

**AGREEMENT FOR  
ECONOMIC DEVELOPMENT SERVICES  
(Yamhill County and SEDCOR)**

THIS AGREEMENT ("Agreement"), is made between Yamhill County, a political subdivision of the State of Oregon ("County") and the **Strategic Economic Development Corporation of the Mid-Willamette Valley, Oregon** ("SEDCOR"), an Oregon nonprofit corporation located at 626 High Street, NE, Suite 200, Salem, OR 9797301 ("Contractor")

**RECITALS:**

A. County, through its Board of Commissioners, provides economic development services. In order for County to provide these economic development services it is necessary for County to contract with a qualified consultant with training and expertise in professional economic development services (the "Project").

B. County has budgeted funds to perform the Project. County conducted a competitive request for proposal (RFP) process to select the most qualified proposer to provide the services described herein.

C. Contractor was the most qualified proposer and is qualified to provide the required professional economic development services and to perform the other related duties required by County and imposed by this Agreement. County and Contractor desire to enter into this Agreement and County is authorized to enter into this Agreement under ORS 203.010(3).  
NOW, THEREFORE

**AGREEMENT:**

In exchange for the promises and other consideration as set forth below, the receipt and sufficiency of which is hereby acknowledged, IT IS HEREBY AGREED BETWEEN THE PARTIES AS FOLLOWS:

1. **Services of Contractor.** Contractor agrees to perform the following services (the "Services"), in accordance with and as detailed in County's RFP and Contractor's proposal dated September 29, 2017, as amended, both of which are contained in Exhibit A, which is attached hereto and incorporated herein by this reference.

Any additional work beyond the Services may be negotiated individually at Contractor's hourly rate or at a negotiated project rate.

2. **County's Duties.** County shall provide the following items during the duration of this Agreement:

a. If any Services are provided at County offices, County shall provide the office space, terminals, telephone, office equipment, office furniture, computer hardware and software, and fixtures necessary to perform Services.

**3. Independent Contractor.** Contractor is engaged hereby as an independent contractor, and will be so deemed for purposes of the following:

a. Contractor will be solely responsible for payment of any federal or state taxes required as a result of this Agreement. County will not withhold any state or federal income taxes from payments owed Contractor.

b. As an independent contractor, Contractor acknowledges and agrees that Contractor is not entitled to any benefits granted to County employees. Without limitation, but by way of illustration, the benefits which are not granted to Contractor include vacation, holiday and sick leave, other leaves with pay, tenure, medical, and dental coverage, life and disability insurance, overtime, Social Security, Workers' Compensation, unemployment compensation, or retirement benefits, except as otherwise required by law.

c. Contractor is an independent contractor for purposes of the Oregon Workers' Compensation law (ORS Chapter 656) and is solely liable for any Workers' Compensation coverage under this Agreement. If Contractor has the assistance of other persons in the performance of this Agreement, Contractor will qualify and remain qualified for the term of this Agreement as a carrier-insured employer or a self-insured employer under ORS 656.403 et. seq.

**4. Compensation; Payment Schedule.** Unless previously terminated in accordance with Section 8, Contractor will provide the Services for a fee of \$12,267.00 per month, beginning on January 1, 2018 and continuing through the end of December, 2018. Unless previously terminated in accordance with Section 8, Contractor will provide Services for a fee of \$12,234.00 per month, beginning on January 2019 and continuing through the end of December, 2019. Contractor shall be compensated in the total amount of \$294,010.00 for Services rendered under this Agreement, which amount shall also be the maximum not-to-exceed amount to be paid under this Agreement unless this Agreement is amended or extended in a writing signed by both parties. The above rates are inclusive of any per diem rates described on Exhibit A. Any expenses incurred by Contractor in the performance of the Services under the terms and conditions of this Agreement not specifically provided for herein shall be the sole and separate responsibility of Contractor, unless preapproved in writing by County. The only compensation due Contractor is specifically stated in this Agreement. Upon request of County, but in no event less frequently than monthly, Contractor will provide written documentation of completed and ongoing tasks, hours and deliverables. Contractor shall submit monthly invoices by 25th of the month and, following receipt, review and approval of such invoices (in its sole discretion), County will issue monthly checks on approximately the 1st or 15th of each month or on the dates that best coincide with the County's standard billing cycle.

**5. INDEMNIFICATION.** CONTRACTOR AGREES TO INDEMNIFY AND HOLD HARMLESS COUNTY AND EACH OF ITS OFFICERS, AGENTS AND EMPLOYEES FROM AND AGAINST ANY AND ALL CLAIMS, DAMAGES, LOSSES AND EXPENSES, INCLUDING BUT NOT LIMITED TO ATTORNEYS' FEES, ARISING OUT OF OR RESULTING FROM CONTRACTOR'S PERFORMANCE OF THE SUBJECT WORK AND SERVICES UNDER THIS AGREEMENT OR CREATED BY ANY ACT OR ERROR OF A VENDOR, SUBCONTRACTOR OR ANYONE DIRECTLY OR INDIRECTLY EMPLOYED BY THE CONTRACTOR; PROVIDED HOWEVER, NOTHING HEREIN SHALL BE

CONSTRUED TO REQUIRE INDEMNIFICATION OF YAMHILL COUNTY FOR LIABILITY ATTRIBUTABLE TO YAMHILL COUNTY'S SOLE NEGLIGENCE.

**6. Insurance.** Contractor, at Contractor's own expense, shall obtain the following insurance coverage and keep them in effect during the entire term of this Agreement (except with respect to Professional Liability Insurance, which shall be kept in effect for a period of the term of this Agreement plus two years):

- a. Workers' Compensation Insurance in compliance with statutory requirements;
- b. Commercial General Liability Insurance (including contractual liability and completed operations coverage, and coverage for liability resulting from hazardous substances), on an occurrence basis, with not less than \$2,000,000 per occurrence for bodily injury and property damage liability, with an annual aggregate limit of \$3,000,000;
- c. RESERVED
- d. Commercial Automobile Liability Insurance, with a combined single limit, or the equivalent of not less than \$1,000,000 per occurrence, for bodily injury and property damage with respect to Contractor's vehicles, whether owned, hired, or non-owned, assigned to, or used by Contractor in connection with the Services.

The required insurance coverages shall be (i) with insurance companies admitted to do business in the state of Oregon and rated A or better by Best's Insurance Rating, and (ii) acceptable to County. At County's request, Contractor shall furnish County with certificates of insurance for each of the required insurance coverages. The certificates of insurance shall indicate (a) the types of insurance coverage, (b) the identity of all persons or entities covered, (c) the amounts of insurance coverage, and (d) the period of insurance coverage. Any required insurance coverage shall provide that it may not be canceled except after at least 30 days written notice to County.

The Commercial General Liability and Commercial Automobile Liability shall (i) name County, its directors, officers, and employees, as additional insureds, (ii) provide that it is primary insurance with respect to the interests of County and that any insurance maintained by County is excess and not contributory, and (iii) include a cross-liability and severability of interest clause and a waiver of subrogation clause.

**7. Private Business.** Contractor shall not operate any private business from any County property, nor shall Contractor utilize any County property for Contractor's private business, except to perform the Services described in this Agreement, however, phone calls received or made by Contractor using County equipment and while on County property shall be allowed only on an emergency, occasional basis. If a long distance telephone call is made on an emergency, occasional basis, it shall be charged to Contractor's private business telephone number or credit card.

**8. Term; Termination; Default.**

a. **Term.** Unless terminated in accordance with subsection (2), the term of this Agreement is from January 11, 2018 through December 31, 2019 and supersedes any prior agreements between the parties. Upon mutual written agreement of the parties this Agreement may be extended for up to two (2) additional one year terms.

b. Termination. Either party may terminate this Agreement on thirty (30) calendar days written notice to the other party. In addition, in the event County no longer receives funds adequate to enable it to continue this Agreement, it will provide written notice of immediate termination of this Agreement to Contractor. Upon issuance of notice, this Agreement is terminated. However, any obligations existing at the time of termination will survive termination. Contractor shall not make expenditures, enter into agreements, or encumber funds in its possession, or to be transferred by County, after notice of termination or termination as set out above, without prior written approval from County. Termination shall not excuse liabilities incurred prior to the termination date.

c. Default. If Contractor defaults in the performance of any of its material obligations under this Agreement for a period of thirty (30) days after the County sends notice of such default to the address on this Agreement, County may, at its option, terminate the Agreement, such termination to be effective immediately upon expiration of the thirty day notice period; provided, however, that in the event Contractor provides written notice to County that the default cannot reasonably be cured by Contractor within said thirty (30) day period and the Contractor provides written certification that it is, in good faith, endeavoring to cure said default, then the thirty (30) day cure period shall be extended for an additional reasonable period to allow for such cure, but any such extended period shall not exceed 30 additional days, unless otherwise mutually agreed in writing by both County and Contractor.

**9. Confidentiality.** Contractor acknowledges that Contractor may, in the course of its performance under this Agreement, be exposed to or acquire information that is the confidential information of County or County's clients. Any and all (i) County or County client information, (ii) information provided by County and marked confidential, or (iii) information identified as confidential in a separate writing, that becomes available to Contractor in the performance of this Agreement shall be deemed to be confidential information of County ("Confidential Information"). Any reports or other documents or items, including software, that result from Contractor's use of the Confidential Information are also deemed Confidential Information. Contractor agrees to hold Confidential Information in strict confidence, using at least the same degree of care that Contractor uses in maintaining the confidentiality of Contractor's own confidential information, and not to copy, reproduce, sell, assign, license, market, transfer or otherwise dispose of, give or disclose Confidential Information for any purposes whatsoever, except as may be provided elsewhere under this Agreement or in conformance with Exhibit A. Contractor agrees that, upon termination of this Agreement or at County's request, Contractor will turn over to County all documents, papers and other matter in Contractor's possession that embody Confidential Information.

**10. Compliance with Applicable Laws; Certification Regarding Compliance with Tax Laws.** Contractor agrees to comply with the rules and regulations of County, applicable state and federal regulations and all other provisions of state and federal law relating to Contractor's performance of Services under this Agreement. To the extent applicable Contractor certifies it will comply with ORS 279B.220 through 279B.235, which provisions are hereby incorporated into this Agreement by reference. Contractor will provide services to County clients without regard for race, color, creed, religion or national origin in compliance with Title IV, Civil Rights Act, 1954. Further, Contractor certifies compliance with the tax laws of the State of Oregon or a political subdivision of the state, including ORS 305.620 and ORS Chapters 316, 317 and 318.

11. **Subcontracts; Assignment.** Contractor shall not enter into any subcontracts for any of the Services required under this Agreement without County's prior written consent. Neither party may assign any of its rights or obligations hereunder, whether by operation of law or otherwise, without the prior written consent of the other party (not to be unreasonably withheld).

12. **Governing Law; Venue.** This Agreement, and any disputes arising out of or related hereto, shall be governed exclusively by the internal laws of the State of Oregon without regard to its conflicts of laws rules. Any claim, action, suit or proceeding between County and Contractor that arises from or relates to this Agreement shall be brought and conducted solely and exclusively within the Circuit Court of Oregon for Yamhill County. CONTRACTOR HEREBY CONSENTS TO THE IN PERSONAM JURISDICTION OF THESE COURTS AND WAIVES ANY OBJECTION TO VENUE IN THESE COURTS AND ANY CLAIM THAT THIS FORUM IS AN INCONVENIENT FORUM.

13. **Counterparts.** This Agreement may be executed by facsimile and in counterparts, which taken together shall form one legal instrument.

14. **Waiver and Cumulative Remedies.** No failure or delay by either party in exercising any right under this Agreement shall constitute a waiver of that right. Other than as expressly stated herein, the remedies provided herein are in addition to, and not exclusive of, any other remedies of a party at law or in equity.

15. **Attorney Fees.** In the event of legal suit or action, including any appeals therefrom, brought by either party against the other to enforce any of the obligations hereunder or arising out of any dispute concerning the terms and conditions under this Agreement, each party shall pay their own attorney's fees and costs incurred in the suit or action, including investigation costs, expert witness fees and all costs of depositions.

16. **Severability.** If any term of this Agreement is held to be invalid or unenforceable, it shall be severed from this Agreement and the balance of the Agreement shall be reasonably construed to carry out the intent of the parties as evidenced by the terms of this Agreement.

17. **No Third Party Beneficiaries.** Except as expressly provided herein, nothing contained in this Agreement is intended, nor shall it be construed to create rights for the benefit of third parties.

18. **Integration Clause.** This Agreement constitutes the entire agreement of the parties. No modifications of the Agreement shall be allowed except in a written document signed by all the parties.

19. **Exhibits and Recitals.** All exhibits and schedules referenced herein are incorporated herein. The recitals set forth above are incorporated into this Agreement as a material and substantive part of this Agreement.

20. Time is of the Essence. Time is of the essence in the performance of this Agreement

IN WITNESS WHEREOF, the parties have executed this Agreement on the dates set forth adjacent to their signatures below.

**CONTRACTOR**



Print Name/ Title Chad Freeman, President  
Date: 2/5/18

SS# /Tax ID#: \_\_\_\_\_

**APPROVED AS TO FORM**

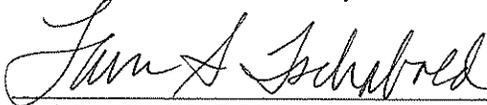
By:   
CHRISTIAN BOENISCH  
County Counsel

**YAMHILL COUNTY, OREGON**

  
MARY STARRETT, Chair

Board of Commissioners

Date: 2-6-18



LAURA TSCHABOLD,  
County Administrator

Date: 2-5-18

Accepted by Yamhill County  
Board of Commissioners on  
2-1-18 by Board Order  
# 18-26

## Attachment A

For the scope of the project and per the initial proposal presented and accepted by the Yamhill County Commission, SEDCOR will work to support Yamhill county and their economic development program. SEDCOR will do this by working in partnership with the county as well as the local municipalities and other partners in the region. This work will focus on supporting and building out the traded sector firms in the county, and the underlying infrastructure to do this.

