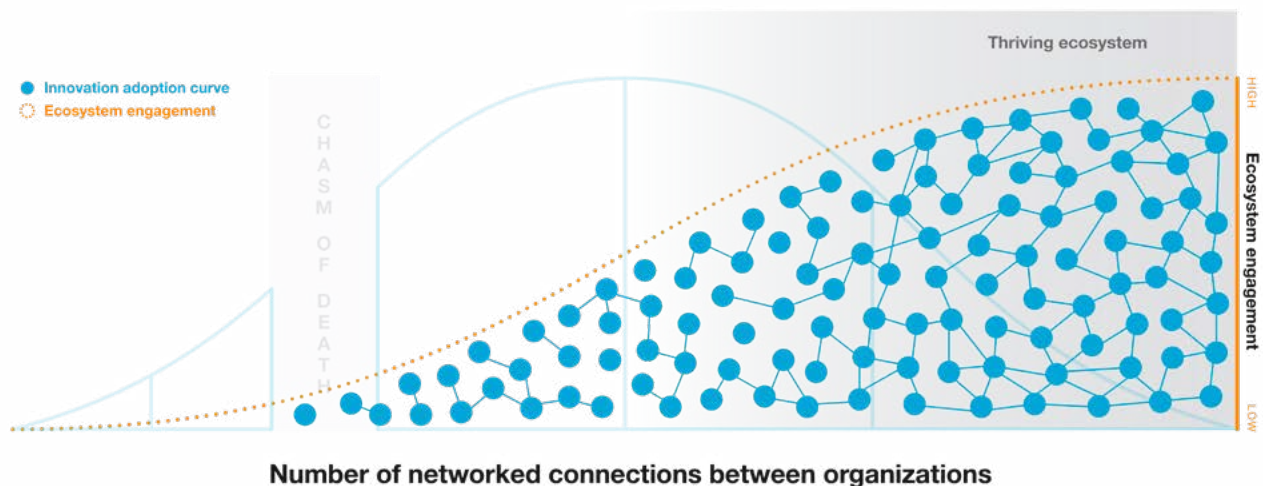
The interplay between these two types of goals is crucial to recognize because it's important to have dreams to aim towards and measurable objectives to achieve along the way. SMART Goals alone are often too short-sighted and limited in scope to change an ecosystem, and overarching goals can be so long-range and fuzzy that they do not offer much benefit in day-to-day operations.

Given that the primary goal is to foster greater Network and Cultural Capital, metrics collected should reflect the degree and quality of collaboration, cooperation, and cohesiveness in the ecosystem. These metrics, tracked over time, will provide a comprehensive picture of the initiative's effectiveness. It's important to remember, though, that building a collaborative ecosystem is a process, and significant changes might not be immediately apparent. Therefore, it's crucial to take a long-term view when evaluating success.

Based on the work throughout the Planning Phase, it's recommended the Governing Board, staff, and funders consider using the following goals to measure the success of the Innovation Hub.

GRAPH 4.1

## Relationship between number of connections between organizations and success of Innovation Hub ecosystem and its entrepreneurs



## OVERARCHING GOALS

1. Build a thriving ecosystem by changing business as usual
2. Transform the story the region tells itself to “We are a thriving community of innovators”

## SMART GOALS

**Running a Baseline and Annual Ecosystem Sentiment Assessment:** To understand if the Innovation Hub program and the ecosystem as a whole are healthy and improving, the Hub will create and conduct an annual ecosystem assessment to assess efficacy and the sentiment of all partners. The assessment should incorporate qualitative feedback from entrepreneurs, business owners, and ESOs alongside a quantitative analysis of regional economic conditions.

**Joint Initiatives:** This would measure the number of programs, projects, or services developed and implemented collaboratively by two or more ESOs.

**Shared Resources:** Track the number of instances where organizations share resources like meeting spaces, tools, guest speakers, etc.

**Cross-Organization Referrals:** Count how often ESOs refer entrepreneurs to other organizations for services that better meet their needs. This collaboration demonstrates an awareness and respect for the specialization of different ESOs and places the entrepreneur at the center of ecosystem efforts.

**Participation in Collaborative Events:** Measure the attendance and frequency of the regular meetings organized by the Ecosystem Steward. High participation would indicate strong engagement and commitment to collaboration.

**Improved Service Coverage:** Analyze whether there are fewer gaps in services provided to entrepreneurs as a result of the collaboration. For instance, survey entrepreneurs on whether their needs are being met more comprehensively.

