

Crystal Cox

From: Laura Tschabold
Sent: Friday, September 01, 2017 11:43 AM
To: Stan Primozych; Mary Starrett; Rick Olson
Cc: Ken Huffer; Christian Boenisch; Crystal Cox; Laura Tschabold; Carrie Martin
Subject: Agenda item for Consideration
Attachments: Application Form Draft Version 2.docx

Commissioners – on your agenda for discussion next Tuesday's Informal Session will be the request from Commissioner Primozych to have Mid-Willamette Valley Council of Governments to act as the fiscal agent for the following project:

THE YES COLLABORATIVE: A COMMUNITY-LED, STRATEGIC DOING COLLABORATIVE FOR THE BETTERMENT OF YAMHILL COUNTY

Crystal, please place this item on next Tuesday's agenda.

Thanks, Laura

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Board of Commissioners on
9-7-17 by Board Order
17-356

THE YES COLLABORATIVE: A COMMUNITY-LED, STRATEGIC DOING COLLABORATIVE FOR THE BETTERMENT OF YAMHILL COUNTY

Provide a description of your proposed project or program, including

a. The specific goals, outcomes and measures of success. (Word count 200- Required)

The goal of the YES Collaborative is to develop and embed a collaboration culture throughout Yamhill County's communities so that we can successfully tackle long-term objectives through bite-sized projects. To do so, we must make upfront investments in training, processes, tools, and networks of collaboration necessary to instill the culture, and achieve the successes that engender participation and encourage repeat performances. The program will focus on two measurable outcomes: (1) building an effective and sustainable economic development collaborative, and (2) implementing key actions identified in each of five priority community development areas: Transportation, Workforce and Talent Development, Housing, Infrastructure, and Land Availability/Use. Measurable results will come in the successful completion of community projects undertaken by interconnected workgroups and reported-out in quarterly, countywide summits. Workgroups and projects will fall out of Strategic Doing™ sessions held during the summits (<http://strategicdoing.net/>). Given the collective consensus to date by communities throughout the county, the focus will be on the five economic development areas above. However, the most important use of the grant funds will be to Strategic Doing training and the related creation of networked workgroups, populations and communities so that the Collaborative succeeds and is self-sustaining.

b. Why this project is important for your community, county, region or the State. (Word count 200- Required)

Community development is a team sport. No single agency or organization can provide all the functions that are required to implement a community development strategies. An entire ecosystem of organizations exists around community and economic development including federal agencies (EDA, Dept. of Commerce, SBA), state agencies (Business Oregon), local governments (cities, counties, utilities, council of governments), private sector (businesses), education (school districts, community colleges, universities), and nonprofits (chamber of commerce, business incubators). To be effective, these organizations must work together.

Previous countywide initiatives have not achieved the expected results because communities throughout the county were not engaged in the process. The lessons learned from previous initiatives make it imperative to create a sustainable, interconnected network of community workgroups that have the tools and motivation to tackle long-term development goals in achievable, "bite-sized" projects. Strategic Doing is a methodology for managing complex collaborations where no single individual or organization can tell others what to do. Instilling the Strategic Doing framework in communities across the county, coupled with coordination by the YES Council (comprised of representatives from every community in the county) and process management by the Chehalem Valley Innovation Accelerator (ChehalemVIA), can achieve effective, ongoing community-led economic development in our region.

c. The degree to which it is research and/or evidence-based. (Word count 200- Required)

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Strategic Doing builds from the academic research and literature on organizational development, social psychology, appreciative inquiry, and working in teams. Strategic Doing focuses on clearly articulating desired outcomes, identifying pathways to achieve those outcomes, and developing metrics that empirically measure progress. In November 2016, Yamhill County hosted an economic vitality workshop to address key development areas. Facilitated by ChehalemVIA, about 100 people attended the Yamhill Economic Vitality Summit, self-selected into teams, and identified and prioritized needs for each area. Additionally, the University of Oregon Community Service Center (CSC) introduced the Strategic Doing framework and proposed its use as a community-efficient way to tackle the priorities identified by the teams. At summit's conclusion, the consensus was to move forward with a second workshop using Strategic Doing. In February 2017, ChehalemVIA and CSC facilitated the second economic vitality event. The result was 8 different workgroups tackling projects within each of 5 economic development areas. These workgroups are well-underway with their projects and will report-out and sync-up at the next summit in October 2017. With some representation from all the communities in the county and minimal training in Strategic Doing, we are already gaining momentum and seeing results.