The SEDOR proposal focused on key assets on some select areas of economic development, including the Retention and Expansion of local firms, the recruitment of new traded sector businesses, marketing of key opportunities as well as building and supporting smaller communities on their work to provide spaces and connections for their business to thrive. A few key points to this work will be the hiring of BRE Manager for Yamhill County, the establishment of an advisory board to guide economic development grant decisions as well as advise the county commission and make strategic direction decisions.

Key Assets which will be provided:

- I. Full time Business Retention and Expansion manager. The BR&E Manager, based in Yamhill County, and the SEDCOR team will conduct meetings with public and private sector representatives to understand the unique attributes and cultures within Yamhill County; identify the needs of the business community; form an Advisory Committee for Yamhill County; and produce an inventory of available commercial and industrial land; current traded-sector businesses, internship and workforce development programs; and marketing materials for every city in the Yamhill County. This work will include:
  - a. Work to attract foreign and domestic companies to locate in the region.
  - b. Promoting international trade and export.
  - c. Supporting and marketing the Enterprise Zone program and other business tax incentives.
  - d. Managing a portfolio of raw land and industrial real estate locations.
  - e. Marketing the region to new investors.
  - f. Bringing public and private partners together to support economic development.
  - g. Leading and coordinating workforce development activities and internship programs with private and public partners.
  - h. Hosting forum lunches and other networking and educational events.
  - i. Creating publications to share information about our members and their communities.
  - j. Coordinating with local school districts to introduce students to jobs in the traded sector industry through job fairs and other activities.
  - k. Assisting local cities in writing proposals for Business Oregon to attract new businesses to the area.

1. Partnering with SEDCOR Construction Alliance members to create competitive advantages for developers, companies and investors in the construction industry.
- II. Ongoing quarterly reporting of this work to the County commissioners
  - a. Number of company visits per quarter and yearly total.
  - b. Number of jobs created per quarter and yearly total.
  - c. Amount of investments per quarter and yearly total.
  - d. The number of active recruitment projects and completed projects.
  - e. Updates on defined goals and strategies.
  - f. Other data requested by the Commissioners.
  - g. Reports the Advisory Committee.

## **Economic Development Services**

SEDCOR will hire a full-time Business Retention and Expansion Manager serving and working in Yamhill County. Through this support SEDCOR will be able to coordinate what is happening at the community level, design an effective strategy for the County and leverage resources from the regional, state and federal levels.

### **Retain and expand traded sector businesses**

With any regional effort, whether it is between two towns or 10 cities, it is important to gather input from community and business leaders to develop the vision and define what success looks like. A first step in building Yamhill County's economic infrastructure is forming an Advisory Board, a group of people who are committed to the cause and vested in the outcomes that reflect a diverse set of perspectives. SEDCOR will recruit volunteers to serve on the Advisory Board and ensure representatives of public agencies and private enterprise are included. This Advisory Board can help to focus, refine and review potential Strategic Grants by Yamhill County. The proposed budget also includes tactical funding to help implement strategic objectives identified by the Advisory Board. While we don't want to presume to know what this board believes is important, there are some clear tactical priorities such as funding and supporting internship programs, industry specific projects such as a wine initiative, or expanding the Innovate Oregon work.

Once an Advisory Board is formed, staff will meet with the leadership of each community to gather knowledge about the unique assets, opportunities and challenges for growth, and the inventory of available land, resources and current infrastructure. Staff will develop and maintain a database of the assets for each community and use the data to help cities or defined communities develop an economic development plan for their area. SEDCOR will encourage interested businesses to use the database to understand the communities within Yamhill County as well.

SEDCOR will strive to ensure local traded sector companies have the workforce they need within Yamhill County by aligning education and training opportunities with local business needs. Specifically, SEDCOR will assist Innovate Oregon in Yamhill County

school districts by connecting local businesses to two annual events and recruit businesses to support Evergreen Aviation & Space Museum's AgTech Challenge and other career and technical education events. SEDCOR is supportive of the McMinnville WORKS program and is working with Incite and Chemeketa Community College to strengthen internship programs.

**Recruit traded sector businesses**

SEDCOR is well positioned to recruit traded sector businesses to Yamhill County because of the team's ongoing participation with Team Oregon Advanced Manufacturing, Team Oregon Food Processing and Oregon Economic Development Association. Staff will promote Yamhill County's assets among other economic development professionals to increase their understanding of Yamhill County's natural resource, employment and other traded sector assets. In addition, SEDCOR regularly collaborates with partners on direct marketing efforts to site selectors and companies from other states and countries.

SEDCOR will leverage existing relationships to promote Yamhill County's assets at local, national and international tradeshows and assist other economic development partners throughout Yamhill County with introductions, meetings and data. We have provided a detailed list of recruitment work and outreach that will be a part of these efforts in the timeline. These will support key industries as well as international opportunities.

By developing and maintaining relationships with local brokers and land or building owners, SEDCOR will standardize and manage Yamhill County's inventory of available land and buildings so it is current. This information is critical for recruitment efforts and will be readily available when organizations like Business Oregon ask SEDCOR to submit proposals on behalf of Yamhill County.

**Identify and commit local resources to develop and support Yamhill County communities' economic development.**

By forming and facilitating a Yamhill County Advisory Board, SEDCOR will be able to coordinate efforts and launch action teams to achieve goals for countywide efforts. SEDCOR will leverage local, regional and state resources for the Advisory Board and train and manage action teams. SEDCOR will facilitate quarterly meetings and produce progress reports.

**Increase Yamhill County's marketability**

Yamhill County has some impressive workforce development initiatives. SEDCOR will market these efforts to state and national audiences. In addition, SEDCOR will promote Innovate Oregon's efforts in Yamhill County, create marketing material including information on business incentives, demographics and existing companies for each of the 10 cities, and provide updates to websites on economic development news including expansions and new businesses.

### **Support entrepreneurs**

Entrepreneurs need access to mentors, resources and investors to successfully grow their businesses. SEDCOR will network entrepreneurs with existing services and experts in the region. SEDCOR will help the Chehalem Valley Innovation Accelerator connect with technology-focused businesses and host meet-ups to connect entrepreneurs with educational sessions and potential investors. SEDCOR will work to bring programs for entrepreneurs that have been developed by Oregon Entrepreneurs Network, Oregon Technology Business Center and TiE Oregon to Yamhill County.

The SEDCOR Business and Retention Expansion Manager for Yamhill County will work closely with SEDCOR President Chad Freeman to make quarterly reports to the Yamhill County Board of Commissioners. Staff will track their activities carefully and report on the following metrics:

- Number of company visits per quarter and yearly total.
- Number of jobs created per quarter and yearly total.
- Amount of investments per quarter and yearly total.
- The number of active recruitment projects and completed projects.
- Updates on defined goals and strategies.
- Other data requested by the Commissioners.
- Reports on the Advisory Committee.
- Generated media for Yamhill County and its businesses along with updates on communications materials and events.

### **Collaboration**

Effective economic development requires public and private partnerships to successfully bring good paying jobs in the traded-sector industries to local communities. SEDCOR has a proven track record of working collaboratively with cities, counties, state agencies, nonprofit organizations and private businesses to promote economic vitality and stability throughout the Mid-Willamette Valley.

SEDCOR often serves as the liaison between private companies and public partners. The following examples demonstrate SEDCOR's collaborative approach:

To effectively and efficiently communicate with Yamhill County Commissioners, city officials and various partners, SEDCOR will:

- Attend Yamhill County Commission meetings each quarter to present a progress report.
- Add Yamhill County representatives to serve as SEDCOR board members.
- Hire, train and support a new Business Retention and Expansion Manager to lead SEDCOR's efforts in Yamhill County.
- Communicate with city officials at least once a month.

- Stay apprised of all city, school district and county public meetings to monitor community issues that impact economic development.
- Host networking meet-ups for people to discuss ideas and concerns.
- Work with chambers and tourism groups to refine their marketing materials to attract new businesses to the region.
- Host quarterly Advisory Board meetings.
- Host Roundtables for CEOs and specific industry groups to share ideas.
- Establish a new SEDCOR office in Yamhill County to make it easy to connect with economic development personnel.
- Work with the local media to inform people about the SEDCOR and Yamhill County partnership and provide guidance on how to contact SEDCOR for assistance.

## **Additional Resource Allocation**

SEDCOR has extensive experience guiding counties with their strategic economic development grant programs. The SEDCOR team would advise the Yamhill County Commissioners to task the Economic Development Advisory Board to develop the goals, criteria and process for administering additional resources, such as the Oregon Video Lottery Reserves. SEDCOR criteria for these grant programs have typically included a focus on traded sector companies, leveraging investments, job creation, and key or emerging industries.

## **Expenses**

### *Subcontracts- Yamhill Response Fund*

In our work with counties as well as advisory boards, we have found that often these boards unearth problems and opportunities, which need resources to be solved. We propose that a fund be available to the Yamhill Advisory Board to support their efforts to address problems and take advantage of opportunities.

- Work for support a regional wine effort to continue to connect local wineries and wine growers to continue their growth.
- Implement work-force training programs, such as a countywide internship program to help connect employers with future workforce.
- Marketing efforts to continue to highlight both the work and the opportunities in the county, this could include a one-stop website to be developed.
- Support for the Innovate Yamhill efforts that are moving forward to connect technology with workforce.

## Timeline

Much of the work of economic development will be based on ongoing relationships and working individually with both companies and communities to implement effective plans to grow together. This includes identifying strategic opportunities that can be focused on and growing these together with our partners.

That being said there are some firm guidelines and markers for what we would like to accomplish to grow on the foundation that has been laid in Yamhill County. Our timelines are focused on a couple of key areas, Community Building Blocks, Recruitment, Expansion and Marketing. We have laid out these timelines below and look forward to adding to this.

### *Recruitment*

Below is the current itinerary for the work we are doing in the next 12 months. We look forward to continuing to work with Yamhill County on these global opportunities.

- January- Represent Yamhill County and the Region at the NW Food Processors Show.
- February- Work with California Food processors and manufacturers at the California Food Processors Show.
- March- Represent and market Yamhill County and the region at Natural Products Show in California.
- July- outreach to Site Selection professionals from across the United States.
- October- represent the region at the Doing Business in Oregon convention in Tokyo.
- November- Chicago Manufacturing Show (Fabtech) to help connect local manufacturers to global opportunities.

In addition to the recruitment outreach above SEDCOR also has engaged contractors to reach out across the US to connect with business interested in working in the region and connects directly with those interested firms.

The best recruitment strategy that we have found continues to be the ability to continue to work successfully with your existing customers. This is why at its core we believe any successful economic development program is based on a strong Retention and Expansion effort. Below are some of the metrics and guidelines we have found to be successful.

### *Retention/ Expansion/ Startup*

Within the first 90 Days of this contract SEDCOR expects to:

- Hire and introduce the new Business Retention and Expansion Manager.

- Work directly with ongoing projects in the region, including supply chain opportunities, outreach in Japan, as well as working to help projects that are moving forward.
- Sit down directly with 25 local firms to discuss work in Yamhill county, successes and areas of opportunities.
- Update SEDCOR's existing manufacturing database of traded sectors in the region.
- Bring the first educational event to Yamhill County.

Annually SEDCOR will:

- Bring at least four regional trainings a year to the community.
- Host Business roundtables to help connect business leaders with information and networks they need to be successful.
- Have at least 100 company visits to connect directly with Yamhill County firms.

### *Marketing*

The work of economic development requires an in depth understanding in order to convey the message effectively. In the first six months. we anticipate preparing:

- Key industry marketing pieces to highlight local strengths.
- Work with cities to create marketing material.
- Database of existing facilities that are available.
- Respond to state and local inquiries.
- Building an integrated marketing campaign to be implemented.

### *Community Building Blocks*

Meeting with local cities and helping to understand their strength and weaknesses as well as how they interact with firms to support jobs. It is our policy to work with communities wherever they are in their economic development work. That is that we know that some communities may want direct hands on economic development support, and others may want us to be more of a resource rather than a project lead.

To help with this in the first 90 days, we will:

- Meet with all the cities and tribes about how we can work together.
- Work with Yamhill County Commissioners create guidelines for Strategic Investment Fund.
- Identify County Advisory Board members and coordinate initial meeting.
- Host first quarterly debrief with commissioners to identify opportunities and how we can continue to grow this program.

- Work with the Counties Strategic Doing work to identify paths forward from this work.

Annually, we will:

- Meet with all communities directly to identify challenges and work to be done.
- Coordinate directly with Commissioners to ensure regular communication of projects work.



**Requests for Proposals  
For Economic Development Services For  
Yamhill County, Oregon  
434 NE Evans Street  
McMinnville, OR 97128  
503-434-7501**

**PROPOSALS DUE: October 2, 2017 by 3:00 p.m.**

**SUBMIT PROPOSALS TO:**

***By Mail:***

**ATTN: Carrie Martin, Grants and Special Projects Manager  
Yamhill County Board of Commissioners  
535 NE 5<sup>th</sup> Street  
McMinnville, OR 97128**

***In-Person Delivery:***

**ATTN: Carrie Martin, Grants and Special Projects Manager  
Yamhill County Board of Commissioners  
434 NE Evans Street  
McMinnville, OR 97128**

## Requests for Proposals for Economic Development Services

Notice is hereby given that the Board of County Commissioners of Yamhill County, Oregon (“the Board”) is currently soliciting proposals from qualified organizations or individuals to provide economic development services as set forth in this Request for Proposals (“RFP”), to be effective December 1, 2017. The Board is interested in establishing a contract for county-wide economic development services that focus primarily on the smaller cities and unincorporated areas, with additional collaboration and coordination with McMinnville, Newberg, and other economic development strategic partners within the local and regional area. This RFP is intended to provide interested organizations with sufficient information to prepare and submit proposals for consideration by the Board. It is the Board’s intent to select the most advantageous proposal based on the evaluation criteria stated in this RFP.