**Increased Funding or Resource Acquisition:** Monitor if the collaborative efforts result in increased grant funding or resources that are attributable to the joint efforts.

**Success Stories:** Documentation of cases where collaboration directly led to entrepreneurial success can be powerful qualitative evidence of the project’s impact.

**Successful Sunset of Program:** After five years, ecosystem partners will collectively evaluate the initiative’s progress. If the ecosystem is thriving, strong network ties have developed, and entrepreneurial culture has been successfully cultivated in the region, the Hub and its supporting Staff will phase out operations, leaving the existing and any new ESOs to collaboratively manage the ecosystem going forward.





---

# Appendix A: Funding Opportunities

# Appendix A: Funding Opportunities

The following funding opportunities are a mix of emerging and existing grant programs, along with possible local funding sources identified through the planning process.

## BUSINESS OREGON INNOVATION HUB ROUND TWO FUNDING

As a part of the Business Oregon Innovation Hub initiative and an extension of the planning grant that funded this work, Business Oregon will make funds available to advance Innovation Hub Plans that meet their requirements. Business Oregon plans to announce the specifics of this opportunity sometime in November 2023.

- **Type:** One-time grant funding
- **Application window:** Anticipated mid-December 2023
- **Total budget for awards:** To be determined
- **Award size:** To be determined
- **Match:** To be determined.
- **Competitiveness:** Highly competitive between 11 Economic Development Districts
- **Period of performance:** Anticipated 18 months

## EDA BUILD TO SCALE

An annual grant program run by the Economic Development Administration's Office of Innovation and Entrepreneurship, this funding opportunity is poised to support nascent through established ecosystems looking to cultivate potentially scalable and technology-based companies. The program has three award levels (Ignite, Build, & Scale) that allow regions to grow their ecosystems and support offerings over the course of multiple years. NOTE: this grant does not fund the development of any physical infrastructure or workforce training.

- **Type:** Annual grant opportunity
- **Application window:** varies by year; the NOFO is typically released in the spring and communities have a 60 day window to submit their application
- **Total budget for awards:** \$50 million in 2023
- **Award size:** Ignite - \$600,000; Build - \$1,500,000; Scale - \$4,000,000
- **Match:** 1:1 (ex. A \$600,000 Ignite grant requires \$300,000 of local match to secure \$300,000 from EDA)
- **Competitiveness:** Highly competitive - nationwide competition
- **Period of performance:** Ignite - 18-24 months; Build & Scale - 36 months

## EDA PUBLIC WORKS AND ECONOMIC ADJUSTMENT ASSISTANCE GRANT

This annual grant program run by each of the Economic Development Administration's regional offices (Seattle office) for economically distressed communities and regions. It is the EDA's most flexible program; it provides a wide range of technical, planning, and public works and infrastructure assistance in regions experiencing adverse economic changes that may occur suddenly or over time. This program can assist state and local entities in responding to a wide range of economic challenges through: (1) Strategy Grants to support the development, updating or refinement of a Comprehensive Economic Development Strategy (CEDS) and (2) Implementation Grants to support the execution of activities identified in a CEDS (or equivalent), such as infrastructure improvements, including site acquisition, site preparation, construction, rehabilitation and equipping of facilities. Specific activities may be funded as separate investments or as multiple elements of a single investment. As "One Rogue Valley" is included in Southern Oregon's CEDS document, some Hub activities should be eligible within program's parameters. This opportunity is wide-ranging in the activities it funds, but is especially looking for opportunities to grow existing industries and new companies that tie to job creation and retention.

- **Type:** Annual grant opportunity
- **Application window:** rolling until funds are expended
- **Total budget for awards:** \$50 million in 2023
- **Award size:** \$150,000 - \$2,500,000
- **Match:** varies in accordance with applicant region's economic distress
- **Competitiveness:** Competitive
- **Period of performance:** To be determined

## SORED I STRATEGIC FUND

SORED I manages a fund for high impact strategic projects and programs. These funds have minimal restrictions. Use for implementing an Innovation Hub would be contingent on other regional partners' contributions.

- **Type:** Informal (non grant)
- **Application window:** Not applicable
- **Total budget for awards:** Not applicable
- **Award size:** Not applicable
- **Match:** Not applicable
- **Competitiveness:** Non competitive, but limited funding for high priority projects
- **Period of performance:** Not applicable

## SOUTHERN OREGON UNIVERSITY

Southern Oregon University has a strong interest in the implementation of the Innovation Hub and has multiple funding avenues available. Access to funds will be contingent on the details of this plan's adoption and commitments from other regional partners.