d. State how your project meets the mission of The Ford Family Foundation and the objectives of the specific Ford Family Foundation Program for which you are applying. (Word count 200-Required) (refer to our website for more info)

This project achieves the core mission of TFFF: "Successful Citizens and Vital Rural Communities." It falls within both the *Community Building* and *Economic Vitality* grant programs. The stated goal of the Community Building program is: "Community Building Grants support efforts to increase connections, build capacity and take community-led action" with a focus on "...rural residents and community groups at the center of the process as they build their community's future in an inclusive and comprehensive way." The YES Collaborative, with its underlying Strategic Doing framework, will help Yamhill County achieve TFFF Community Building goals including *Increasing Connections* and *Building Capacity*, which leads to *Community-led Action* and its desired outcomes: *Develop a Vision, Plan and Implement*, and *Align and Stabilize*. Additionally, this project furthers TFFF's goal of *Economic Vitality*: "Help increase the quantity and quality of employment through the retention, attraction and expansion of businesses in rural communities" by "...increasing the capacity of systems throughout the state that aim to support rural community economic development." For example, 3 of the 8 workgroups underway are addressing needs in workforce development.

e. The population that will benefit by race/ethnicity, age, socioeconomic status, and geographic location. (Word count 200- Required)

This project will benefit current and future residents of Yamhill County by interconnecting community-led project teams and building networks of collaboration throughout the county as well as improving the county's economic vitality. Obviously, the only way to accelerate success

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is to take an all-inclusive approach to the YES Collaborative, engaging all populations within the region including:

- Cities and communities, no matter their size
- Youth – especially working to reverse the “brain drain” resulting from Yamhill County youth moving to Portland or other metropolitan areas due to a perceived lack of economic opportunity
- Underserved populations – approximately 50% of the county lives in poverty
- Our growing Latino and indigenous populations
- Gender diversity and equality
- Age diversity – the county has a broad range of age groups including a significant older population (whose contributions can help turn the county into a blue zone).

The funds from this grant will allow large numbers of participants from the above populations and across the county, to learn Strategic Doing and other techniques for effective community building. Three-day Strategic Doing classes will focus on training trainers. One-day classes will accommodate larger numbers of participants in order to scale capacity.

Explain why your organization qualifies to do the work you are proposing, including

a. The people who will lead and carry out the work, and their qualifications. (Word count 200-Required)

Wranglers, coaches and facilitators:

- Robert Parker, AICP: Executive Director, University of Oregon Community Service Center: <https://www.linkedin.com/in/robert-parker-647107b/>
- Megan Smith: Executive Director, Community Service Center (CSC): <https://www.linkedin.com/in/megan-smith-22a5516/>
- Carr Biggerstaff, Director, Chehalem Valley Innovation Accelerator: <https://www.linkedin.com/in/carr-biggerstaff-943203/>

Help with outreach and resource alignment will come from members of ChehalemVIA including Newberg’s Community Development Director, the Chamber of Commerce President, local business leaders, and a Yamhill County Commissioner.

The YES Council will include representatives from the following:

- School Districts, Colleges and Universities: Participation from each school district in the county as well as Portland Community College, Chemeketa Community College, Linfield College, and George Fox University
- The cities of Amity, Dayton, Carlton, Dundee, Lafayette, McMinnville, Newberg, Sheridan, Willamina, Yamhill, and the Confederated Tribes of Grand Ronde.
- Businesses representing the Yamhill County’s key industries including manufacturing, agriculture, timber, food processing, and so on.

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Appendix A in our application lists the participants in the first two summits, many of which are currently engaged in workgroup projects. Appendix B lists a representative sample of municipal, business and community organizations providing Letters of Support for this grant application (the letters are included with the application documents).

b. How this project fits within your organization's strategic plan/business plan. (Word count 200- Required)

ChehalemVIA (<http://chehalemvia.com>) is a community-built-and-supported business accelerator that helps startups and existing businesses leverage technology to succeed in the expanding digital economy. ChehalemVIA opened its doors in August 2016, with facilities, services and equipment donated by local organizations and businesses. The Chehalem Valley Chamber of Commerce, a 501c6 organization, is the interim host, until ChehalemVIA is a standalone 501c3 organization (underway). As a catalyst for business development, ChehalemVIA recognizes first and foremost that it takes building community to accelerate the necessary changes to grow a traded sector economy and works as diligently on community development as it does business development.

