

Oregon -- Central Oregon SBDC

STRATEGIC PLAN

Plan Name	Overall Plan Champion
COCC-SBDC 2021 Work Plan	Ken Betschart

Section 1: Our Compass

Mission Statement

Be Central Oregon's preferred provider of business advice and education to small business owners and entrepreneurs.

PURPOSE - WHY WE EXIST.

Deliver expert business advice and education to help existing and future business owners start, grow and succeed.

MISSION - WHAT WE DO.

- Provide entrepreneurs and small business owners with the knowledge needed to make smart decisions and prosper.
- Offer a suite of services that can enable entrepreneur success.
- Be an outstanding and influential partner within our Central Oregon small business ecosystem.

Values

- Expert Staff with a wide breadth of experience
- Diversity - Serving all industries and ownership types of small businesses community
- Accessible - Geographically and serving all industries
- Relationship centered advising
- Integrity - Our actions match our words

Top Strategic Priorities

- Grow our relevancy through Central Oregon
- Sustainable funding Model
- Focus, Finish and Deliver to drive a culture of accountability

Section 2: Our Actions

Focus Area I: ENHANCING SERVICES

Focus Area Vision:

Improving quality of services with a focus on agility, accessibility, relevance and technology in a sustainable and profitable manner.

Goal A GROW OUR PROGRAM INCOME TO PAY FOR NEW PROGRAMS AND RESOURCES:
 2021/2022 Program Income of \$130k.

Status: On Track

01/01/2021 -
 06/30/2022

Goal Champion:
 Ken Betschart

Goal Key Team Members:
 Jim Wilcox, Jose Balcazar,
 Katharine Condon, and
 Patti Norris

Last status update on Mon, Mar 29, 2021 by Ken Betschart

Action Items

Complete	Details	Due Date	% Complete	Person(s) Responsible
	1 . Create 9 new courses over the 2020 / 2021 & 6 new courses in 2021 / 2022 school year	06/30/2021	40%	Ken Betschart

Notes

- 7 new courses offered for 2020/2021
- Increased frequency of CCB-Spanish online.
- Fall 2021 course roadmap - Start May 1.
 - Learning Pathways option?
 - Look at PCC intake model
 - Look at possible partnership with NI for childcare
 - Can network get in contact with state early childhood division - Action Request to Steve on 5/4
 - Make contact with Steve Cooper
 - what, we do, how we do it, could they be a partnership to teach on their behalf
 - Grant writing to fund tuition
 - SBM for Childcare providers
 - Make Contact with Lisa Woods
 - Potential opportunity to with City of Bend on underwriting the cost of it
 - Succession Planning
 - Look into aging business information
 - Get adviser certified in exit planning: Jun 21-25, 2021
 - Talk to Patti about the opportunity
 - What would I expect?
 - Teach at COCC times a year plus offer to other Centers
 - Potential opportunity to with City of Bend on underwriting the cost of it
- CCB with testing onsite

- Workforce development organization
 - Write a plan on what could workforce development could
 - the problem, opportunity, what would we offer?
 - Read Heather's material

	2 . Grow our instructor pool by 7	12/31/2021	10%	None
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Notes

Dependant on # of course offerings

	3 . Become VA a& State certified for GI Bill benefits & launch to Veterans community	03/31/2021		Katharine Condon
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Notes

No Goal Notes

Goal B LEARNING MANAGEMENT SYSTEM (LMS): Adopt the Network LMS using its centralized content development and class delivery platform.

Status: **Slow Progress**

01/04/2021 -
12/31/2021

Goal Champion:
None

Goal Key Team Members:
None

Last status update on Mon, Mar 29, 2021 by Ken Betschart

Action Items

Complete	Details	Due Date	% Complete	Person(s) Responsible
	1 . Work with network office to create central standardized content for "Idea" and "Launch" course offerings	03/31/2021	20%	Ken Betschart
	Notes 4/30 updated - 'Idea' course put on back burner. Launch course in design. Likely to go live in the fall of 2021.			
	2 . Go/No Go Decision on use of the Statewide SBDC Course Registration and Payment System	12/31/2021		Ken Betschart
	Notes • Will need to discuss with college. Could mean we breakaway from Enrole. • 4/30/21 Update - Pending network office decision. No system has been selected yet.			

Notes

No Goal Notes

Focus Area II: STRENGTHENING PARTNERSHIPS

Focus Area Vision:

Strong communications and processes for productive partnerships and relationships with stakeholders and clients (including cross Center partnerships).

Goal A IMPROVE EXTERNAL COMMUNICATIONS: IMPROVE COMMUNICATION AND MARKETING: Consistent and effective communications, promotions and marketing as measured by the creation and execution of digital marketing plan

Status: On Track 03/01/2021 - 25% Goal Champion: Ken Betschart Goal Key Team Members: Katharine Condon
 09/30/2021

Last status update on Mon, Mar 29, 2021 by Ken Betschart

Action Items

Complete	Details	Due Date	% Complete	Person(s) Responsible
	1 . Create digital media content map that outlines topics to be published	05/01/2021	15%	Katharine Condon
	Notes 1. Write-up event map 2. Work with Amy on what can she do for us? 1. adds 2. Boosted post 3. where does upskill come in?			
	2 . Create an audience on Facebook and LinkedIn Social Networks with a goal of 1,000 followers	12/31/2021	40%	Katharine Condon
	Notes 1/1/11 users of 538 4/1/21 users 647			
	3 . Create targeted "Constant Contact" campaign using Center iC or other databases	09/01/2021		Ken Betschart
	Notes 1. Call Ben Hemson on database 2. Utilize restaurant database 3. What industries do we want to target, with what content and when? 1. Who has the industry target data?			