A copy of the “Requests for Proposals for Economic Development Services” will be available at no charge from the Yamhill County Board of Commissioners, 535 N.E. 5th Street, McMinnville, Oregon 97128, telephone (503) 434-7501.

Responsive Proposals for Economic Development Services must be physically received in the office of the Yamhill County Board of Commissioners, 434 NE Evans Street, McMinnville, Oregon 97128 not later than **3:00 p.m. local time on Monday, October 2, 2017**. The Board or its designee will complete an evaluation process of all proposals meeting the criteria defined in this RFP. Following receipt and review of proposals by an evaluation committee comprised of citizens and county staff, qualified proposers will be invited to interview with the Board. Interviews will be held at a time and date to be announced. Proposer designees/representatives must be available for the interview and must be prepared to respond to detailed questions regarding their organization composition, qualifications, and other criteria. After interviews and further consideration, the Board will then designate the proposer for final negotiation of a contract for Economic Development Services.

The Board reserves the right to reject any or all proposals received that are not in compliance with all prescribed procedures and requirements. Furthermore, Yamhill County (i) may reject any and all proposals upon the finding that it is in the public interest to do so, (ii) may require modifications to the winning proposal, and (iii) reserves the right to waive any and all minor informalities to evaluate the proposals submitted. Questions regarding this RFP should be addressed to Carrie Martin, Grants and Special Projects Manager, at (503) 474-4991 or [martinc@co.yamhill.or.us](mailto:martinc@co.yamhill.or.us).

**PROPOSERS SHALL USE RECYCLABLE PRODUCTS TO THE MAXIMUM EXTENT ECONOMICALLY FEASIBLE IN THE PERFORMANCE OF THE WORK AND SERVICES SET FORTH HEREIN**

DATED at McMinnville, Oregon this 29 day of August, 2017. By LAURA TSCHABOLD, County Administrator

## Section 1.0 Background

Yamhill County (referred to herein as “Yamhill County” or “County”) is located in the Willamette Valley of Oregon. The County seat is McMinnville, about 35 miles southwest of Portland. The County has a population of approximately 103,630 residents. Yamhill County is a general law county with three (3) elected Commissioners and five (5) elected department heads and an appointed County Administrator and County Counsel. The remainder of the County falls under the supervision of the appointed County Administrator. Yamhill County operates on a \$140 million budget, maintaining approximately \$10 million in general liability insurance. Further, Yamhill County maintains property insurance valued at \$86 million. Yamhill County employs approximately 696 employees and provides a myriad of services, including but not limited to, public health, adult, youth and family behavioral health services, roads, bridges, parks, fairgrounds, law enforcement, juvenile and adult corrections facilities.

On June 13, 2017, the Board and lay members of the Yamhill County Budget Committee met to discuss recommendations made in the original 2013 GROW Yamhill County report, and to discuss adoption of the proposed mission, vision, and strategic plan for Yamhill County economic development. The initial report recommended four strategies for implementation, which the Board decided to condense and adopt as two principal strategies (see Attachment C). The two strategies adopted are:

1. Retain, Expand, and Recruit Business
2. Identify and Commit Resources that Will Invest in Yamhill County Economic Development

## Section 2.0 Scope of Services

The Yamhill County Economic Development Services contractor will be responsible for the economic development work of the county, primarily through the promotion of desirable business growth and vitality via attraction, expansion, and/or retention of business. Yamhill County has determined its economic development needs require a multi-faceted, comprehensive approach that includes vision, planning, outreach, marketing and promotion, financial incentive tools, and partnership development. Yamhill County Economic Development Services contractor must work with a wide range of individuals, departments, organizations, and partners to promote the business and economic vision, plans, programs, services, interests, and vitality of the community. Yamhill County has determined the ceiling amount for all contracts for each year is \$150,000. Each proposal should contain the offeror’s best terms from a cost or price and technical standpoint.

The successful proposer will provide the following services to the County:

- a. Work with the County, its cities and communities to encourage and receive their participation, and to promote a common economic development focus.

- b. Be knowledgeable about Yamhill County, its history, culture, communities, programs, geology, and economy
- c. Conduct market research as necessary
- d. Establish a collaborative and coordinated economic development effort for the County, its cities and communities. The outcome is to generate community wealth, foster regional links, support workforce development and training, and create a balanced and diverse industry base that provides living wage jobs and supports a full range of community services
- e. Assist in the support and development of county-wide businesses, industries, and sectors through proactive strategies that foster growth, marketing, promotion, training, and job creation
- f. Act as a clearing house and information exchange service for business and commercial site seekers, and potential development partners in Yamhill County
- g. Bring regional, state, and federal partners and resources to the table whenever available. Assist communities in updating their community profile information and make them available on state, county, city, and economic development websites
- h. Maintain familiarity with federal and state legislative and regulatory developments that will impact existing and new businesses in Yamhill County, its cities and its communities, and provide necessary advice to both businesses and public agencies to ensure a favorable business climate throughout Yamhill County
- i. Assist existing and new businesses with economic development-related funding, financing options, and/or financial incentives for business expansions and related infrastructure
- j. Understand how regional, state, and federal programs can advance Yamhill County economic goals
- k. Seek to leverage Yamhill County economic development funds with other state, federal, and private grant funding opportunities
- l. Provide technical assistance and information to local businesses and new investors in an effort to generate and sustain economic growth in Yamhill County. Create and maintain a new investor/expanding business packet
- m. Support and coordinate with existing economic development initiatives taking place in Yamhill County
- n. Deliver quarterly written and oral summaries and budget reports outlining past, current, and future activity to the Board
- o. Advise and consult with the Board of Commissioners regarding the judicious use of approximately \$125,000 in Strategic Investment Funds (SIF) derived from video lottery receipts for the purpose of business recruitment and expansion

## Section 3.0 General Information

### 3.1 Schedule

Date of RFP Release: August 29, 2017

Questions due by: 5:00 PM September 22, 2017

Proposals due: 3:00 p.m. local time, Monday, October 2, 2017 in the Board office, ATTN: Carrie Martin, Grants and Special Projects Manager, 434 NE Evans Street in McMinnville, Oregon 97128. **NO PROPOSALS SHALL BE ACCEPTED AFTER THIS DATE AND TIME.**

Qualified proposers must submit **10 copies** of their proposal labeled "Proposal for Economic Development Services" to the Yamhill County Board. The proposals must be physically received by **3:00 p.m. local time, Monday, October 2, 2017** in the Board office, ATTN: Carrie Martin, Grants and Special Projects Manager, 434 NE Evans Street in McMinnville, Oregon 97128.

### 3.2 Submission of Proposals

- a. Be sure to read and follow all instructions and information prior to preparing the proposal. **In order for a proposal to be considered, these instructions must be followed.**
- b. Proposals must be typed, using a standard font, no smaller than 11pt type size. Each topic must be addressed in the order given. The entire proposal must be limited to 10 double-sided sheets (20 pages), including cover page and all attachments.
- c. Proposals should include the following items in their proposals:
  - 1) Clear, concise responses to all questions in the Narrative Proposal (section 4.0)
  - 2) Cost Proposal (section 5.0) must be completed using the budget template provided in *Attachment A*
  - 3) Signed Proposal Submission Form provided in *Attachment B*
- d. Proposals by corporations must be executed in corporate name by president, vice-president, or other corporate officer. Proposals not signed by individuals making them must have attached thereto power of attorney evidencing authority to sign proposal in name of person for whom it is signed. All names must be typed or printed below signature.
- e. All proposals shall be submitted in a sealed envelope, clearly marked on the outside:

**PROPOSAL: Economic Development Services**

If mailed, address to:           ATTN: Carrie Martin, Grants and Special Projects Manager  
Yamhill County Board of Commissioners  
535 NE 5<sup>th</sup> Street  
McMinnville, OR 97128

*Or*

Deliver directly to:   ATTN: Carrie Martin, Grants and Special Projects Manager  
Yamhill County Board of Commissioners  
434 NE Evans Street  
McMinnville, OR 97128

### **3.3    Questions Regarding RFP**

All written communications pertaining to this RFP should be directed by mail to Carrie Martin, Grants and Special Projects Manager, 434 NE Evans Street, McMinnville, Oregon, 97128; or by email to [martinc@co.yamhill.or.us](mailto:martinc@co.yamhill.or.us); or by fax to (503) 434-7553 so that they are received not later than 5:00 pm on Friday, September 22, 2017. If a question is determined appropriate, it will be answered in a written addendum sent to all parties and posted on the county website. Respondents shall not rely on verbal or written representations regarding this RFP except for written addenda issued by Yamhill County.

### **3.4    Incurred Costs**

The county is not liable for any costs incurred by a proposer in the preparation and/or presentation of a proposal.

### **3.5    Insurance Requirements**

Identify the professional liability coverage that the organization carries.

### **3.6    Evaluation Process and Selection Criteria**

Yamhill County will appoint a committee to evaluate the proposals received in response to this RFP. The evaluation committee will be comprised of Yamhill County citizens and staff. The evaluation committee will evaluate, score and rank proposals in accordance with the point values set forth in the Narrative Proposal (section 4.0) and Cost Proposal (section 5.0) of this RFP. Qualified proposers may be invited to interview with the evaluation committee, and/or the Board of Commissioners. If interviews are included at this stage of the selection process, the review committee may elect to ask the proposers specific questions and use a uniform scoring system based on answers to the questions.

Proposals submitted that do not meet the requirements of this RFP will not be evaluated and will be returned to the respective proposer. Yamhill County reserves the right to (i) reject any and all

proposals if it determines rejection of the proposals is in the best interest of the County and (ii) waiver any and all minor informalities.

### **3.7 Final Interviews**

Proposers may be invited to an interview with the Board and the County Administrator. The Board and County Administrator may rate the selected proposers based on the original proposal and/or a set of uniform questions selected by the Board and County Administrator. Proposers will be contacted regarding time and location of the interview to take place. The Board and the County Administrator, at their sole discretion, will determine whether to hold interviews with the proposers who are in a competitive range or to recommend that the contract be awarded without interviews on the basis of the proposal submitted and as evaluated and scored by the evaluation committee.

### **3.8 Protests**

- a. A protest must be submitted in writing to the Board, and shall state the basis for the protest and the course of action that the protesting party desires the Board take. A protest based upon restrictive specifications or other provisions of the RFP must be received by the Board not later than seven (7) business days prior to the date set for receipt of proposals. A protest based upon any other grounds must be received by the Board not later than five (5) business days after the date the Board provides notice of highest scoring proposer, or within five (5) business days after the time the protesting party first became aware of, or reasonably should have become aware of the notice, whichever is sooner.
- b. If the protest does not meet these requirements, the Board may, at the Board's option, reject the protest or allow the protesting party a reasonable time to correct the deficiencies in the protest documentation. Yamhill County shall not be obligated to postpone a contract award in order to allow a proposer to correct a deficient protest, unless otherwise required by law. Upon receipt of a properly submitted protest, the Board shall review the protest and provide a written decision to the protesting party.
- c. Yamhill County shall not be obligated to postpone selection of a proposer pending resolution of a protest, unless otherwise required by law.

### **3.9 Rejection of RFP Proposals**

Yamhill County reserves the right to postpone the proposal opening date for its own convenience and reserves the right to reject any and all proposals if it determines rejection of the proposals is in the best interest of the County. In addition, Yamhill County may conduct its own independent evaluation of persons or entities listed in a proposal to verify that the proposer is qualified to provide services for this project. A proposer shall provide all requested information as requested by the

County to verify that it can complete this project. Failure to provide the requested information shall be grounds for disqualification.

Though not exclusive, the following list includes examples of grounds for which the County may elect to reject a proposal:

- a. The proposal is conditioned in whole or in part upon the addition, revision, or deletion of any requirement or provision in any part of the RFP.
- b. The proposal does not provide the experiences needed.
- c. The proposer does not have sufficient financial ability to perform the contract.
- d. The proposer does not have experience necessary to perform the contract.
- e. The proposer does not have key personnel available of sufficient experience to perform the contract.
- f. The proposer has breached contractual obligations to public or private contracting agencies.

### **3.10 Cancellation**

Yamhill County reserves the right to decline to select a proposer if the County deems it in its best interest to do so. Yamhill County may cancel this RFP or reject any or all proposals in accordance with ORS 279B.100. In no event shall Yamhill County have any liability for refusal to select a proposer. The proposer assumes the sole risk and responsibility for all expenses connected with the preparation and submission of their proposal.

### **3.11 Public Record**

As provided below, all proposals are public information and Yamhill County shall make available the identity of all proposers after the proposals have been opened. Proposals are not required to be open for public inspection until after the notice of intent to award a contract has been issued (ORS 279B.060(5)), and all protests are public information after the protest period ends. Subject to the above, all proposals shall be available for public inspection (ORS 192.420 to 192.505) except to the extent the proposer designates trade secrets or other proprietary data to be confidential (ORS 192.501(2)).

### **3.12 Equal Opportunity Policy; Non-Discrimination**

Yamhill County requires all proposers to comply with equal opportunity policies. Its programs, services, employment opportunities, and volunteer positions and contracts are open to all persons without regard to race, religion, color, national origin, sex, age, marital status, handicap, political affiliation, or any other protected class. A copy of Yamhill County's policy is available upon request.

All proposers will recruit, select, train, promote, transfer and release its personnel, as contemplated here under, without regard to any protected class, e.g. race, color, religion, national origin, disability, age or sex (except where the class is a bona fide occupational qualification). Further, proposers will administer its other personnel policies such as compensation, benefits, layoff, returns from layoff, company sponsored training, education, and tuition assistance without regard to any protected class.