CSC (<https://csc.uoregon.edu>) is a research center affiliated with the Department of Planning, Public Policy, and Management at the University of Oregon. It is an interdisciplinary organization that assists Oregon communities by providing planning and technical assistance to help solve local issues and improve the quality of life for Oregon residents. Given CSC's track record, Purdue selected CSC to become the Strategic Doing center of excellence for the west coast. This project is the perfect opportunity to roll out Strategic Doing, first in Yamhill County, then Oregon.

c. What the grant funds will allow you to do differently or more effectively. (Word count 200- Required)

The Ford Family Foundation funds would support the YES Collaborative for two years. After two years, the YES Collaborative will sustain operations through partner contributions, business support, and project-focused grants. The grant is required to ensure that we reach critical mass by making upfront investments in training, processes, and tools while building networks of collaboration. ChehalemVIA is a startup in its own rights with donations from "friends and family" and volunteer staffing. But, to take on the expanded role of wrangling people and processes, additional funds are needed.

Strategic Doing is a powerful community organizer for getting things done, but it is foreign to most people because it is different from the traditional process of creating a strategic plan, only to watch it fail because community volunteers can't "eat the elephant." Strategic Doing acknowledges the "big picture," but leads participants to create achievable projects and work in a rapid 30-day cycle, eating the elephant one bite at a time. The resulting successes motivate participants to stay engaged and encourage their friends and colleagues to join. The grant will

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allow us to embed the Strategic Doing framework in our various communities, and instill a collaboration culture in our diverse populations.

d. The impact this project would have on your organization. (Word count 200- Required)

A secondary outcome of this grant will be to help improve and grow the capacity and capabilities of both ChehalemVIA and CSC, since both will only succeed if they: a) improve their abilities to build collaboratives, and b) perfect their tools and practices. Part of ChehalemVIA's mission is to help develop the workforce/talents needed for success in our expanding digital economy. ChehalemVIA lead multiple community initiatives including: Innovate Yamhill County (<http://innovateyamhillcounty.org>), Entrepreneurship 101, a kick starter for high school students, and the annual Willamette Valley Drone Challenge. This grant will help ChehalemVIA become an experienced practitioner of Strategic Doing, adding to its toolkit.

The CSC has provided service for more than 40 years and is training the next generation of community leaders, especially in rural areas. The CSC has several programs that align with the YES Collaborative such as EDAUC, RARE, OPDR and the Community Planning Workshop (see uploaded grant application for more details). Given CSC's community focus, establishing itself as a Strategic Doing center of excellence can only benefit the communities and populations with which it works.

e. Any other organizations or individuals who are collaborators in this endeavor. (Word count 200- Required)

The YES Core Group, the start of the YES Council, currently advises on the Economic Vitality Summits and includes the following organizations:

- Yamhill County
- City of Amity
- City of Dayton
- City of Dundee
- City of Newberg
- City of Sheridan
- City of Yamhill
- McMinnville Economic Development Partnership
- Mid-Valley Council of Governments
- Oregon Regional Solutions
- Innovate Yamhill County
- SEDCOR
- Rural Development Initiatives
- Chehalem Valley Innovation Accelerator
- University of Oregon Community Service Center

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Additionally, Appendix A in the grant application (uploaded with the other documents) contains a list of all organizations attending the first two summits, many of which are engaged in Strategic Doing workgroups and projects.

Add additional information about your organization or project that you feel is pertinent to this application. (Word count 100- optional)

Please see the YES Collaborative grant proposal in the uploaded documents.