- **Type:** Informal (non grant)
- **Application window:** Not applicable
- **Total budget for awards:** Not applicable
- **Award size:** Not applicable
- **Match:** Not applicable
- **Competitiveness:** Non competitive, but limited funding for high priority projects
- **Period of performance:** Not applicable

## USDA RISE

The US Department of Agriculture's Rural Innovation Stronger Economy (RISE) grant program offers grant assistance to create and augment high-wage jobs, accelerate the formation of new businesses, support industry clusters and maximize the use of local productive assets in eligible low-income rural areas. Medford's metro status may exclude this grant from region-wide development efforts. Some of the more rural communities in Jackson and Josephine County may be eligible, but a conversation with a regional USDA representative would be key.

- **Type:** Annual grant
- **Application window:** Varies, but typically spring
- **Total budget for awards:** \$2 million in 2023
- **Award size:** \$500,000 - \$2,000,000
- **Match:** minimum 20% of project cost
- **Competitiveness:** Extremely competitive - nationwide competition with only enough funding for one to four grants annually
- **Period of performance:** 4 years





---

## **Appendix B: Reduced Scope Innovation Hubs**

## Appendix B: Reduced Scope Innovation Hubs

The following models offer optional strategies for focusing on the core work of a regional innovation hub should full funding levels not be secured. Partial funding may still derive from local partners, external grants, or a combination thereof, and the included budget figures are estimates intended for planning purposes only. These alternative strategies demonstrate how the critical work identified in this plan can still move forward with limited financial capital and staff capacity.

### OPTION 1: INNOVATION HUB WITH REDUCED BUDGET

The primary difference for an Innovation Hub with a reduced budget is that the Ecosystem Steward would be the sole staff for the program, reducing the range of executable programming. This, in turn, reduces programming revenue. The initiative would still run for the full five years, prioritizing the programming identified in the Services & Initiatives section under the Ecosystem Support Engine (pages 14-17). The other programming described in the Services & Initiatives section would need to be assessed for priority by a combination of the Steering Committee, Governance Board, Staff, and the five-year work plan.

Under this scenario, the Innovation Hub's activities will be reduced, yet highly impactful. It's also important to recognize the speed of success will be slower than in the fully funded scenario described through the full plan. This approach offers an attainable way to initiate the Innovation Hub concept and begin fostering a more cohesive entrepreneurial ecosystem in Southern Oregon until the region secures additional funding.

	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
<b>INCOME SOURCES</b>					
Local Partner Contributions	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Grant Funding	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000
Program Revenue	\$4,000	\$8,000	\$15,000	\$15,000	\$15,000
<b>Total Income</b>	<b>\$129,000</b>	<b>\$133,000</b>	<b>\$140,000</b>	<b>\$140,000</b>	<b>\$140,000</b>
<b>EXPENSES</b>					
Administrative Partner	\$6,250	\$6,250	\$6,250	\$6,250	\$6,250
Payroll					
Steward	\$80,000	\$82,400	\$84,872	\$87,418	\$90,041
Benefits	\$24,000	\$24,720	\$25,462	\$26,225	\$27,012
<b>Payroll total</b>	<b>\$104,000</b>	<b>\$107,120</b>	<b>\$110,334</b>	<b>\$113,644</b>	<b>\$117,053</b>
Equipment	\$1,500	\$200	\$200	\$200	\$200
Software Subscriptions	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500
Travel	\$1,500	\$4,000	\$4,000	\$4,000	\$4,000
Programming	\$8,250	\$7,930	\$11,716	\$8,406	\$4,997
<b>Total Expenses</b>	<b>\$129,000</b>	<b>\$133,000</b>	<b>\$140,000</b>	<b>\$140,000</b>	<b>\$140,000</b>
<b>Net</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

## OPTION 2: INNOVATION HUB WITH SIGNIFICANT FUNDING LIMITATIONS

The work described throughout this plan focuses primarily on advancing Network and Cultural Capitals, as explained in the Background section (page 6). However, in the event minimal funding is secured for this work, important and impactful transformation can still be assured for the Rogue Valley entrepreneurship ecosystem. In this scenario, regional partners will operate as a hub without starting a formal program with staff.