Additionally, by signing and submitting its proposal, proposer certifies that proposer has not discriminated, and will not discriminate, against a subcontractor in the awarding of a subcontract because the subcontractor is certified under ORS 200.055 as a disadvantaged business enterprise, a minority-owned business, a woman-owned business, an emerging small business, or a business that a service-disabled veteran owns.

### **3.13 Reservation of County Rights**

Although price is a consideration in determining the apparent successful proposer, the intent of the RFP is to identify a proposal from a proposer that has a level of specialized skill, knowledge and resources to perform the work described in the RFP. Qualifications, performance history, expertise, knowledge and the ability to exercise sound professional judgment are primary considerations in the selection process. Due to the highly technical nature of some of these tasks, the proposer with the lowest price proposal may not necessarily be awarded a contract. Yamhill County reserves the sole right to determine the best proposal, in accordance with the RFP evaluation criteria. In the event any Proposer to whom a contract is awarded fails to execute the contract prepared by Yamhill County or fails to furnish satisfactory insurance within the time and in the manner hereinafter specified, to re-award the contract to another Proposer. Yamhill County reserves the right to make such changes or corrections to the Scope of Services and RFP as it may deem necessary or desirable prior to the proposal due date. Prospective Proposers will be notified of such changes in writing by addenda. Yamhill County shall not be responsible for oral interpretations. Any changes will be in the form of addenda as described herein. All such addenda shall become part of the proposal and resulting contract.

### **3.14 Withdrawing Proposals**

After proposals are opened by Yamhill County, the proposer may not withdraw proposals for sixty (60) calendar days. However, prior to the date/time set for the proposal opening, proposals may be modified or withdrawn by the Proposer's authorized representative in person, or by written notice. If proposals are modified or withdrawn in person, the authorized representative shall make his/her identity known and shall sign a receipt for the proposal. Written notices shall be received by Yamhill County no later than the exact date and time for proposal opening.

## **Section 4.0 Narrative Proposal**

The proposal should be a maximum of 10 double-sided sheets (total 20 pages) of written materials, excluding biographies and brochures which may be included in an appendix, describing the ability of the qualified company to provide the Scope of Services, as outlined in the Section 2 of this RFP. Resumes of the primary staff are not included in this page count. The proposal should be submitted on double-sided recycled paper (post-consumer content). No waxed page dividers or non-recyclable materials should be included in the proposal. The proposal should include the following information listed in sections 4.1 through 4.9.

### **4.1 Executive Summary (10 Points)**

Briefly describe your organization's mission and vision, and how you will apply them to Yamhill County's economic development program.

### **4.2 Organization (10 Points)**

- a. Describe the evolution of your organization including the date founded, ownership, any subsidiary relationships, and office locations.
- b. Briefly describe how your organization is staffed and the scope of work of each individual. Describe the experience of the principals, including a description of their knowledge of economic development, business management, accounting/financial practices, and marketing/advertising.

### **4.3 Experience (10 Points)**

- a. Specifically describe four (4) contracts you have executed and performed that are similar to the Scope of Services requested in Section 2 of this RFP. Include at least two local government scopes of service you have provided in the last five (5) years.

### **4.4 Economic Development Services (35 Points)**

- a. Summarize your plan and strategy for economic development in Yamhill County, including specific industries and sectors.
- b. Provide a detailed description of your proposed approach to accomplishing the economic development objectives outlined in Section 2.0, Scope of Services.
- c. Provide a timeline for accomplishing the project, including critical paths and milestones.

### **4.6 Proposed Staff (15 points)**

- a. Provide names, resumes and describe experience for the individuals to be assigned to provide or support the functions described in Section 2.0, Scope of Services. Include length of service with the company, qualifications and certifications, work experience, and professional organizations.

**4.7 Collaboration (15 Points)**

- a. Provide specific examples of how your organization successfully collaborated with a wide range of constituent groups, including cities, counties, state agencies, nonprofit organizations, and private businesses.
- b. Describe the process for ensuring effective communication between your company with the various partners and constituent groups in Yamhill County.

**4.8 References (5 Points)**

- a. Provide three (3) references of similar Scope of Services as described in Section 2.0 of this RFP that will help to confirm the company's skills in providing similar services for Yamhill County.

**4.9 Licensure (Pass/Fail)**

- a. Provide a copy of the liability insurance held by the company.

## **Section 5.0 Cost Proposal**

### **5.1 Budget (55 points)**

- a. Provide a two (2) year project budget for Yamhill County economic development program, using the budget template including in *Attachment A*.
- b. What expenses are covered under the fee schedule?
- c. This contract for economic development services may include two (2) 12-month contract extension options. Please provide financial estimates for these additional two (2) contract extensions.

### **5.2 Funding (25 points)**

- a. Describe how your organization has utilized state, federal, and/or foundation grant funding in the past, and how you plan to make use of those resources in this economic development services contract.
- b. Describe how you will leverage public and private funds, such as those available through Business Oregon and the Governor's Strategic Reserve Fund, to maximize Yamhill County's economic development budget.

### **5.2 Additional Resource Allocation (20 points)**

- a. Make recommendations for ways in which Yamhill County can develop and administer \$125,000 of additional Oregon video lottery reserves to spur economic development, such as a small revolving loan program, or strategic investment of economic development funds.

**Section 6.0 Sample Contract**

The contract between Yamhill County and the successful Proposer will be in substantially the following form. In addition to the contractual requirements detailed below, the remaining contract terms and conditions shall be negotiated with the successful proposer once they have been selected and negotiations are underway. The RFP and the successful proposer’s proposal shall be incorporated into the final contract. Final contract language will be determined by mutual consent.

*[Yamhill County Sample Contract]*

**AGREEMENT FOR  
ECONOMIC DEVELOPMENT SERVICES**

THIS AGREEMENT (“Agreement”), is made between Yamhill County, a political subdivision of the State of Oregon ("County") and \_\_\_\_\_ located at \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_ 97 \_\_\_\_\_ ("Contractor")

**RECITALS:**

- A. County, through its Board of Commissioners, provides economic development services. In order for County to provide these economic development services it is necessary for County to contract with a qualified consultant with training and expertise in professional economic development services (the “Project”).
- B. County has budgeted funds to perform the Project. County conducted a competitive request for proposal process to select the most qualified proposer to provide the services described herein.
- C. Contractor was the most qualified proposer and is qualified to provide the required professional transit management services and to perform the other related duties required by County and imposed by this Agreement. County and Contractor desire to enter into this Agreement and County is authorized to enter into this Agreement under ORS 203.010(3). NOW, THEREFORE

**AGREEMENT**

In exchange for the promises and other consideration as set forth below, the receipt and sufficiency of which is hereby acknowledged, IT IS HEREBY AGREED BETWEEN THE PARTIES AS FOLLOWS:

**SECTION 1 SERVICES OF CONTRACTOR.**

1. Contractor agrees to perform the following services (the "Services"):

See Exhibit A

In addition to the services found in Exhibit A, Contractor agrees to perform the following:

- a. \_\_\_\_\_.
- b. \_\_\_\_\_.
- c. \_\_\_\_\_.

Any additional work beyond the Services may be negotiated individually at Contractor's hourly rate or at a negotiated project rate.

**SECTION 2 COUNTY'S DUTIES.** County shall provide the following items during the duration of this Agreement.

1 If any Services are provided at County offices, County shall provide the office space, terminals, telephone, office equipment, office furniture, computer hardware and software, and fixtures necessary to perform Services.

**SECTION 3 INDEPENDENT CONTRACTOR.** Contractor is engaged hereby as an independent contractor, and will be so deemed for purposes of the following:

1. Contractor will be solely responsible for payment of any federal or state taxes required as a result of this Agreement. County will not withhold any state or federal income taxes from payments owed Contractor.

2. As an independent contractor, Contractor acknowledges and agrees that Contractor is not entitled to any benefits granted to County employees. Without limitation, but by way of illustration, the benefits which are not granted to Contractor include vacation, holiday and sick leave, other leaves with pay, tenure, medical, and dental coverage, life and disability insurance, overtime, Social Security, Workers' Compensation, unemployment compensation, or retirement benefits, except as otherwise required by law.

3. Contractor is an independent contractor for purposes of the Oregon Workers' Compensation law (ORS Chapter 656) and is solely liable for any Workers' Compensation coverage under this Agreement. If Contractor has the assistance of other persons in the performance of this Agreement, Contractor will qualify and remain qualified for the term of this Agreement as a carrier-insured employer or a self-insured employer under ORS 656.403 et. seq.

**SECTION 4 COMPENSATION; PAYMENT SCHEDULE.** Contractor will provide the Services for a fee of \$ \_\_\_\_\_ per \_\_\_\_\_ month, beginning in \_\_\_\_\_, 20\_\_ and continuing through the end of \_\_\_\_\_, 20\_\_\_. Contractor shall be compensated in the total amount of \$ \_\_\_\_\_ for Services rendered under this Agreement, which amount shall also be the maximum not-to-exceed amount to be paid under this Agreement unless this Agreement is amended in a writing signed by both parties. The above rates are inclusive of any per diem rates described on Exhibit A. Any expenses incurred by Contractor in the performance of the Services under the terms and conditions of this Agreement not specifically provided for herein shall be the sole and separate responsibility of Contractor, unless preapproved in writing by County. The only compensation due Contractor is specifically stated in this Agreement. Upon request of County, but in no event less frequently than monthly, Contractor will provide written documentation of completed and ongoing tasks, hours and deliverables. Contractor shall submit monthly invoices by 25th of the month and, following receipt, review and approval of such invoices (in its sole discretion), County will issue monthly checks for \$ \_\_\_\_\_ on approximately the 1st or 15th of each month or on the dates that best coincide with the County's standard billing cycle.

**SECTION 5 INDEMNIFICATION.** CONTRACTOR AGREES TO INDEMNIFY AND HOLD HARMLESS COUNTY AND EACH OF ITS OFFICERS, AGENTS AND EMPLOYEES FROM AND AGAINST ANY AND ALL CLAIMS, DAMAGES, LOSSES AND EXPENSES, INCLUDING BUT NOT LIMITED TO ATTORNEYS' FEES, ARISING OUT OF OR RESULTING FROM CONTRACTOR'S PERFORMANCE OF THE SUBJECT WORK AND SERVICES UNDER THIS AGREEMENT OR CREATED BY ANY ACT OR ERROR OF A VENDOR, SUBCONTRACTOR OR ANYONE DIRECTLY OR INDIRECTLY EMPLOYED BY THE CONTRACTOR; PROVIDED HOWEVER, NOTHING HEREIN SHALL BE CONSTRUED TO REQUIRE INDEMNIFICATION OF YAMHILL COUNTY FOR LIABILITY ATTRIBUTABLE TO YAMHILL COUNTY'S SOLE NEGLIGENCE.

**SECTION 6 INSURANCE.** Contractor, at Contractor's own expense, shall obtain the following insurance coverage and keep them in effect during the entire term of this Agreement (except with respect to Professional Liability Insurance, which shall be kept in effect for a period of the term of this Agreement plus two years):

1. Workers' Compensation Insurance in compliance with statutory requirements;
2. Commercial General Liability Insurance (including contractual liability and completed operations coverage, and \_\_\_\_\_ coverage for liability resulting from hazardous substances), on an occurrence basis, with not less than \$1,000,000 \_\_\_\_\_ per occurrence for bodily injury and property damage liability, with an annual aggregate limit of \$2,000,000;
3. Professional Liability Insurance, including errors and omissions coverage, with a per occurrence and aggregate \_\_\_\_\_ limit of not less than \$1,000,000, to protect against all loss suffered by

County or third parties, including financial and consequential loss, caused by error, omission, or negligent acts related to provision of the Services;

4. Commercial Automobile Liability Insurance, with a combined single limit, or the equivalent of not less than \$1,000,000 per occurrence, for bodily injury and property damage with respect to Contractor's vehicles, whether owned, hired, or non-owned, assigned to, or used by Contractor in connection with the Services;

The required insurance coverages shall be (i) with insurance companies admitted to do business in the state of Oregon and rated A or better by Best's Insurance Rating, and (ii) acceptable to County. At County's request, Contractor shall furnish County with certificates of insurance for each of the required insurance coverages. The certificates of insurance shall indicate (a) the types of insurance coverage, (b) the identity of all persons or entities covered, (c) the amounts of insurance coverage, and (d) the period of insurance coverage. Any required insurance coverage shall provide that it may not be canceled except after at least 30 days written notice to County.

The Commercial General Liability and Commercial Automobile Liability shall (i) name County, its directors, officers, and employees, as additional insureds, (ii) provide that it is primary insurance with respect to the interests of County and that any insurance maintained by County is excess and not contributory, and (iii) include a cross-liability and severability of interest clause and a waiver of subrogation clause.

**SECTION 7 PRIVATE BUSINESS.** Contractor shall not operate any private business from any County property, nor shall Contractor utilize any County property for Contractor's private business, except to perform the Services described in this Agreement, however, phone calls received or made by Contractor using County equipment and while on County property shall be allowed only on an emergency, occasional basis. If a long distance telephone call is made on an emergency, occasional basis, it shall be charged to Contractor's private business telephone number or credit card.

**SECTION 8 TERM; TERMINATION; DEFAULT.**

1. Term. Unless terminated in accordance with subsection (2), the term of this Agreement is from \_\_\_\_\_, 20\_\_ through \_\_\_\_\_ 20\_\_\_\_ and supersedes any prior agreements between the parties.

