



## PLANNING, INFRASTRUCTURE, & ECONOMIC REVITALIZATION (PIER)

### PROPOSED PROJECT PROPOSAL FORM

Instructions: Please complete all fields and email the completed form and attachments to [pier@hcs.oregon.gov](mailto:pier@hcs.oregon.gov) **no later than 11:59 pm on Wednesday, March 5, 2025**. Once received, you will be contacted regarding the next steps in the project evaluation and selection process. This proposal form is the first step in the selection process. If your project is selected, a full application must be completed and submitted to Oregon Housing and Community Services (OHCS).

Learn more about the PIER program on the [ReOregon website](#).

| Project Information                                                                                                                                                                  |                                                                                       |                                                             |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|-------------------------------------------------------------|
| Project Title:                                                                                                                                                                       | Jackson County PIER Targeted TA Program Extension                                     |                                                             |
| Primary Contact Name and Title:                                                                                                                                                      | Marshall Doak, Director, SBDC                                                         |                                                             |
| Phone Number:                                                                                                                                                                        | 541-552-8331                                                                          |                                                             |
| Email address:                                                                                                                                                                       | doakm@sou.edu                                                                         |                                                             |
| Project Lead Organization Name:                                                                                                                                                      | Southern Oregon University                                                            |                                                             |
| Type of Eligible Organization:                                                                                                                                                       | <input checked="" type="checkbox"/> Public Entity <input type="checkbox"/> Non-Profit |                                                             |
| Amount of PIER Funds Requested:                                                                                                                                                      | \$ 301,449.00                                                                         |                                                             |
| Type of Project                                                                                                                                                                      |                                                                                       |                                                             |
| <input type="checkbox"/> Planning                                                                                                                                                    | <input type="checkbox"/> Infrastructure                                               | <input checked="" type="checkbox"/> Economic Revitalization |
| Project Description                                                                                                                                                                  |                                                                                       |                                                             |
| <b>Describe how your project will benefit the long-term recovery of Jackson County.</b> The Jackson County community <b>must</b> be the primary beneficiary of the proposed project. |                                                                                       |                                                             |

On November 1, 2024, the Southern Oregon University Small Business Development Center received notification of award for the proposal submitted through the Jackson County PIER Committee and Oregon Housing and Community Services Department.

This proposal is an add-on to that award resulting from a better understanding of the affected community's needs, the need to have a steady physical presence in the affected communities, and to increase the capacity of the SOU SBDC to assist partner organization(s) deliver their award(s) made through the PIER Program funding. Specifically, this will enable the SBDC staff to have increased capacity to work with the (now) expected demand for grant and loan monies soon to be made available. This deeper engagement in the area of loan and grant deployment has become realized only in the last few months, the first months of our direct engagement after receiving clearance to proceed with our original grant project.

The increased scope of services will augment those already available through the previous grant award and will facilitate the ability of the SOU SBDC to bring the services through the original grant and this extension into the targeted LMI communities.

Working through and with local partner organizations and people, the Extension request will enable greater awareness to be made in the LMI business community for access to business support services to reduce business failures and set-backs. The business continuation assistance will be a driver for the Jackson County long-term recovery.

This request is made based on the current project timeline for service delivery from award date through October 2027, with closeout scheduled for the Spring of 2028.

## Project Summary

### 1. Project purpose, area of benefit, and a description of the proposed activity:

The original project purpose description was (condensed):

*"This project is designed to provide robust business support services to the individuals interested in starting businesses and entities currently in businesses within the fire-affected areas of Jackson County, OR. The business support services will include private confidential business advising, individual and group business education presentations, preparing the client businesses for capital acquisition through available grant and microloan assistance and connection to specialized resources for licensure and registrations for specialized needs such as government contracting or exporting goods and services. The goals are focused to provide end-to-end services and resources for business development with an emphasis on the LMI community and individuals."*

This project extension request is based on a better understanding of the communities needs gained through interactions within the affected areas since the original application and award. There is recognition of a need for an increased SBDC physical presence, partner support through client business interactions, and Spanish translation services. This extension request is made with these needs in mind.

The benefits of meeting these needs will be a more efficient use of resources, greater accessibility for the target LMI business community to receive program benefits, and to support English-deficient businesses through the availability of Spanish-speaking business support personnel.

The benefit area remains the same: direct engagements within the burn-scar areas with wider distribution of services throughout the County through the PIER grant operations and in conjunction with the SBDC, with active partner recruitment and engagement with the project.

### 2. Project delivery summary (i.e., how the work will be done and those responsible for or involved in completing the project):

The work elements will be performed by the Southern Oregon University's Small Business Development Center's (SBDC) Director on a part-time basis, a Project Manager who will be directly involved with client intake, monitoring and performance evaluation, and assisted by a bilingual business adviser for direct business assistance and instruction provision services. The Project Manager and Adviser will be funded wholly through the PIER grant on part-time bases. The team is comprised of individuals with specific skill sets who are dedicated to business establishment, survival, growth and retention through the provision of direct services to the client businesses. The SBDC Director will act as the Principal Investigator (PI) for the project, responsible for the compliance and reporting aspects of the project to OCHS, along with other SOU personnel in the Sponsored Programs Office on the SOU Campus.