Project Budget & Timelines

Describe the finances and budget for the proposed work

a. How the grant funds will be used. (Word count 100- required)

ChehalemVIA, CSC, and the YES Council, will guide the YES Collaborative and provide resources for success. The program will focus on three measurable outcomes: 1) the training and coaching necessary to spread the Strategic Doing framework and related best practices such as Agile Learning to the broadest range of participants, countywide, 2) developing a coalition of connected workgroups throughout the county that rely on Strategic Doing to help manage projects, processes and outcomes, and 3) organize and produce quarterly summits that keep building on the network of workgroups by celebrating successes and sharing outcomes as well as seeking peer-to-peer help.

b. Timeline of when funds are needed. (Word count 100- required)

TFFF grant funds are need as soon as possible, or at least a commitment. Both the CSC and ChehalemVIA are committed to moving forward. ChehalemVIA is currently supporting the existing 8 workgroups and making preparation for the next summit in October 2017. But our funds are limited. More importantly, CSC needs to start providing Strategic Doing training: the 3-day train-the-trainer classes and the 1-day community classes. Affirmation of the grant will at least allow both CSC and ChehalemVIA to cope with the cost of facilities, instructors, materials, etc.

c. Evidence of community support for and engagement in the program or organization. (Word count 100- required)

Please see the YES Collaborative grant proposal in the uploaded documents, Appendices A and B, and the related Letters of Support.

d. Other funders. (Word count 100- required) _____

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ChehalemVIA is a community-led and supported business accelerator and has received in-kind donations as well as citizen donations and a small grant from Yamhill County. Please see the Funding Status Report, uploaded with the other required documents. CSC is funded by the University of Oregon and grants.

e. The plan for sustainability of the project or program. (Word count 100- required)

TFFF will support the YES Collaborative for two years. After two years, the Collaborative will sustain operations through partner contributions, business support, and project-focused grants. Combining ChehalemVIA with Purdue's Strategic Doing framework, provided and supported by CSC, will enable a sustainable framework for undertaking community-led projects for the long-term.

Total Project Budget 80,000 (Format amount without \$ and decimal. (Example: 000,000))

Request Amount 80,000 (Format amount without \$ and decimal. (Example: 000,000))

Percentage of this Request to the Total Project Budget 65% Provide the percentage of the total project budget you are requesting from The Ford Family Foundation. Format percentage as a whole number and use the percent sign. (Example: If your Total Project Budget is \$8,000 and your Request Amount is \$2,000; enter 25%)

Phases & Timelines

Is this a phase or a piece of a larger project? If so, briefly describe the full project & indicate which phase this request is for. (Word count 100- required)

This project is phase 2: the formalization and expansion of the grassroots efforts taken to date by the county, CSC, ChehalemVIA, and the core group to create a sustainable community collaborative that standardizes on a common framework, Strategic Doing. Started 10 months ago, successes to date indicate that committing the right resources at this stage will ensure continued, broader success for the future. In phase 2, with appropriate funding and resources, we are confident we can establish a sustainable YES Collaborative.

Project Start Date: September 2017. (Select a date)

Project End Date: August 2019 (Select a date)

Date Funds Needed: September 2017 if possible. (Provide the latest date you anticipate funds would be needed for this project.)

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SEPARATE DOCUMENTS TO BE INCLUDED

Board of Directors: Include in your document the names, contact information, professions, and gender for all Board of Directors. (Required)

IRS Determination Letter (Required)

Budget Form: Complete this document using the form entitled "Budget Form" located in our online Toolkit. Submit this document in Excel format only. (Required)

Funding Status Report: This is a report which shows your project/program fund raising status. Complete this document using the form entitled "Funding Status Report" located in our online Toolkit. Submit this document in Excel format only. (Required)

Financial Statements: Include a Statement of Financial Position (Balance Sheet) and Statement of Activities (Income Statement) for the past two fiscal years. (Required)

Other - Optional: Include additional document(s) pertinent to this application. Do not exceed more than three (3) additional documents. Each document should not exceed more than five (5) pages. We do not require Letters of Recommendation.

1. Budget, Project Schedule, Appendix A and B (below – 1 document)
2. Letter of support (2 documents)

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DOCUMENT 1: BUDGET, PROJECT SCHEDULE & APPENDICES A & B

Table 1 provides a generalized budget for the project. Table 2 provides a generalized schedule for the project.