2. Termination. Either party may terminate this Agreement on thirty (30) calendar days written notice to the other party. In addition, in the event County no longer receives funds adequate to enable it to continue this Agreement, it will provide written notice of immediate termination of this Agreement to Contractor. Upon issuance of notice, this Agreement is terminated. However, any obligations existing at the time of termination will survive termination. Contractor shall not make expenditures, enter into agreements, or encumber funds in its possession, or to be transferred by County, after notice of termination or termination as set out above, without prior written approval from County. Termination shall not excuse liabilities incurred prior to the termination date.

3. **Default.** If Contractor defaults in the performance of any of its material obligations under this Agreement for a period of thirty (30) days after the County sends notice of such default to the address on this Agreement, County may, at its option, terminate the Agreement, such termination to be effective immediately upon expiration of the thirty day notice period; provided, however, that in the event Contractor provides written notice to County that the default cannot reasonably be cured by Contractor within said thirty (30) day period and the Contractor provides written certification that it is, in good faith, endeavoring to cure said default, then the thirty (30) day cure period shall be extended for an additional reasonable period to allow for such cure, but any such extended period shall not exceed 30 additional days, unless otherwise mutually agreed in writing by both County and Contractor.

**SECTION 9 CONFIDENTIALITY.** Contractor acknowledges that Contractor may, in the course of its performance under this Agreement, be exposed to or acquire information that is the confidential information of County or County's clients. Any and all (i) County or County client information, (ii) information provided by County and marked confidential, or (iii) information identified as confidential in a separate writing, that becomes available to Contractor in the performance of this Agreement shall be deemed to be confidential information of County ("Confidential Information"). Any reports or other documents or items, including software, that result from Contractor's use of the Confidential Information are also deemed Confidential Information. Contractor agrees to hold Confidential Information in strict confidence, using at least the same degree of care that Contractor uses in maintaining the confidentiality of Contractor's own confidential information, and not to copy, reproduce, sell, assign, license, market, transfer or otherwise dispose of, give or disclose Confidential Information for any purposes whatsoever, except as may be provided elsewhere under this Agreement or in conformance with Exhibit A. Contractor agrees that, upon termination of this Agreement or at County's request, Contractor will turn over to County all documents, papers and other matter in Contractor's possession that embody Confidential Information.

**SECTION 10 COMPLIANCE WITH APPLICABLE LAWS.** Contractor agrees to comply with the rules and regulations of County, applicable state and federal regulations and all other provisions of state and federal law relating to Contractor's performance of Services under this Agreement. To the extent applicable Contractor certifies it will comply with ORS 279B.220 through 279B.235, which provisions are hereby incorporated into this Agreement by reference. Contractor will provide services to County clients without regard for race, color, creed, religion or national origin in compliance with Title IV, Civil Rights Act, 1954. Further, Contractor certifies compliance with the tax laws of the State of Oregon or a political subdivision of the state, including ORS 305.620 and ORS Chapters 316, 317 and 318.

**SECTION 11 SUBCONTRACTS; ASSIGNMENT.** Contractor shall not enter into any subcontracts for any of the Services required under this Agreement without County's prior written consent. Neither party may assign any of its rights or obligations hereunder, whether by operation of

law or otherwise, without the prior written consent of the other party (not to be unreasonably withheld).

**SECTION 12 GOVERNING LAW; VENUE.** This Agreement, and any disputes arising out of or related hereto, shall be governed exclusively by the internal laws of the State of Oregon without regard to its conflicts of laws rules. Any claim, action, suit or proceeding between County and Contractor that arises from or relates to this Agreement shall be brought and conducted solely and exclusively within the Circuit Court of Oregon for Yamhill County. CONTRACTOR HEREBY CONSENTS TO THE IN PERSONAM JURISDICTION OF THESE COURTS AND WAIVES ANY OBJECTION TO VENUE IN THESE COURTS AND ANY CLAIM THAT THIS FORUM IS AN INCONVENIENT FORUM.

**SECTION 13 COUNTERPARTS.** This Agreement may be executed by facsimile and in counterparts, which taken together shall form one legal instrument.

**SECTION 14 WAIVER AND CUMULATIVE REMEDIES.** No failure or delay by either party in exercising any right under this Agreement shall constitute a waiver of that right. Other than as expressly stated herein, the remedies provided herein are in addition to, and not exclusive of, any other remedies of a party at law or in equity.

**SECTION 15 ATTORNEY FEES.** In the event of legal suit or action, including any appeals therefrom, brought by either party against the other to enforce any of the obligations hereunder or arising out of any dispute concerning the terms and conditions under this Agreement, each party shall pay their own attorney's fees and costs incurred in the suit or action, including investigation costs, expert witness fees and all costs of depositions.

**SECTION 16 SEVERABILITY.** If any term of this Agreement is held to be invalid or unenforceable, it shall be severed from this Agreement and the balance of the Agreement shall be reasonably construed to carry out the intent of the parties as evidenced by the terms of this Agreement.

**SECTION 17 NO THIRD PARTY BENEFICIARIES.** Except as expressly provided herein, nothing contained in this Agreement is intended, nor shall it be construed to create rights for the benefit of third parties.

**SECTION 18 INTEGRATION CLAUSE.** This Agreement constitutes the entire agreement of the parties. No modifications of the Agreement shall be allowed except in a written document signed by all the parties.

**SECTION 19 EXHIBITS AND RECITALS.** All exhibits and schedules referenced herein are incorporated herein. The recitals set forth above are incorporated into this Agreement as a material and substantive part of this Agreement.

**SECTION 20 TIME ESSENCE.** Time is of the essence in the performance of this Agreement

IN WITNESS WHEREOF, the parties have executed this Agreement on the dates set forth adjacent to their signatures below.

**CONTRACTOR**

**YAMHILL COUNTY, OREGON**

\_\_\_\_\_  
Print Name/ Title \_\_\_\_\_

Date: \_\_\_\_\_

SS# /Tax ID#: \_\_\_\_\_

\_\_\_\_\_  
STAN PRIMOZICH, Chair

Board of Commissioners

Date: \_\_\_\_\_

APPROVED AS TO FORM:

\_\_\_\_\_  
LAURA TSCHABOLD, County Administrator

Date: \_\_\_\_\_

By: \_\_\_\_\_

CHRISTIAN BOENISCH, County Counsel

**EXHIBIT A**  
**SERVICES**

*[End Yamhill County Sample Contract]*

**Attachment B**

**Proposal Submission Form**

I, the undersigned, having read and with full understanding of all Proposal specifications, terms and conditions, do submit the following Proposal to provide Yamhill County, Oregon with **Economic Development Services** and certify that the proposal is made without connection with any person, firm or corporation making a proposal for the same goods and/or services and is in all respects fair and without collusion or fraud.

Proposer's Printed Name: \_\_\_\_\_

Proposer's Signature: \_\_\_\_\_

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

FAX Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

**RESIDENT BIDDER CERTIFICATE**

Pursuant to Compliance with Oregon Revised Statutes: "Resident Bidder" Certification:

Yes, I certify that I am a "resident bidder."

(ORS 279A.120(b): "Resident bidder" means a bidder that has paid unemployment taxes or income taxes in this state during the 12 calendar months immediately preceding submission of the bid, has a business address in this state, and has stated in the bid whether the bidder is a "resident bidder" under this paragraph)

No, I am not a "resident bidder."

("Non-resident bidder" means a bidder who is not a "resident bidder" as defined in ORS 279A.120(a); please refer to the Oregon Revised Statutes regarding state requirements for Non-Resident Bidders that are awarded a contract in Oregon.)

I am domiciled in the State of \_\_\_\_\_  
Indicate State

Attachment C

**Yamhill County Economic Development  
Vision, Mission, Values, and Strategies**



**YAMHILL COUNTY  
ECONOMIC DEVELOPMENT  
VISION, MISSION, VALUES AND  
STRATEGIES  
JUNE 2017**

**Mission**

The Yamhill County Economic Development Plan will direct and prioritize the actions and resource allocations necessary to realize business growth, job retention and creation, and enhanced well-being for all individuals and communities.

**Vision**

The Yamhill County Economic Development Plan will contribute to the development of thriving, vibrant communities where people live, learn, work, shop and play; and will foster sustainability of a dynamic environment in which business and industry prosper.

**Values**

**Collaboration and Inclusiveness:** We believe that we cannot resolve economic development challenges by ourselves. We value sharing, inclusiveness, and equity. We are accessible, and will reinforce this through active engagement of those we serve and support. We promote diversity, open communication, ongoing collaboration and the free exchange of ideas.

**Entrepreneurship and Innovation:** We believe a resilient and pioneering spirit is essential to positive economic change. We value proactivity and creativity—we will try new ideas to achieve better outcomes. We must be visionary, progressive, and flexible in the setting of goals and implementation of our plans. We are committed to entrepreneurship and encourage innovative thinking to achieve and sustain our desired outcomes.

**Ethics and Integrity:** We will foster a civil and ethical environment by encouraging trust, cooperation and respect. We value hard work, passion, and a strong work ethic. We will be positive in our approach to issue resolution and committed to developing effective economic development solutions with integrity and excellence.

**Accountability and Stewardship:** We believe that fiscal responsibility and prudent stewardship of funds and resources are essential. We will foster long-term prosperity and sustainability. We value social responsibility and hold ourselves accountable for the efficient use and conservation of our financial resources, environmental assets, and human potential.

**Commitment to our Communities:** We value the differences and commonalities of our unique communities, urban and rural alike. We are committed to cultivating what is already working to ensure our communities remain authentic, welcoming, engaging, and intimate. We will represent the essence of our communities by being open, humble, fair, friendly, outgoing, warm and generous. We believe successful economic development requires matching the unique qualities of each community with growth opportunities to ensure a good fit. We will foster the growth of social capital, and the interconnectivity that make this county remarkable.

On June 13, 2017, the Board of Commissioners and lay members of the Yamhill County Budget Committee met to discuss recommendations made in the original 2013 GROW report, and to discuss the possible adoption of the proposed mission, vision, and strategic plan for Yamhill County economic development. The initial report recommended four strategies for implementation, which the Board has decided to condense and adopt as two principal strategies. The two strategies being adopted are:

**Strategy 1:**

Retain, Expand and Recruit Business

**Strategy 2:**

Identify and Commit Resources that Will Invest in Yamhill County Economic Development

From here, goals are identified for the strategies. Goals are defined as subsets of strategies that should be specific, measureable, achievable, realistic, and time-based. Goals support the strategies, and state *what* is to be accomplished.

Underneath each goal are statements of how the work of each goal could be accomplished at a high level. These components of the action plan are titled Objectives.

Last are outcomes for each strategy. The end results identified for each strategy—what specifically will be accomplished. The outcomes will identify strategic success.

All of these elements are reflected in the strategies below.

## Strategy 1: Retain, Expand and Recruit Business

### Outcomes:

1. Small businesses and entrepreneurs know where to go for assistance and programs are in place to help them.
2. The business community is nurtured, mentored and recognized.
3. Available space is occupied and existing businesses are retained or expanded.
4. Business start-ups in traded sector companies are on the rise.

Goals (The "What")	Objectives (The "How")
1.1 Educate and support growth in target business sectors.	1.1.1 Communicate business sector information to communities. 1.1.2 Provide research, intel, education and mentoring to communities to assist and support growth in sectors.
1.2 Grow, maintain and recruit business in target sectors.	1.2.1 Establish relationships with businesses in targeted sectors. 1.2.2 Connect businesses to resources. 1.2.3 Nurture existing businesses. 1.2.4 Partner to attract/pursue business recruitment.
1.3 Market strengths and assets of businesses and the County.	1.3.1 Participate and monitor community groups and networks. 1.3.2 Build portfolio of assets. 1.3.3 Push portfolio of assets through stakeholder groups, website and social media.
1.4 Support entrepreneurship.	1.4.1 Support mentored activities for entrepreneurs. 1.4.2 Assist entrepreneurs in connecting to available resources. 1.4.3 Convene stakeholders to develop incubator models.

## Strategy 2: Identify and Commit Resources that Will Invest in Yamhill County Economic Development

### Outcomes:

1. There is a detailed, up-to-date inventory of resources readily accessible.
2. Yamhill County's community assets and resources are packaged and marketed in a way that is business friendly.
3. There is collaborative problem solving and leveraging of economic development resources.
4. One hundred percent of communities invest in economic development.
5. Communities are supported, mentored and know how to access resource information.
6. Strong partner relationships are developed and sustained.

Goals (The "What")	Objectives (The "How")
2.1 Identify and build a Toolbox of available business and community resources.	2.1.1 Coordinate with resource partners (local, regional, state partners; workforce development, economic development, community action groups) 2.1.2 Identify potential financial assistance (grants, foundations, loans, community growth programs, government assistance, partner agencies, private funding) 2.1.3 Identify potential resources for human development (low-cost/no-cost training, development opportunities, education and skills development, high performance) 2.1.4 Discuss options for investing Video Lottery Funds
2.2 Assist and support businesses and communities in seeking resources.	2.2.1 Create easy access to the toolkit. 2.2.2 Push toolkit to users including training on how to use it. 2.2.3 Connect businesses to the resources.
2.3 Inform communities about solutions and resources to overcome infrastructure and other economic development obstacles.	2.3.1 Identify resources to address economic development obstacles. 2.3.2 Support communities in making improvements that will better attract business.
2.4 Support the development of trusted relationships among partners.	2.4.1 Identify new opportunities to create collaborative, diverse groups in support of economic development efforts. 2.4.2 Support development of partnership projects among business, education, and communities (internships, work study). 2.4.3 Identify resources that can be provided by peers and facilitate the development of relationships to share those resources.