### 3. What are the project's anticipated outcomes and how your goals will be measured?

The original set of outcomes and measures will remain the same, which are:

*The project's outcomes are anticipated to be:*

- *Community-level engagement with the LMI community to develop business starts pathways;*
  - *End-to-end technical assistance services to young microenterprises from ideation, establishment of a legal business, assistance with business strategic development and the acquisition of needed resources from third-party providers for financial needs and other specialized needs;*
  - *Specialized assistance to business owners wishing to exit for succession planning, valuation and transfer issues alongside economic development retention efforts by other TA providers*
  - *Provision of business education from business establishment under Oregon State and Federal Laws through our Small Business Management Course, a business accelerator course already in place. In between the Introduction and Accelerator courses, specific offerings occur with educational courses in operations, marketing and finance. As specific needs are encountered, customized industry-specific and general topic trainings can be produced and delivered in person and virtually.*
- LMI businesses will receive all of these services without cost.*

In addition to the original set of goals, the Extension will allow for:

- Rental of flex office space within the fire-affected area
- Rentals of venues for public engagements for larger groups, such as civic centers and community buildings
- Having bilingual English-Spanish capability for business clients with English-speaking and comprehension difficulties
- Increasing the resources available to assist loan and grant programs through PIER funding of partner organizations which increases the workload not anticipated as part of the original grant application in early 2024
- The development of new partnerships in the Shady Cove / Upper Rogue Valley areas through the Central Point and Eagle Point Chambers of Commerce.

Measurement will be made through the number and nature of the engagements with the businesses, in groups of various sizes and through 1:1 advising services provision. Additional measures will be made through the increase of work with English-challenged individuals. Consistent outreach to the LMI communities will be standard operating protocols and procedures.

## Resiliency and Long-Term Recovery

1. Does the project mitigate loss of life or property in the face of current and future natural hazards? If so, how?

Not necessarily. This Extension request does not directly address this issue under Economic Recovery. Some advice regarding best practices to 'disaster proof' businesses will be made when working with the businesses, so some property loss prevention activities will be made a part of the project, just not a major feature.

2. Explain how the project will support long-term recovery needs within historically underserved communities who have lacked adequate investments in housing, transportation, water, and wastewater infrastructure prior to the disaster.

Community development and long-term recovery, especially in historically underserved communities, is a combination of public and private investments into housing, facilities, amenities, transportation, workforce development and business development and support activities. Rural Oregon has historically been characterized as underserved and various populations within Oregon are likewise designated as underserved.

Technical assistance support to entrepreneurs, especially in close association with microlenders and community-based chambers and advocacy groups, has proven the strongest response for supporting long-term recovery. These, in short, are the intended effects of this project as proposed. Businesses become employers, businesses require services to be provided by other businesses and individuals, and this encourages commercial real estate investments as well as additional business formations to occur. The positive cycle of business development attracts additional investments into housing and community development.

This positive reinforcing mechanism produces increased tax receipts allowing government to participate in long-term recovery needs when grant funding expires.

## National Objective

All Infrastructure and Economic Revitalization projects funded with Community Development Block Grant Disaster Recovery (CDBG-DR) must meet the Low and Moderate Income (LMI) National Objective or the Urgent Need National Objective.

**Low and Moderate Income (LMI) National Objective:** Project or program has a limited clientele or a defined service area that is primarily residential, and at least 51% of the households within that service area are LMI. Ways to qualify: **OR**

**Urgent Need:** Project or program meets unmet needs that have a particular urgency, including addressing existing conditions that pose a serious and immediate threat to the health or welfare of the community. Project leads must also describe how the project responds to the disaster-related impact as described in the CDBG-DR impact and unmet needs assessment.

**Please describe which national objective your project will meet, and how it meets LMI or Urgent Need.**

Starting and operating a business successfully requires a large amount of effort and resiliency on entrepreneurs' parts. The factors of documenting the demographics of program participants in addition to the area benefit designation is not outside of the reach of the program as outlined, but the expected number of business-interested parties and successful starts and operations continuity is hard to predict on an individual basis. The affected communities are small and adjacent to populated areas, so the dynamics of business initiation are quite variable and difficult to forecast with accuracy.

Through experience gained to date, it has become evident that the original grant award can be efficiently enhanced to provide a more intimate community-based approach to small business development serving LMI-designated communities, along with addressing language barriers.

The SOU SBDC is using the ReOregon Household Demographics Form – 2024 to collect basic demographic information regarding the project's clients in a confidential manner for program qualification and for audit compliance purposes.

Administrative support protocols have been established to document program compliance to monitor the Low to Moderate Income (LMI) National Objective compliance status. This information is updated weekly and reported to OHCS monthly.

| Estimated Project or Program Budget                                   |                      |
|-----------------------------------------------------------------------|----------------------|
| Activity                                                              | Estimate             |
| Administration/Personnel                                              | 191,274.00           |
| Project Construction (All Other Non-Personnel Expenses)               | 0.00                 |
| Program Delivery (All Other Non-Personnel Expenses)                   | 2,000.00             |
| Other: Estimated rental of flex office presence for business advising | 43,000.00            |
| Other: Estimated rentals for public gathering venues for groups       | 4,500.00             |
| Other: SOU Indirect charges                                           | 60,675.00            |
| Other:                                                                | 0.00                 |
| <b>Total:</b>                                                         | <b>\$ 301,449.00</b> |

NOTE: The table above is for available estimates at time of project proposal. If your project is selected to move forward for OHCS to review, all funding for your project must be fully detailed and disclosed later during the application process to ensure budget accuracy and no duplication of benefits (DOB).