This scenario would focus on four key aspects of the Innovation Hub Plan described in the Services & Initiatives section (page 14), with activities chosen depending on partners' availability and the collective staff time they can allocate. The key initiatives to focus on will be as follows in order of priority based on impact:

1. Facilitate regular ESO Meetings
2. 360 Review of Ecosystem
3. Build and Manage a Hub Platform
4. Innovation Expo

This approach would be managed strictly by donated staff time from engaged partners as an ad hoc "Board." To remain true to the theme of regional collaboration and to avoid burdening a single organization, Hub partners should consider a rotating facilitation scheme in which different partners alternate in managing monthly meetings. While more resembling program management than ecosystem tending, this approach offers a viable solution given a scenario with significant funding constraints.

To formalize this arrangement, an MOU or agreement detailing each partner's contributions would be necessary. Tracking early wins would bolster the ecosystem's appeal for future funding applications to expand to the model described through the majority of this plan. However, the impact of the programming and the speed of success will be greatly reduced compared to the full and reduced funding models. Despite these limitations, this approach offers a practical way to initiate the essence and intent of the Innovation Hub concept and begin fostering a more cohesive entrepreneurial ecosystem in Southern Oregon.

	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
<b>INCOME SOURCES</b>					
Local Partner Contributions	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000
Grant Funding	\$0	\$0	\$0	\$0	\$0
Program Revenue	\$4,000	\$8,000	\$15,000	\$15,000	\$15,000
<b>Total Income</b>	<b>\$29,000</b>	<b>\$33,000</b>	<b>\$40,000</b>	<b>\$40,000</b>	<b>\$40,000</b>
<b>EXPENSES</b>					
Administrative Partner	\$1,250	\$1,250	\$1,250	\$1,250	\$1,250
Software Subscriptions	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500
Programming	\$20,250	\$24,250	\$31,250	\$31,250	\$31,250
<b>Total Expenses</b>	<b>\$29,000</b>	<b>\$33,000</b>	<b>\$40,000</b>	<b>\$40,000</b>	<b>\$40,000</b>
<b>Net</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>



---

# Appendix C: Acknowledgments



# Appendix C: Acknowledgments

We want to extend our sincere gratitude to the community leaders, business owners, and entrepreneurs who shared their valuable insights and perspectives on the current state of the regional economy, ecosystem and visions for a meaningful Regional Innovation Hub.

Additionally, we would also like to thank the representatives of the economic development ecosystem organizations supporting the region's entrepreneurs and innovators who provided data and information on your existing efforts and initiatives.

Together, your contributions helped to create a unique and impactful Innovation Hub Model to accelerate and uplift the Southern Oregon economic landscape and quality of life for its residents.

## HUB GROUP

### ENTREPRENEURS

**Abigail Schilling** - Medford Coworking Collective

**Jim Teece** - Project A

### ENTREPRENEUR SUPPORT ORGANIZATIONS

**Cat Bonney** - Common Connections

**Colleen Padilla** - SOREDI

**Dave Tribbett** - SORIN

**Josie Molloy** - Grants Pass & Josephine County Chamber of Commerce

**Amy Browne** - SOREDI

**Marshall Doak** - SOU SBDC

**Marta Tarantsey** - Business Oregon

**Ruth Swain** - RCC SBDC

**Tyler Worthley** - Rogue Workforce Partnership

### EDUCATION

**Kim Freeze** - Rogue Community College

**Tanee Brown** - Crater Works

**Vincent Smith** - Southern Oregon University

## ONE ON ONE INTERVIEWS, SURVEY RESPONDENTS, AND FOCUS GROUP PARTICIPANTS

Ali Tarraf	Christian Schwindle	Erik Palmer	Lisa Baehr	Sasha Edwards
Alli French	Cooper Whitman	Grant Innis	Lisa Frank	Seth Kaplan
Amy Browne	Dana Pearce	Helga Motley	Mary Fitzsimmons	Stacey Nimmo
Anna Sherman	Daniel Henderson	Jay Golden	Megan Pugh	Steve Vincent
Anna Wiley	Daniel Scotton	Jeanne Stallman	Michael Smith	Terrill Roper
Annie Jenkins	Daniel Wells	Jeff Sharpe	Mitch Naumann	Thor Muller
Ashley Cates	Darby Ayers-Flood	Jeremy Curtis	Naomi Dabbracci	Tracey Thompson
Anthony Boyde	Dave Dotterer	Joan Robertson-Geisler	Papa Fal	Trevor Yarrish
Bill Thorndike	David Hand	Joel Daniels	Pamela Ryan	Wenda Puzzo
Bret Anderson	EJ McManus	John Williams	Precious Yamaguchi	
Carolina Livi	Eli Matthews	Julie Niles-Fry	Roslyn Donald	
Carr Biggerstaff	Eric Sole	Kari May	Sandra Barber	
Caryne Mount	Eric Herron	Lindsay B. Jones	Sandra Slattery	