Table 1. Proposed Project Budget

Task	Cost
1. Develop Collaboration Framework	\$15,000
2. Strategic Doing Training	\$15,000
3. Support Strategic Doing Process	\$30,000
4. Strategic Doing Summits (4)	\$20,000
Total	\$80,000

Table 2. Proposed Project Schedule

Task
1. Develop Collaboration Framework
a. Reach out to every community and recruit representatives for the YES Council
b. Announce YES Collaborative and introduce the YES Council at the next work group summit (the first of 4 summits, every 6 months)
c. Establish 30/30 communications framework to support work groups in the 5 economic development areas
d. Conduct 30/30 reviews with the multiple work group teams on an ongoing basis
2. Strategic Doing Training
a. Conduct 3 day sessions with certification for key leaders/guides in the collaborative (i.e. YES Council members, development area stakeholders, and community members committed to long-term roles in the collaborative)
b. Conduct 1 day sessions for work group leaders/guides as needed
c. Provide Strategic Doing materials such as the Strategic Doing Pack and Strategic Doing Maps
d. Onboard new work groups with the Strategic Doing Table Guide/Knowledge Keeper training at summits and as needed
3. Support Strategic Doing Process
a. Provide ongoing coaching in Strategic Doing methods and techniques for the various workgroups
b. Align related economic vitality projects, programs and initiatives around the county with the YES Collaborative (and network of Strategic Doing work groups)
4. Strategic Doing Summits (4)
a. Schedule, plan and produce Economic Vitality Summits every 6 months that bring together the various work groups in the 5 economic vitality development areas

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APPENDIX A: ECONOMIC VITALITY SUMMIT PARTICIPANTS

One or more representatives attended the November 2016 and February 2017 Yamhill County Economic Vitality Summits from the following organizations:

- A-dec, In
- Aero Lock & Safe, Inc
- A.R.E. Manufacturing, Inc
- Austin Industries
- BiggerstaffVBA
- Chehalem Park and Recreation District
- Chehalem Valley Chamber of Commerce
- Chehalem Valley Innovation Accelerator
- Chemeketa Community College-Yamhill Valley Campus
- Chemeketa Small Business Development Center
- City of Carlton
- City of Dayton
- City of Dundee
- City of Lafayette
- City of McMinnville
- City of Newberg
- City of Sheridan
- City of Willamina
- City of Yamhill
- Delphian School
- Domaine Drouhin Oregon
- Express Employment Professionals
- First Federal Savings & Loan
- Friendsview Retirement Community
- HDR Engineering
- Hope on the Hill
- Housing Authority of Yamhill County
- Incite, Inc.
- Innovate Oregon
- JB Landscape & Maintenance Services LLC
- Konect Aviation Oregon, LLC
- Lewis Audio Video
- McMinnville Area Habitat for Humanity
- McMinnville Downtown Association
- McMinnville Economic Development Partnership
- Mid-Valley Regional Solutions Office
- Mid-Willamette Valley Council of Governments
- MJG Development Inc.
- MV Advancements

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- Newberg Downtown Coalition
- Newberg Planning Commission
- Newberg School district
- Northwest Light & Energy
- OnlineNW
- Oregon Dept. of Land Conservation & Development
- Oregon Dept. of Transportation
- OSU Extension Service, Yamhill County
- Planet Fitness
- Portland Community College
- Portland Community College - Newberg Center
- Resource Assistance for Rural Environments
- Rock of Ages/Valley View
- Rural Development Initiatives
- Schaad Orchards LLC
- SEDCOR
- Sheridan Building Materials and Feed/Pacific Fir Lumber Inc.
- The Ford Family FoundationThe Morgan CPS Group
- University of Oregon Community Service Center
- Visit McMinnville
- Willamette Valley Medical Center
- WorkSource Oregon/Resident Care
- WorkSource Yamhill/Oregon Employment Department
- Yamhill Community Action Partnership (YCAP)
- Yamhill County
- Yamhill County Board of Commissioners
- Yamhill-Carlton School District

APPENDIX B: LETTERS OF SUPPORT FROM ECONOMIC VITALITY SUMMIT PARTICIPANTS

Letters of Support from a representative sample of municipal, business and community organizations that participated in the first two Economic Vitality Summits:

- Amity School District – Amity, Oregon
- Austin Industries – Newberg, Oregon
- City of Dayton – Dayton, Oregon
- Dayton School District – Dayton, Oregon
- City of Lafayette – Lafayette, Oregon
- Online Northwest – McMinnville, Oregon
- University of Oregon Community Service Center – Eugene, Oregon
- City of Willamina – Willamina, Oregon
- Willamina School District – Willamina, Oregon
- Willamina Businesses – Willamina, Oregon
- Yamhill-Carlton School District – Yamhill, Oregon