<p>2.5 Support sustainable community collaboration</p>	<p>2.5.1 Develop trusted relationships among community leaders.</p> <p>2.5.2 Support ongoing collaboration among community leaders and communities within the county.</p> <p>2.5.3 Develop community business sharing (consortia, education, etc.).</p>
<p>2.6 Support valuable community development</p>	<p>2.6.1 Educate communities about how to identify and address development opportunities (seminars, best practices research, etc.).</p> <p>2.6.3 Provide communities with knowledge and tools to develop their own strategies and goals around economic development.</p>

Category Year 1 Year 2 Extension Year 3 Extension Year 4

**REVENUE**

Yamhill County Contract for Services	\$ 150,000.00	\$ 150,000.00	\$ 150,000.00	\$ 150,000.00	\$ 150,000.00
Additional Funding Sources	\$ -	\$ -	\$ -	\$ -	\$ -
Additional Funding Sources	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Income</b>	<b>\$ 150,000.00</b>				

**EXPENSES**

**Project Personnel**

List	\$ -	\$ -	\$ -	\$ -	\$ -
List	\$ -	\$ -	\$ -	\$ -	\$ -
List	\$ -	\$ -	\$ -	\$ -	\$ -
List	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Project Personnel</b>	<b>\$ -</b>				

**Subcontracts**

List	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Subcontracts</b>	<b>\$ -</b>				

**Materials, Supplies, & Equipment**

List	\$ -	\$ -	\$ -	\$ -	\$ -
List	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Materials, Supplies &amp; Equipment</b>	<b>\$ -</b>				

**Travel**

List	\$ -	\$ -	\$ -	\$ -	\$ -
List	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Travel</b>	<b>\$ -</b>				

**Other Direct Costs**

List	\$ -	\$ -	\$ -	\$ -	\$ -
List	\$ -	\$ -	\$ -	\$ -	\$ -
List	\$ -	\$ -	\$ -	\$ -	\$ -
List	\$ -	\$ -	\$ -	\$ -	\$ -

**Total Other Direct Costs**

\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Project Expenses</b>	<b>\$ -</b>				

President  
Chad Freeman

2017-2018  
Executive Council

Chair  
Mark Hoyt  
Sherman Sherman  
Johnnie & Hoyt, LLP

Secretary/Treasurer  
Chair Elect  
Daryl Knox  
The Aldrich Group

Past Chair  
Rich Duncan  
Rich Duncan Construction

Members at Large  
Patricia Callihan-Bowman  
Express Employment  
Professionals

Kevin Cameron  
Marion County  
Commissioner

Brent DeHart  
Northwestern Mutual

Theresa Haskins  
Portland General Electric

Nathan Levin  
Nathan Levin Co.

Steve Powers  
City of Salem

September 29, 2017

Yamhill County Commissioners  
Stan Primozich, Chair  
Mary Starrett, Vice Chair  
Rick Olson  
535 NE Fifth Street  
McMinnville, OR 97128

Dear Commissioners Primozich, Starrett and Olson,

On behalf of the SEDCOR Board of Directors, thank you for the opportunity to demonstrate how SEDCOR can serve your communities and help your economy grow and prosper, as a partner in Oregon's great Mid-Willamette Valley region.

An African proverb reads, *"If you want to go fast, go alone. If you want to go far, go together."* Economic development takes leadership, teamwork and resources. In this global economy, it's tough to do economic development effectively on your own. At SEDCOR, we believe a regional approach helps all communities take advantage of the knowledge, expertise and resources available at the local, state and federal levels.

For 35 years, SEDCOR has developed a track record and reputation for nurturing long-lasting public and private partnerships at the local, county, state, national and international levels. Our job is to serve traded-sector companies that want to grow and expand in the region. Through our dedicated daily effort to communicate with business leaders, we learn about their needs and coordinate the effort to solve their problems with the right partners.

Over the past three years, we have had the privilege of working with Yamhill County to provide economic development services primarily for the manufacturing sector. We have enjoyed the opportunity to learn about the world-class companies in your borders. If given the opportunity to build on this base of experience, we propose to hire a full-time Business Retention and Expansion Manager for Yamhill County that will work in partnership with the SEDCOR team, and will have an office in Yamhill County. Although the contract between Yamhill County and SEDCOR officially ended June 30, SEDCOR has continued to work with Yamhill County businesses. We are currently assisting five companies with economic expansion because we believe in the value of having Yamhill County as a partner in regional economic development.

The BR&E Manager will provide the critical capacity Yamhill County needs to connect and communicate with business and community leaders from all 10 cities, the unincorporated areas and the tribes.

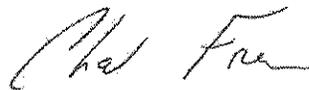
Many of the challenges facing Yamhill County such as keeping up with infrastructure improvements, workforce development and training, skill shortages in traded sector industries, and making industrial and commercial land available are similar to the challenges that Marion and Polk counties face.

By working together as a Mid-Willamette Valley region, we will be able to network Yamhill County business leaders with others in the region, coordinate resources more effectively and advocate for change when necessary on behalf of a larger coalition.

This proposal describes the way we conduct our work and what we will do to ensure Yamhill County residents benefit from the results of your investment in economic development.

Thank you for your consideration.

Sincerely,

A handwritten signature in cursive script that reads "Chad Freeman".

Chad Freeman  
SEDCOR President

## Executive Summary

Strategic Economic Development Corporation or SEDCOR is the lead economic development organization for Oregon's Mid-Willamette Valley. With more than 350 members, our nonprofit association leverages its strong public and private partnerships to successfully retain and attract high value jobs and capital investments in Marion, Polk and Yamhill counties.

SEDCOR's mission is to support and grow regional traded-sector businesses in these key industries:

- Advanced manufacturing
- Agriculture and food processing
- Technology
- Wood products and forestry
- Transportation and distribution
- Aviation and aerospace

Through careful market research and analysis, we know these industries are most competitive for the Mid-Willamette Valley region and bring the most potential for job growth, living wages and new investments in the local economy.

Our vision is a thriving Mid-Willamette Valley that has the resources it needs to grow companies, employ residents and attract new investment to the region.

In the past five years, SEDCOR and its public and private partners have assisted companies with more than \$356 million in capital investments, which resulted in 3,828 new and retained jobs in Marion, Polk and Yamhill counties, or an average of \$71.2 million and 765 jobs per year.

We are hopeful that we can expand on the work we have done in Yamhill County with the manufacturing sector to serve all traded-sector industries. SEDCOR will hire a full-time Business Retention and Expansion Manager to serve Yamhill County and work closely with the SEDCOR team.

The BR&E Manager, based in Yamhill County, and the SEDCOR team will conduct meetings with public and private sector representatives to understand the unique attributes and cultures within Yamhill County; identify the needs of the business community; form an Advisory Committee for Yamhill County; and produce an inventory of available commercial and industrial land; current traded-sector businesses, internship and workforce development programs; and marketing materials for every city in the Yamhill County.

Once the inventory is available, the Advisory Committee will be able to identify areas that are eligible for business incentives, such as enterprise zones.



For more than three decades, SEDCOR has provided the economic development services to Marion and Polk Counties and has a proven track record of serving the traded-sector businesses in Oregon's Mid-Willamette Valley. SEDCOR has the expertise and drive to achieve Yamhill County's outlined objective and help it achieve its full potential to bring continued economic development to benefit its citizens.

## **Organization**

In 1979, Boise Cascade Paper Mill closed in downtown Salem. More than 280 people with well-paying jobs were out of work. Desperate to diversify the economy, then Salem Mayor Kent Aldrich convened a 100-member task force named "Project 90" to evaluate the local economy and develop a strategic plan. He understood that the plan and future economic development activities needed to be multifaceted. As a result of this task force, the nonprofit Salem Economic Development Corporation was created in April 1982 with a mission to help existing businesses grow and expand while also welcoming new businesses and capital investments to the region.

Thirty-five years later, the mission continues to focus on growing job opportunities throughout the region. The current name reflects the organization's focus of providing regional economic development: Strategic Economic Development Corporation. SEDCOR is located in Salem, but serves all of Marion and Polk counties including the unincorporated areas. Over the past three years, SEDCOR has had the privilege of serving Yamhill County by focusing on its manufacturing companies.

Four employees currently serve SEDCOR members and clients. Resumes are provided in the Appendix. Chad Freeman, President, has 20 years of experience in strategic planning, economic development, real estate, community outreach, program development and public policy. He has led a workforce organization in Eastern Oregon, served as a Business Development Officer in the Metro Portland region and served as SEDCOR's President for five years. He currently chairs the Government Affairs Committee for the Oregon Economic Development Association and serves on the Mid-Willamette Valley Regional Solutions Advisory Committee, Marion County Re-entry Initiative, Willamette University's Atkinson Business School Advisory Board, Salem-Keizer School District's CTEC Advisory Council and Incite Workforce Investment Board. In the past, he has served on the board of Oregon Economic Development Association, Pacific Northwest Defense Coalition and others.

Nick Harville, Business Retention and Expansion Manager, has spent 10 years at SEDCOR providing his expertise in business planning, expansion planning, market identification, grant writing, financial economic resources and land use and planning laws. Nick led the development of the IMOM program, an effort that identifies the skills needed by employers and helps them reach the employees they need. Nick also led the formation of the SEDCOR Construction Alliance.

Tami Lundy, Special Events and Office Manager, has spent 20 years at SEDCOR. Tami is responsible for planning and executing over 20 business focused events per year, managing communication with the board of directors and responsible for the fiscal operations.

Kristine Thomas is the Communications and Marketing manager. She started seven months ago, but she has 30 years of experience in communications and marketing as a writer, editor and photographer.

## Experience

SEDCOR works to understand the unique qualities, history, economies and cultures of the communities it serves. Staff serve as trusted partners in managing economic development activities that best serve the region. Activities include:

- Retaining and expanding existing businesses.
- Attracting foreign and domestic companies to locate in the region.
- Promoting international trade and export.
- Supporting and marketing the Enterprise Zone program and other business tax incentives.
- Managing a portfolio of raw land and industrial real estate locations.
- Marketing the region to new investors.
- Bringing public and private partners together to support economic development.
- Leading and coordinating workforce development activities and internship programs with private and public partners.
- Hosting forum lunches and other networking and educational events.
- Creating publications to share information about our members and their communities.
- Coordinating with local school districts to introduce students to jobs in the traded sector industry through job fairs and other activities.
- Assisting local cities in writing proposals for Business Oregon to attract new businesses to the area.
- Partnering with SEDCOR Construction Alliance members to create competitive advantages for developers, companies and investors in the construction industry.

The SEDCOR team has had the opportunity to serve Yamhill County, City of Salem, Marion County and Polk County in the last five years. For all four contracts, staff spent significant time and energy building relationships and creating collaborative partnerships that strengthened the economic vitality in the region.

### YAMHILL COUNTY

During the past three years, SEDCOR staff reached out to traded sector companies, chambers of commerce, local city managers and administrators, county officials and private businesses in Yamhill County. Based on our trusted relationship, SEDCOR continues to work with Yamhill County companies after the formal contract expired on June 30. SEDCOR is currently working with five companies on economic development expansion.

As a result of the work done during the three-year contract, the following outcomes were achieved:

- Six expansion and recruitment projects with local companies and industrial sites.
- Forest River, based in Dallas, expanded to Sheridan, adding 200 FTE within two years.
- 50 companies were connected to workforce training, marketing support and business development incubators.
- 100 positions were filled through the quarterly Yamhill County Job Fair.
- School-to-Industry pipelines were strengthened, e.g. Innovate Dayton and Innovate Willamina.
- Increased recruitment opportunities for the West Valley Enterprise Zone.
- 150 people participated in the Economic Vitality Summits and multiple action groups.
- SEDCOR launched the Business Retention and Expansion program for the city of Yamhill.
- SEDCOR's magazine, newsletter and special events featured Yamhill County's work.
- SEDCOR provided economic development services to the city of Newberg and managed the Enterprise Zone for Sheridan.

### CITY OF SALEM

For 35 years, SEDCOR has worked with the city of Salem to develop industrial parks, assist companies with expansion efforts, recruit companies to Salem and serve as the lead organization for economic development activities. Recent successes include:

- Fairview Industrial Park and Mill Creek Corporate Center developed.
- NORPAC/Henningsen Cold Storage, Kettle Foods, Truitt Family Foods, Truitt Brothers, Don Pancho, Garmin and many more companies accessed local and state resources to expand their presence in the region.
- Recruited Home Depot Deployment Center, PacTrust, FedEx and Amazon to Mill Creek Corporate Center with city and state partners.

SEDCOR provides ongoing services for the City of Salem such as working with Business Oregon to submit proposals on the city's behalf, providing marketing and communications support through SEDCOR's quarterly magazine, monthly newsletter and luncheons, and special events, and assistance with speech writing and promotion at local,

national and international tradeshows to attract businesses to Salem. The City Manager for the City of Salem has a clear and open line of communication with SEDCOR and relies on the SEDCOR team for expertise and coordination with its economic development projects.

### MARION COUNTY

Marion County is a charter member of SEDCOR and has benefitted from the services SEDCOR provides for 35 years. Over the past year, SEDCOR has largely provided research for the Marion County Commissioners and worked to keep the County Commissioners apprised of changes within their borders and beyond. SEDCOR provides a quarterly report to the Commissioners and maintained a clear line of communication.

Examples of the deliverables for Marion County Commissioners include a Business Retention and Expansion Survey for Marion County; details on available industrial space and SEDCOR's strategy to build additional capacity; growth projections for companies and intelligence about those that have made significant investments in the region such as Hazelnut Growers of Oregon, PacTrust, Wilco, Henningsen Cold Storage, Littau Harvester, Turner Lumber, Wilcox Farms, Metal Innovations, Pro-Cure, Willamette Valley Pie, Forest River and Ulven Companies.

Each quarter, SEDCOR keeps Marion County Commissioners informed about trends and companies looking to move to Marion County. In addition, SEDCOR works with local school districts and career and technical education programs to strengthen the pipeline of applicants from schools to companies in Marion County. SEDCOR tracks metrics on a quarterly basis for Marion County, including new and active recruitments, new and active expansions, total number of companies recruited, retained and expanded, retained and new jobs, and capital expenditures.