---

## **Appendix D: Additional Programming Opportunities**

# Appendix D: Additional Programming Opportunities

Throughout the planning efforts many relevant and impactful Innovation Hub programming opportunities were identified that were not included as priority programming within the business plan. They are listed here as a menu of options for review by the Steering Committee, Governance Board, and Staff when assessing the five year work plan and any unanticipated additional capacity, resources and opportunities.

## LEGEND:

**Ecosystem**

**Hub & Ecosystem**

**Complexity:** ●●●○

**Funding:** ●●●○

- └ **Ecosystem or Hub & Ecosystem** indicates what aspect the impact of the project mostly effects.
- └ **Complexity** is a rough mix of logistics and political feasibility.
- └ **Funding** is a rough indicator of the cost in making this programming idea happen.

### Aggregate newsletter

**Ecosystem**

**Complexity:** ●●●○ **Funding:** ●○○○○

Launching a weekly (or monthly) at-a-glance periodical highlighting all entrepreneurial events taking place in the region would provide new and existing community members with a go-to resource. Currently, community members must review a number of sources to know what is going on at any given time, if they even know where to look to begin with. Further, a resource like this could provide an opportunity to spread the One Rogue Valley brand and a unified ESO front to the community.

### Leadership training academy for ESO staff

**Ecosystem**

**Complexity:** ●●●○ **Funding:** ●●●○

This leadership academy would be focused cross training ESO staff across silos and upskilling them on emerging trends & technologies. It would give folks from different organizations a chance to understand ecosystem partners better, build lasting relationships with peers, and pave the way for future collaborations.

### E2E meetups

**Ecosystem**

**Complexity:** ●●○○○ **Funding:** ●○○○○

Prior to COVID-19, there was a successful informal Entrepreneur-to-Entrepreneur meetup. This is something many interviewees indicated they would like to restart. It could be based on the previous structure or focused on a particular industry, skill, stage, or location.

### Education/workshops in schools

Ecosystem

Complexity: ●●○○○ Funding: ●●○○○

Run workshops, or even just talk to K-12 about the building blocks of entrepreneurship. This is the long game to build the pipeline of future innovators.

### Local version of upwork

Hub &amp; Ecosystem

Complexity: ●●●●● Funding: ●●●●●

A database of specialized gig work and entrepreneurs to connect for one off or repeated projects.

### Risk capital educational classes for investors and entrepreneurs

Hub &amp; Ecosystem

Complexity: ●●●○○ Funding: ●●○○○

Run classes for interested local investors to understand the nuances of investing in start ups.

### Fee for service hackathons for client businesses

Hub &amp; Ecosystem

Complexity: ●●●○○ Funding: ●●○○○

Offer organizing, marketing, and facilitating hackathons/innovation jams to specific businesses on a fee for service basis. This helps existing business owners, expands the region's interconnectedness, and teaches collaborative problem solving to participants.

### Innovation residency

Hub &amp; Ecosystem

Complexity: ●●●●● Funding: ●●●●○

Like an artist residency, but for hosting innovators working on their projects. This helps cross pollination and connections to other regions and as well as marketing the quality of life in the region to the residents' networks.

### Reverse trade show

Hub &amp; Ecosystem

Complexity: ●●●●○ Funding: ●●●○○

Instead of vendors selling their product and services, booth holders would share their challenges and opportunities to attendees who would help solve challenges.

### Ecosystem and entrepreneur podcast

Hub &amp; Ecosystem

Complexity: ●●○○○ Funding: ●●○○○

Create, manage, and host a podcast to share stories of entrepreneurs.



## Manage an investment fund

Hub & Ecosystem

Complexity: ●●●●● Funding: ●●●●○

Create and manage a fund for startups. This could operate in a wide range of ways, and it's key to identify what types of startups should be funded and by what mechanism the deals should take place.

## One stop (shared office for partners)

Hub & Ecosystem

Complexity: ●●●●● Funding: ●●●●●

Physically locating key ESOs in the same location, and key entrepreneurs in the same location to facilitate cross pollination.

## Failfest

Hub & Ecosystem

Complexity: ●○○○○ Funding: ●○○○○

Events, sessions, podcasts, or other group format to share, dissect and celebrate failed ideas and businesses. These are specifically to help reduce the risk aversion and build a supportive environment between entrepreneurs.

