

**Partial Progress Report @ 3.31.23**

*Covering October 1, 2022 - March 31, 2023*

Key Activities:

- ✓ **Managed final two Southern Oregon Business Conference industry focused networking events.** Included as a series of events April – October of 2022, these were “Moving Forward with Change” 90-minute networking gatherings at various locations throughout the region. October’s events were focused on the hospitality sector and included a stop at Pallet Wine in Medford and the Tap Rock Restaurant in Grants Pass. The featured business, including videography, was Thomason Hospitality Group which owns various restaurants in the region. The attendance was smaller than hoped but averaged 25 guests. Staff created a survey following the full series and participants noted the smaller events provide meaningful networking opportunities and with some modifications would like to see similar events in the future.
- ✓ **Coordinated and served as fiscal manager and lead agency for Regional Innovation Hub planning grant.** Several regions in the state received this grant to explore the idea of developing a physical innovation hub. A steering committee of pertinent innovation partners, such as co-working spaces, technology companies, both local SBDC’s, Rogue Community College, Southern Oregon University, and others, was formed to guide the process and hire a consultant. The consultant selected, Civic Possible, is finalizing the final report. Numerous interviews and weekly discussions were coordinated. The final report, nearly complete, is due in November 2023 and the steering committee will explore next steps for potential funding/grant requests to implement key strategies identified. The likely focus based on work to date will be on better coordination, collaboration, and functionality of the existing ecosystem, rather than creation of a new entity or physical space.
- ✓ **Managed Business Development Revolving Loan Funds.** We continue to respond to various inquiries about gap financing and make regular referrals to both SBDC’s for business plan services. In February, the loan manager accepted a position elsewhere and we utilized existing staff to triage incoming requests and sought assistance from partner banks and loan committee members while searching for a suitable new loan manager. As of March 31, the position had not yet been filled.
- ✓ **Expanded quarterly meetings with Chamber of Commerce directors, to include Rogue Workforce Partnership and County leadership.** Renamed Regional Economic Vitality (REV) Chats, the meetings are now held bi-monthly at SOREDI. The purpose to assure coordinated services, cross market business events, inform one another of key business activities, and help one another as needed. Initial conversations revolved around advocacy and information sharing respective to the wildfire disasters of 2020; more recent conversations have been forming around a collective One Rogue Valley Business Conference (previously a SOREDI event) to be collectively owned. Prospective first date, with share management is tentatively planned for late April 2024.
- ✓ **Coordinated two industry tours, November 17 and February 25 – following its re-start in September 2022 after a long hiatus.** The tours are sponsored by Rogue Workforce Partnership and the Southern Oregon Educational District. Sponsorship support provides complimentary attendance for educators allowing them to connect on the job skills with future workforce needs and align curriculum accordingly. The November tour included visits to one-of-a-kind traded-sector companies in the South Valley of our region: Cummins, Harry & David and Scharffenberger Chocolate. Southern Oregon University sponsored our transportation providing use of their Raiders athletic bus. In

February, the group visited a different set of manufacturers in Southern Oregon Sanitation, Oregon Swiss Precisions, Playcraft and Katanacraft. Josephine County provided complimentary public transit transportation.