Marion County benefits from the same methods of marketing and communications support that SEDCOR provides to the City of Salem, described above.

### POLK COUNTY

Polk County has been a strong supporter and partner since 1990. SEDCOR's main efforts have focused on bringing new industries to Polk County communities, working with economic directors from Independence, Dallas and Monmouth to expand local businesses and recruit new businesses to the region, and providing assistance on opportunities to leverage resources from Business Oregon and other grant opportunities. Polk County Commissioners appreciate the information they receive from SEDCOR and the actions that SEDCOR takes with their guidance on specific projects. Polk County benefits from the same marketing and communication support that SEDCOR provides to its other clients described above.

## Economic Development Services

Yamhill County has a diverse portfolio of companies representing a variety of sectors from fine wine and productive nurseries to world-class dental equipment and food processing companies. The traded-sector business leaders embody a pioneering spirit; they develop new markets and operate traditional natural resource companies. Companies such as Betty Lou's, Inc. and Cascade Steel Rolling Mill benefit from operating in a county that is internationally known for the wine industry. Economic development in Yamhill County is happening, but it needs coordination and access to additional resources in order to continue to grow.

With a full-time Business Retention and Expansion Manager serving and working in Yamhill County, SEDCOR will be able to coordinate what is happening at the community level, design an effective strategy for the County and leverage resources from the regional, state and federal levels.

Companies that make helicopters, textiles, food, wine, and manufacture products with metals have a range of issues that can impede their growth. SEDCOR staff will listen, learn and organize the information into a cohesive plan that communities across the Yamhill County can support.

With recent investments in infrastructure including the Newberg-Dundee bypass, Yamhill County is responding to the growth and positioning itself for the next wave of economic development. Consistent family wage jobs are needed along with a balance between the agricultural producers and the industrial manufacturers.

If given the opportunity to guide Yamhill County's economic development services, SEDCOR would serve all traded-sector businesses, regardless of whether they are members of SEDCOR. The Business Retention and Expansion Manager for Yamhill County and other SEDCOR staff will take a comprehensive approach to understanding the needs of the private sector and will develop strategies for addressing those needs.

### **Retain and expand traded sector businesses**

With any regional effort, whether it is between two towns or 10 cities, it is important to gather input from community and business leaders to develop the vision and define what success looks like. A first step in building Yamhill County's economic infrastructure is forming an Advisory Board, a group of people who are committed to the cause and vested in the outcomes that reflect a diverse set of perspectives. SEDCOR will recruit volunteers to serve on the Advisory Board and ensure representatives of public agencies and private enterprise are included. This Advisory Board can help to focus, refine and review potential Strategic Grants by Yamhill County. The proposed budget also includes tactical funding to help implement strategic objectives identified by the Advisory Board. While we don't want to presume to know what this board believes is important, there are some clear tactical priorities such as funding and supporting internship programs,

industry specific projects such as a wine initiative, or expanding the Innovate Oregon work.

Once an Advisory Board is formed, staff will meet with the leadership of each community to gather knowledge about the unique assets, opportunities and challenges for growth, and the inventory of available land, resources and current infrastructure. Staff will develop and maintain a database of the assets for each community and use the data to help cities or defined communities develop an economic development plan for their area. SEDCOR will encourage interested businesses to use the database to understand the communities within Yamhill County as well.

SEDCOR will strive to ensure local traded sector companies have the workforce they need within Yamhill County by aligning education and training opportunities with local business needs. Specifically, SEDCOR will assist Innovate Oregon in Yamhill County school districts by connecting local businesses to two annual events and recruit businesses to support Evergreen Aviation & Space Museum's AgTech Challenge and other career and technical education events. SEDCOR is supportive of the McMinnville WORKS program and is working with Incite and Chemeketa Community College to strengthen internship programs.

#### **Recruit traded sector businesses**

SEDCOR is well positioned to recruit traded sector businesses to Yamhill County because of the team's ongoing participation with Team Oregon Advanced Manufacturing, Team Oregon Food Processing and Oregon Economic Development Association. Staff will promote Yamhill County's assets among other economic development professionals to increase their understanding of Yamhill County's natural resource, employment and other traded sector assets. In addition, Chad Freeman regularly collaborates with partners on direct marketing efforts to site selectors and companies from other states and countries.

SEDCOR will leverage existing relationships to promote Yamhill County's assets at local, national and international tradeshows and assist other economic development partners throughout Yamhill County with introductions, meetings and data. We have provided a detailed list of recruitment work and outreach that will be a part of these efforts in the timeline. These will support key industries as well as international opportunities.

By developing and maintaining relationships with local brokers and land or building owners, SEDCOR will standardize and manage Yamhill County's inventory of available land and buildings so it is current. This information is critical for recruitment efforts and will be readily available when organizations like Business Oregon ask SEDCOR to submit proposals on behalf of Yamhill County.

**Identify and commit local resources to develop and support Yamhill County communities' economic development.**

By forming and facilitating a Yamhill County Advisory Board, SEDCOR will be able to coordinate efforts and launch action teams to achieve goals for countywide efforts. SEDCOR will leverage local, regional and state resources for the Advisory Board and train and manage action teams. SEDCOR will facilitate quarterly meetings and produce progress reports.

**Increase Yamhill County's marketability**

Yamhill County has some impressive workforce development initiatives. SEDCOR will market these efforts to state and national audiences. In addition, SEDCOR will promote Innovate Oregon's efforts in Yamhill County, create marketing material including information on business incentives, demographics and existing companies for each of the 10 cities, and provide updates to websites on economic development news including expansions and new businesses.

**Support entrepreneurs**

Entrepreneurs need access to mentors, resources and investors to successfully grow their businesses. SEDCOR will network entrepreneurs with existing services and experts in the region. SEDCOR will help the Chehalem Valley Innovation Accelerator connect with technology-focused businesses and host meet-ups to connect entrepreneurs with educational sessions and potential investors. SEDCOR will work to bring programs for entrepreneurs that have been developed by Oregon Entrepreneurs Network, Oregon Technology Business Center and TiE Oregon to Yamhill County.

The SEDCOR Business and Retention Expansion Manager for Yamhill County will work closely with SEDCOR President Chad Freeman to make quarterly reports to the Yamhill County Board of Commissioners. Staff will track their activities carefully and report on the following metrics:

- Number of company visits per quarter and yearly total.
- Number of jobs created per quarter and yearly total.
- Amount of investments per quarter and yearly total.
- The number of active recruitment projects and completed projects.
- Updates on defined goals and strategies.
- Other data requested by the Commissioners.
- Reports on the Advisory Committee.
- Generated media for Yamhill County and its businesses along with updates on communications materials and events.

**Proposed Staff**

If selected to provide Yamhill County's economic development services, SEDCOR will hire a full-time business retention and expansion manager dedicated solely to Yamhill County. SEDCOR President Chad Freeman will work jointly with county commissioners

to select the new staff member. All current SEDCOR staff members will provide support to Yamhill County's BR&E Manager, including training, providing introductions and contacts, organizing meetings, planning events, and assisting with marketing and communication needs. SEDCOR will aim to hire the BR&E Manager within 60 days of receiving the contract. Information about the current staff members is included in the Organization section. Resumes are included in the Appendix.

## Collaboration

Effective economic development requires public and private partnerships to successfully bring good paying jobs in the traded-sector industries to local communities. SEDCOR has a proven track record of working collaboratively with cities, counties, state agencies, nonprofit organizations and private businesses to promote economic vitality and stability throughout the Mid-Willamette Valley.

SEDCOR often serves as the liaison between private companies and public partners. The following examples demonstrate SEDCOR's collaborative approach:

**Forest River** contacted SEDCOR to assist them in expanding their business. SEDCOR listened to their needs and coordinated the effort between many partners including the City of Sheridan, Yamhill County, Governor Kate Brown's Mid-Valley Regional Solutions Team, PGE, Pacific Power, Mid-Willamette Valley Council of Governments and Business Oregon to help Forest River move to Sheridan in 2017. This is expected to create 200 jobs. Previously, SEDCOR worked with public and private partners when Forest River moved to Dallas in 1999, Independence in 2007 and Silverton in 2014.

SEDCOR assisted Business Oregon in recruiting **St. Cousair Oregon Orchards** to Newberg by introducing them to key public and private partners and sharing information on in-depth economic analysis about the region. The Japanese company merged with Berry Noir Co-Packing. All jobs were retained, 15 were added and the company plans to add 50 more. The merger will bring more Oregon products to international markets.

**PacTrust** is in the process of building the first two of six speculative buildings at Mill Creek Corporate Center. The investment provides much needed industrial space for companies looking to expand or locate to Salem. SEDCOR marketed the opportunity to PacTrust, led tours on the site, made sure the infrastructure was ready for construction and worked with the City of Salem and Oregon Department of Administrative Services to close the deal.

**Amazon** recently announced it is building a 1 million square foot logistics warehouse at Mill Creek Corporate Center in Salem, an investment valued at more than \$90 million. Amazon plans to hire more than 1,000 full-time employees. SEDCOR led the Amazon recruitment effort on behalf of the City of Salem and the State of Oregon.

**Henningsen Cold Storage** – A 93-year-old Oregon family-owned refrigerated warehousing company, Henningsen built a new 166,000 square foot cold storage facility in Salem that opened in 2017. The new facility will bring new jobs and serve as an innovative hub of activity for multiple food processing companies. SEDCOR partnered with Marion County, City of Salem, Business Oregon, Oregon Department of Administrative Services and PGE on the project.

**Wilco/Hazelnut Growers of Oregon** merged in 2016 and decided to build a new hazelnut processing plant and distribution facility in Donald. The new facility is slated to open in 2018, adding 50 new jobs. SEDCOR assisted Wilco with site selection and coordinated the effort between Marion County, Gov. Kate Brown’s Mid-Valley Regional Solutions Team, City of Donald, Council of Governments and Business Oregon to identify and obtain financing for the necessary infrastructure.

While there are many examples of SEDCOR’s ability to collaborate, this is only possible due to effective and trusted communication between SEDCOR and its public and private partners. SEDCOR currently has more than 350 members from the region and multiple partners. Businesses know SEDCOR is a reliable asset to help them achieve their objectives. SEDCOR staff communicate with 900 companies per year to ensure they have what they need to be successful in the region.

To effectively and efficiently communicate with Yamhill County Commissioners, city officials and various partners, SEDCOR will:

- Attend Yamhill County Commission meetings each quarter to present a progress report.
- Add Yamhill County representatives to serve as SEDCOR board members.
- Hire, train and support a new Business Retention and Expansion Manager to lead SEDCOR’s efforts in Yamhill County.
- Communicate with city officials at least once a month.
- Stay apprised of all city, school district and county public meetings to monitor community issues that impact economic development.
- Host networking meet-ups for people to discuss ideas and concerns.
- Work with chambers and tourism groups to refine their marketing materials to attract new businesses to the region.
- Host quarterly Advisory Board meetings.
- Have Roundtables for CEOs and specific industry groups to share ideas.
- Establish a new SEDCOR office in Yamhill County to make it easy to connect with economic development personnel.
- Work with the local media to inform people about the SEDCOR and Yamhill County partnership and provide guidance on how to contact SEDCOR for assistance.

## References

**Newberg Community Development Director Doug Rux** - *Phone: 503-537-1240*  
*Email: doug.rux@Newbergoregon.gov*

**Salem City Manager Steve Powers** - *Phone: 503-588-6255*  
*Email: spowers@cityofsalem.net*

**Marion County Commissioner Kevin Cameron** - *Phone: 503-588-5212*  
*Email: KCameron@co.marion.or.us*

## Licensure

A copy of SEDCOR's liability insurance is included in the Appendix.

## **Budget**

See insert of budget.

## **Funding**

SEDCOR has a long history of successfully working with state and federal agencies to manage grants. In 2013, SEDCOR was one of three recipients of three-year \$2 million Make it in the Willamette Valley federal grant. The grant allowed regional private and public partners to work together on three goals: grow manufacturing companies, assist companies with workforce, and contract with Oregon Manufacturing Extension Partnership to implement lean principals. In one case, OMEP assisted a metals manufacturing business in Yamhill County that was looking to expand. Instead of spending almost a \$1 million on renovating its building, the company spent \$300,000 to implement lean practices and saved \$700,000. SEDCOR introduced the company to OMEP.

In addition to the federal funding for economic development, SEDCOR worked directly with private partners, PGE and PacifiCorp as well as local governments to leverage additional dollars for the effort.

Going forward, SEDCOR will continue to look for opportunities to leverage resources from all available sources to support economic development in Yamhill County. SEDCOR is funded by private businesses and public partners. The SEDCOR team is experienced in managing contracts, grants and donations, both cash and in kind.

By working with SEDCOR, Yamhill County will benefit from SEDCOR's infrastructure, network, and expertise. SEDCOR has experience accessing the Governor's Strategic Reserve Fund, Business Expansion Program, Industry Opportunity Fund, Business Retention Services programs and Special Public Works, and many others. Dozens of companies have secured public and private funding through grants and other sources for needed projects, including infrastructure improvements and workforce training.

## **Additional Resource Allocation**

SEDCOR has extensive experience guiding counties with their strategic economic development grant programs. The SEDCOR team would advise the Yamhill County Commissioners to task the Economic Development Advisory Board to develop the goals, criteria and process for administering additional resources, such as the Oregon Video Lottery Reserves. SEDCOR criteria for these grant programs have typically included a focus on traded sector companies, leveraging investments, job creation, and key or emerging industries.