## PR for interesting projects coming out of region

Hub & Ecosystem

Complexity: ●●●○○ Funding: ●●●○○

Managing the storytelling of the region's innovation and entrepreneurship to the local and external audience to help change perception of the region by highlighting stories that are not currently receiving an audience.

## Youth inspiration and support

Hub & Ecosystem

Complexity: ●●○○○ Funding: ●○○○○

Engage young minds in innovation and entrepreneurship activities, workshops, or even guest talks at schools to build a pipeline of future entrepreneurs.

## Storytelling events

Hub & Ecosystem

Complexity: ●●○○○ Funding: ●●○○○

Similar to pub talks, but styled like The Moth where multiple story tellers take the stage for short 1st person emotional stories around relevant topics.

### Peer-to-peer cohorts

Hub & Ecosystem

**Complexity:** ●●●○○ **Funding:** ●●○○○

Facilitated, topic specific sprints that mix education, application, and tools for mutual support between entrepreneurs. Topics determined by needs identified by entrepreneurs and facilitated by an ESO or entrepreneur with the skill.

### Innovation fund

Hub & Ecosystem

**Complexity:** ●●●●● **Funding:** ●●●○○

This fund would fit for ideas and businesses that do not fit traditional lending, and aren't yet ready for Risk Capital. It would likely lend small amounts of capital to help provide breathing room for pre-early stage startups, especially those that may not be able to raise from friends and family.

### Data access/repository

Hub & Ecosystem

**Complexity:** ●●●●○ **Funding:** ●●●○○

Entrepreneurs and industry need access to data on markets and trends. However, access to quality data can be expensive. Aligning on what data ESOs have access to and how entrepreneurs should secure assistance to gather that data would create a valuable resource in the region. Furthermore, it could reduce redundancies and costs for ESOs, if multiple organizations currently subscribe to the same or similar datasets.

### Angel Network reboot

Hub & Ecosystem

**Complexity:** ●●●●○ **Funding:** ●●●○○

Rebuild/restart the Southern Oregon Angel Conference, which invested nearly \$1.2M in businesses from 2011-2016. Data indicates that nearly 6,000 households may have the potential to become accredited angel investors in Josephine and Jackson counties. If just 5% of potentially eligible households invested \$5,000 in a local company, that would equate to nearly \$1.5M new dollars invested in the region.

### Community "resource team"

Hub & Ecosystem

**Complexity:** ●●●●○ **Funding:** ●●○○○

Create a collective of ESOs, entrepreneurs, and service providers who meet regularly to help regional entrepreneurs solve specific challenges they face. This could occur anonymously with an ESO bringing forth a challenge a client is facing to the group without identifying the individual, or it could involve the entrepreneur attending in-person or virtually to present their business (or idea) and challenge to the group. Ideally, ESOs would prescreen entrepreneurs and the support they need beforehand to make the best use of everyone's time.

### Joint coworking access

Hub & Ecosystem

Complexity: ●●●●○ Funding: ●●○○○

Facilitate and manage a “one membership” type plan that allows users to use any of the existing coworking offices in the region.

### Cooperative grant management

Hub & Ecosystem

Complexity: ●●●●○ Funding: ●●○○○

Search, research, write and manage cooperative grants for regional partners.

### Innovation jams/hackathons

Hub & Ecosystem

Complexity: ●●●○○ Funding: ●●○○○

Open invite activities that both teach participants collaborative problem solving while helping solve local challenges.

### Investors group

Hub & Ecosystem

Complexity: ●●●○○ Funding: ●○○○○

Similar to an Angels group and the E2E, but more broad and open access for investors of all types to network, and learn about investing in entrepreneurs.

### Emissary/ambassador program for external events and ecosystems

Hub & Ecosystem

Complexity: ●●●○○ Funding: ●●●○○

A program, and fund, for supporting either entrepreneurs or ESO staff to attend conferences, workshops, and other events specifically with the intent of building stronger connections with other innovation communities.

### Coworking spaces

Hub & Ecosystem

Complexity: ●●●●○ Funding: ●●●○○

Open and manage a coworking office specifically for early stage and expanding businesses.



Amplifying the work of civic changemakers.

[www.civicpossible.com](http://www.civicpossible.com)

PROJECT LEAD

**Jason Schneider**

PROJECT ASSOCIATES

**Rachel Barra, Jomiro Eming**