- ✓ **Participated with the Town of Butte Falls in two monthly Forest Chats, relative to their Community Forest Initiative.** Butte Falls is a former mill town of less than 500 citizens (the region's smallest jurisdiction) and recently acquired 400 acres of forest lands surrounding their town. The Forest Chats serve to educate citizens, partners, and agencies in their planned efforts to increase fire resiliency, enhance sustainable forest practices, develop a managed community garden to educate and provide economic benefit for the town, and develop a recreational plan to attract visitors to the area to increase the town's economic vitality. Attention to this small community is highly important as it is within a significant watershed for the majority of our region, producing 26.3 million gallons of water daily.
- ✓ **Facilitated two Butte Falls Business Community economic vitality meetings.** This group includes the mayor and 5-8 small businesses who are working to update their discovery tours, create business signage near the water falls to attract visitors to the town, and develop promotional materials for visitors attending events such as Heritage Day, the 4<sup>th</sup> of July Parade, and other prospective events. These meetings are held monthly.
- ✓ **Participated in key economic development and workforce events within the State to connect with peers, discuss post-pandemic strategies and best practices.** These events include the annual leadership summit for the Oregon Economic Development Association (held in October, North Bend) and the Working Together Conference was coordinated by the Oregon Employment Department and Oregon's workforce investment boards (held in November, Bend).
- ✓ **Attended the Area Development Consultant's Forum in Florida, December 4-6.** Over 20 national site consultants and related professionals attended this 3-day conference to present on current trends in site selection decisions made by national international companies. Topics ranged from taxation, workforce, industrial buildings, particular growth in distribution centers, challenges in supply chain, and more. Over 100 were in attendance.
- ✓ **Created and co-hosted an elected official's mixer and orientation event with the Rogue Valley Council of Governments (RVCOG).** This event, held on January 30, served to appreciate all elected officials, and provide introductory information to newly elected leaders about several regional agencies – including SOREDI, RVCOG, Business Oregon, Rogue Workforce Partnership, and two metropolitan planning organizations. Fourteen of 15 jurisdictions were represented and over 40 attended. Central Point City Hall provided the venue. This event, previously held only following an election year, was highly successful and is now planned to be an annual event.
- ✓ **Hosted complimentary annual breakfast for SOREDI members in February.** This event, previously held annually in June, reflected a change of timing in our annual membership event to better accommodate staff capacity and create differentiation between SOREDI (501c4) and SOREDI Foundation (501c3). This event included breakfast and networking time, annual updates from SOREDI and an industry panel representing the healthcare (Asante), transportation (TP Trucking), and manufacturing (Katanacraft/Blue Earth Marine) industries. Over 100 in attendance.

- ✓ **Completed Enterprise Zone annual filings, in partnership with both county assessors' offices.** SOREDI has served as the enterprise zone manager for 4 different zones in our region since 1989. Annual filings, due by April 1 each year, included conversation and direct assistance to 31 open applicants – a mix of manufacturing, distribution centers, headquarters, and hotels. These 30 companies, all in varying years of their exemption periods, represent 352 new jobs, supporting 832 existing jobs, with total new wages approximately \$17.54 million.
- ✓ **Participated in monthly meetings of the PIER Selection Committee.** This 5-person committee consists of SOREDI, the Jackson County Community Long Term Recovery Group, the cities of Phoenix and Talent, and Jackson County. The group was created following the Labor Day fires of 2020, with strong coordinated advocacy with the State of Oregon in May 2022, to create set aside funds to help businesses impacted by the devastating fires. \$422 million in CDBG-DR funds from Housing and Urban Development were allocated to the Oregon Housing and Community Services department to seven Oregon counties. Following our advocacy, 10% was set aside for Planning, Infrastructure, and Economic Revitalization (PIER) – specific to business community needs. The selection committee received final rules from OHCS in March and is now reviewing and planning to open up application processes in mid-late summer. Jackson County's portion for PIER is \$13.8 million.
- ✓ **Served on multiple community and regional collaborative economic development committees, roundtables, and initiatives.** These include serving as a lead organization partner in the Medford 2040 Vision Committee, Medford Unites (Medford 549c School District), the Ashland Economic Roundtable and University District Committee, and several distinct short-term assignments relative to the Bear Creek Greenway.
- ✓ **Continued response to various local expansion projects and new company inquiries.** Several new groundbreakings/openings expected this summer – manufacturing (3), hotels (3), distribution centers (2).
- ✓ **Traveled to Seattle to participate in the EDA/NADO Economic Roundtable on March 23-24.**

Constraints and Challenges:

Staffing continues to be of key concern as inflation continues and wages tick up. This makes it highly difficult to offer competitive wages and compensation packages, particularly given SOREDI is a non-profit. Over 50% of its operating revenues are derived from jurisdictional and private sector membership.

Staffing Updates:

- Business Support Coordinator hired in October 2022, filling previously vacant position.
- The Loan Manager resigned in February 2023. Still actively searching for a suitable replacement.
- The Disaster Liaison position, supported by an EDA Technical Assistance Grant, ended March 31, 2023. The person in that position moved into a regular business development manager role.
- Current staff of 4. Optimal staff capacity is 6. Budgeting for 5 in our next fiscal year.

Thank you for your continuing support.

Colleen Padilla, Executive Director  
4/30/23