Notes
 No Goal Notes

Goal B LEVERAGE PARTNERSHIPS: Work with Chamber/Agencies/Economic Development Organizations and identify potential opportunities to better partner and put plans in place with at least 3.

Status: On Track 01/01/2021 - 45% Goal Champion: Ken Betschart Goal Key Team Members: Chad Carpenter, Jose Balcazar, and Lisa Kyle
 07/30/2021

Last status update on Mon, Mar 29, 2021 by Ken Betschart

Action Items

No Action Items

Notes

No Goal Notes

Focus Area III: ASSISTING UNDERSERVED

Focus Area Vision:

Statewide network of bilingual training resources that are culturally relevant and accessible in rural and urban environments.

Goal A EDUCATION & AWARENESS: Increase CO accessibility to bilingual resources that are culturally relevant and available.

Status: Not Started

07/01/2021 -
12/31/2021

Goal Champion:
Ken Betschart

Goal Key Team Members:
Jose Balcazar

Last status update on Mon, Jan 18, 2021 by Ken Betschart

Action Items

Complete	Details	Due Date	% Complete	Person(s) Responsible
	1 . Analyze CO population data to gain understand the diversity footprint	03/31/2021		Ken Betschart
	Notes <ul style="list-style-type: none"> No business data exists through State of Oregon or City of Bend Demographics shows CO 93% white, 6% Latino, 1% other Could be an opportunity for Navigator grant. Check with Adam on interest level 			
	2 . Partner with Jose and Brad Porterfield of Latino Community Association to understand Latino businesses needs	06/30/2021	10%	Jose Balcazar
	Notes <ul style="list-style-type: none"> - Get appointment with Brad. 5/4. Jose will schedule time. What data does in have on CO Latino businesses? What teaching programs do the currently offer? Are there course the COCC SBDC could be offering? 			
	3 . Offer 3 new courses in the Spanish language	06/30/2021		Jose Balcazar
	Notes <ul style="list-style-type: none"> Course offered to Latino Chamber commerce and Clatsop What's your plan could be a good option. May be too long or not good for the classroom. 'Launch' will be in Spanish 			

Notes

No Goal Notes

Focus Area IV: IMPROVING ORGANIZATIONAL PERFORMANCE & CAPACITY

Focus Area Vision:

Improve organizational capacity, capability, performance and sustainability through enhanced processes and communication.

Goal A CREATE THE OPTIMAL ORGANIZATION

Status: Not Started

05/01/2021 -
07/31/2021

Goal Champion:
None

Goal Key Team Members:
None

Last status update on Tue, May 4, 2021 by Ken Betschart

Action Items

Complete	Details	Due Date	% Complete	Person(s) Responsible
	<p>1 . Size the organization for program offerings and geographic coverage</p> <p>Notes</p> <ol style="list-style-type: none">1. What's is the coverage model and hours?2. What courses should they teach?3. Should the be "irregular wage" or "regular employee"?4. Glide path to optimal organization staff	06/30/2021	20%	Ken Betschart
	<p>2 . Go / No go for 'Regular' Part-time adviser & Instructor</p> <p>Notes</p> <ul style="list-style-type: none">• Succession Planning for Jim• Greater engagement and productivity• Cost neutral	08/31/2021	5%	Ken Betschart

Notes

No Goal Notes

Goal B EMBED PERFORMANCE STANDARDS:

Status: Slow Progress

01/01/2021 -
12/31/2021

Goal Champion:
Ken Betschart

Goal Key Team Members:
None

Last status update on Mon, Mar 29, 2021 by Ken Betschart

Action Items

Complete	Details	Due Date	% Complete	Person(s) Responsible
	1 . Establish new adviser job descriptions	06/30/2021	60%	Ken Betschart
	Notes 3 types <ul style="list-style-type: none">• "Irregular Wage" part-time adviser• "Irregular Wage" part-time adviser & instructor• "Regular Employee" part-time adviser instructor - 24 hours a week			
	2 . Complete competitive pay review of advising positions	06/30/2021		Ken Betschart
	Notes 1. Look at what the do and get comparison with 3 other colleges <ul style="list-style-type: none">1. 3 colleges2. COCC help3. Christine Frazer 2. Make a pitch to Michael about pay increase <ul style="list-style-type: none">1. What they do2. Competitive pay summary3. Recommend pay increase			
	3 . Create advisor performance appraisal process & complete evaluations	12/31/2021		Ken Betschart

Notes

No Goal Notes

Goal C ADVISOR LEADERSHIP AND PROFESSIONAL DEVELOPMENT: Focus on professional development and training creating consistency and quality

Status: Not Started

07/01/2021 -
12/31/2021

Goal Champion:
None

Goal Key Team Members:
Jose Balcazar, Lisa Kyle,
Maureen Quinn, and Patti
Norris

Last status update on Mon, Jan 18, 2021 by Ken Betschart

Action Items

Complete	Details	Due Date	% Complete	Person(s) Responsible
	1 . Professional development planning for all staff of 25 hours or more.	09/30/2021	30%	Ken Betschart

Notes

- Staff Meeting; Quarterly topics to improve
 - Example: Patrick at COIC, Chuck Arnold at City of Redmond
 - New topics or technologies
- Routine discussion professional development with staff
 - Document what they want to learn?
- 1;1 coaching sessions with advisers
 - Review sessions notes and provide feedback
 - Pick a topic and work with them on.

Notes

No Goal Notes

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