**SEDCOR'S Proposed budget for Yamhill County's RFP**

	YEAR 1	YEAR 2	EXTENSION YEAR 3	EXTENSION YEAR 4
<b>REVENUE</b>				
Yamhill County Contract for Services	\$ 147,200.00	\$ 146,810.00	\$ 150,000.00	\$ 150,000.00
SEDCOR	\$ 41,000.00	\$ 42,005.00	\$ 43,040.15	\$ 44,106.35
<b>Total Income</b>	\$ 188,200.00	\$ 188,815.00	\$ 193,040.15	\$ 194,106.35
<b>EXPENSES</b>				
<b>Project Personnel</b>				
Yamhill Business Retention Manager	\$ 87,000.00	\$ 89,610.00	\$ 92,800.00	\$ 92,800.00
Chad Freeman	\$ 13,500.00	\$ 13,905.00	\$ 14,322.15	\$ 14,751.81
Nick Harville	\$ 8,000.00	\$ 8,240.00	\$ 8,487.20	\$ 8,741.82
Tami Lundy	\$ 6,000.00	\$ 6,180.00	\$ 6,365.40	\$ 6,556.36
Kristine Thomas	\$ 5,000.00	\$ 5,180.00	\$ 5,365.40	\$ 5,556.36
<b>Total Project Personnel</b>	\$ 120,500.00	\$ 124,115.00	\$ 128,340.15	\$ 129,406.35
<b>Subcontracts</b>				
Yamhill Response Fund	\$ 35,000.00	\$ 35,000.00	\$ 35,000.00	\$ 35,000.00
Meeting Administration (forums etc)	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
<b>Total Subcontracts</b>	\$ 36,000.00	\$ 36,000.00	\$ 36,000.00	\$ 36,000.00
<b>Materials, Supplies and Equipment</b>				
Office Rent (Yamhill/ SEDCOR)	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00
Equipment	\$ 2,000.00	\$ 500.00	\$ 500.00	\$ 500.00
Marketing Materials	\$ 5,000.00	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00
Research Programs (Co-star, IBIS, CRM)	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Team Oregon Membership	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00
<b>Total Materials</b>	\$ 20,500.00	\$ 17,500.00	\$ 17,500.00	\$ 17,500.00
<b>Travel</b>				
Regional Travel	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Recruitment/ Site Selector Travel	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
<b>Total Travel</b>	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00
<b>Other Direct Costs</b>				
phone	\$ 600.00	\$ 600.00	\$ 600.00	\$ 600.00
office supplies	\$ 600.00	\$ 600.00	\$ 600.00	\$ 600.00
<b>Total Direct Cost</b>	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00
<b>TOTAL PROJECT EXPENSES</b>	\$ 188,200.00	\$ 188,815.00	\$ 193,040.15	\$ 194,106.35
<b>SEDCOR Match</b>				

## Budget Narrative

### Revenue

Yamhill County Contract for Services represents the contractual dollars for economic development within Yamhill County.

The revenue associated with the SEDCOR budget represents the cumulative estimated contribution from SEDCOR, which includes staff time, expertise, training, research programs, Team Oregon Membership, and travel and recruitment dollars, which support our work.

### Expenses

Project personnel includes resources to hire a Yamhill County Business Retention and Expansion Manager who will have the primary responsibility of working with Yamhill County to continue and expand the economic development work in Yamhill County. The dollars associated with existing SEDCOR employees support the contribution they will provide Yamhill County and the BR&E Manager.

### *Subcontracts*

In our work with counties as well as advisory boards, we have found that often these boards unearth problems and opportunities, which need resources to be solved. We propose this fund be available to the Yamhill Advisory Board to support their efforts to address problems and take advantage of opportunities. Other possible ideas include:

- Work for support a regional wine effort to continue to connect local wineries and wine growers to continue their growth.
- Implement work-force training programs, such as a countywide internship program to help connect employers with future workforce.
- Marketing efforts to continue to highlight both the work and the opportunities in the county, this could include a one-stop website to be developed.
- Support for the Innovate Yamhill efforts that are moving forward to connect technology with workforce.

### *Materials Supplies and Equipment*

The Yamhill County BR&E manager will have an office in Salem and a main office in Yamhill County, in order to have a day-to-day presence in the county.

Equipment includes computer and general office equipment, which are needed to continue to grow. This fund is expected to decrease as we move forward as we expect fewer capital expenses.

Marketing Materials budget is intended to help create and build marketing materials to supply communities with the materials they need to market the regional programs, connections as well as direct investment to market the county to prospective counties. Research programs budget represents programs that SEDCOR will supply to help understand key industries, the real estate community as well as tracking other resources.

SEDCOR is a key member of Team Oregon which is statewide economic development group working on key industries particularly food processing and manufacturing. This group works to help recruit and grow companies in this industry.

### *Travel*

This portion of the budget represents travel within the region. In the last three years working in the county, we have found that it is absolutely vital to be able to sit down face-to-face with both policy makers and companies to understand and proactively address opportunities. We have also included recruitment travel to make sure that we can access those business opportunities that are not in the region, such as trade shows focused on food/wine and manufacturing. In addition to this SEDCOR will attend shows beyond this as a part of our regular business. These shows include Site Selector Conferences, US Manufacturing shows, outreach to other countries. We typically market at six to eight of these events a year and will continue to market Yamhill County at these events. Other Direct Costs include costs for phones, office supplies etc. that are needed to work effectively.

### **Timeline**

Much of the work of economic development will be based on ongoing relationships and working individually with both companies and communities to implement effective plans to grow together. This includes identifying strategic opportunities that can be focused on and growing these together with our partners.

That being said there are some firm guidelines and markers for what we would like to accomplish to grow on the foundation that has been laid in Yamhill County. Our timelines are focused on a couple of key areas, Community Building Blocks, Recruitment, Expansion and Marketing. We have laid out these timelines below and look forward to adding to this.

### *Recruitment*

Below is the current itinerary for the work we are doing in the next 12 months. We look forward to continuing to work with Yamhill County on these global opportunities.

- January- Represent Yamhill County and the Region at the NW Food Processors Show.
- February- Work with California Food processors and manufacturers at the California Food Processors Show.
- March- Represent and market Yamhill County and the region at Natural Products Show in California.
- July- outreach to Site Selection professionals from across the United States.
- October- represent the region at the Doing Business in Oregon convention in Tokyo.
- November- Chicago Manufacturing Show (Fabtech) to help connect local manufacturers to global opportunities.

In addition to the recruitment outreach above SEDCOR also has engaged contractors to reach out across the US to connect with business interested in working in the region and connects directly with those interested firms.

The best recruitment strategy that we have found continues to be the ability to continue to work successfully with your existing customers. This is why at its core we believe any successful economic development program is based on a strong Retention and Expansion effort. Below are some of the metrics and guidelines we have found to be successful.

### *Retention/ Expansion/ Startup*

Within the first 90 Days of this contract SEDCOR expects to:

- Hire and introduce the new Business Retention and Expansion Manager.
- Work directly with ongoing projects in the region, including supply chain opportunities, outreach in Japan, as well as working to help projects that are moving forward.
- Sit down directly with 50 local firms to discuss work in Yamhill county, successes and areas of opportunities.
- Update SEDCOR's existing manufacturing database of traded sectors in the region.
- Bring the first educational event to Yamhill County.

Annually SEDCOR will:

- Bring at least four regional trainings a year to the community.
- Host Business roundtables to help connect business leaders with information and networks they need to be successful.
- Have at least 100 company visits to connect directly with Yamhill County firms.

### *Marketing*

The work of economic development requires an in depth understanding in order to convey the message effectively. In the first six months, we anticipate preparing:

- Key industry marketing pieces to highlight local strengths.
- Work with cities to create marketing material.
- Database of existing facilities that are available.
- Respond to state and local inquiries.
- Building an integrated marketing campaign to be implemented.

### *Community Building Blocks*

Meeting with local cities and helping to understand their strength and weaknesses as well as how they interact with firms to support jobs. It is our policy to work with communities wherever they are in their economic development work. That is that we know that some communities may want direct hands on economic development support, and others may want us to be more of a resource rather than a project lead.

To help with this in the first 90 days, we will:

- Meet with all the cities and tribes about how we can work together.
- Work with Yamhill County Commissioners create guidelines for Strategic Investment Fund.
- Identify County Advisory Board members and coordinate initial meeting.
- Host first quarterly debrief with commissioners to identify opportunities and how we can continue to grow this program.
- Work with the Counties Strategic Doing work to identify paths forward from this work.

Annually, we will:

- Meet with all communities directly to identify challenges and work to be done.
- Coordinate directly with Commissioners to ensure regular communication of projects work.



## **Appendix for Yamhill County RFP**

- **Attachment B - Proposal Submission Form**
- **SEDCOR's Certificate of Liability Insurance**
- **Resumes**
  - SEDCOR President Chad Freeman
  - BR&E Manager Nick Harville
  - Special Events/Manager Tami Lundy
  - Communications/Marketing Manager Kristine Thomas

Attachment B

Proposal Submission Form

I, the undersigned, having read and with full understanding of all Proposal specifications, terms and conditions, do submit the following Proposal to provide Yamhill County, Oregon with Economic Development Services and certify that the proposal is made without connection with any person, firm or corporation making a proposal for the same goods and/or services and is in all respects fair and without collusion or fraud.

Proposer's Printed Name: Chad Freeman
Proposer's Signature: [Handwritten Signature]
Company Name: SEDCOR
Address: 626 High St. NE, Suite 260, Salem OR 97301
Telephone Number: 503-837-1800
FAX Number: [Blank]
E-mail Address: cfreemon@sedcor.com

RESIDENT BIDDER CERTIFICATE

Pursuant to Compliance with Oregon Revised Statutes: "Resident Bidder" Certification:

[X] Yes, I certify that I am a "resident bidder."

(ORS 279A.120(b): "Resident bidder" means a bidder that has paid unemployment taxes or income taxes in this state during the 12 calendar months immediately preceding submission of the bid, has a business address in this state, and has stated in the bid whether the bidder is a "resident bidder" under this paragraph)

[ ] No, I am not a "resident bidder."

("Non-resident bidder" means a bidder who is not a "resident bidder" as defined in ORS 279A.120(a); please refer to the Oregon Revised Statutes regarding state requirements for Non-Resident Bidders that are awarded a contract in Oregon.)

I am domiciled in the State of \_\_\_\_\_

Indicate State



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
9/21/2017

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Maps Insurance 4625 Commercial St SE  Salem OR 97306	CONTACT NAME: Heather Bartell
	PHONE (A/C No, Ext): (503) 779-1850 FAX (A/C No): (503) 779-1854
	E-MAIL ADDRESS: hbartell@mapsinsurance.com
	INSURER(S) AFFORDING COVERAGE NAIC #
	INSURER A: Ohio Casualty Insurance Company
	INSURER B:
	INSURER C:
	INSURER D:
	INSURER E:
	INSURER F:

COVERAGES CERTIFICATE NUMBER: CL1762105124 REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:		BZ057861387	7/1/2017	7/1/2018	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 2,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000 Hired Auto \$ 2,000,000
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS					COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB DED RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input type="checkbox"/> N/A				PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
Operations of the named insured subject to policy terms, conditions and exclusions.

CERTIFICATE HOLDER  Yamhill County 535 NE 5th St McMinnville, OR 97128	CANCELLATION  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE  Heather Bartell / SHAN <i>Heather Bartell</i>

© 1988-2014 ACORD CORPORATION. All rights reserved.

Chad Freeman  
9832 SW 6<sup>th</sup> Avenue, Portland, Oregon 97301  
chdfmn@ortelco.net

## WORK EXPERIENCE

**President- Strategic Economic Development Corporation (SEDCOR)** (11/12-current)  
*Salem, Oregon*

President of lead economic development organization in Marion, Polk and Yamhill Counties. Responsibilities include organizational strategy and team management to meet recruitment and retention goals. In over three years the SEDCOR team has worked on projects which have resulted in over \$250 M in new capital in the region and work on projects resulting in over 2,500 new and retained jobs.

**Business Development Officer- State of Oregon** (1/09-10/12)  
*Portland, Oregon*

Led business recruitment and retention efforts in the Metro Portland region for the State of Oregon. This includes relationship management, coordination of complex projects, financing support for firms, working with state and local partners on projects of statewide economic importance. Successful projects include Vestas, IBM, Oregon Iron Works, and Novellus, representing hundreds of jobs in Oregon created and retained in Oregon.

**Executive Director- Training and Employment Consortium** (4/05-1/09)  
*John Day, Oregon*

Provided leadership for an organization responsible for providing workforce training throughout Eastern Oregon. This included financial control and management of over \$3m, including successful procurement, implementation, and monitoring of state and federal grants. Charged with implementing a strategic vision, managing and growing budgets, managing up to 70 employees, hiring, training, and developing new revenue opportunities.

**President- Eastern Oregon Workforce Solutions** (4/07-1/09)  
*John Day, Oregon*

Initiated, mobilized, and implemented strategy of forming a new 501(c)(3) organization focused on supporting economic development and private firms in Eastern Oregon. Included legal formation of the entity, fundraising, and generation of ongoing cash flow to support the organization.

**Grant County Economic Development Coordinator** (4/03-4/05)  
*John Day, Oregon*

Worked directly with a board of directors to successfully create, implement and capitalize on a strategic plan for economic development in rural Oregon. This included development, recruitment, and marketing of industrial park with city, county and state partners.

**Property Manager- Healthcare Realty Trust** (10/00-4/03)  
*Cheyenne, Wyoming*

Managed the leasing, operations, and client relationships of a new Medical Office Building. This included hiring and training management team, coordinating complex negotiations between owner and hospital, financial reporting, coordinating construction projects and incorporating additional assets.

**Acting General Manager- The Macerich Company** (3/98-9/00)  
*Santa Monica, California*

Held various management positions within the company with increasing responsibilities, including leading the team that incorporated the newly acquired flagship property into the portfolio. This included financial aspects associated with the \$32m budget, hiring and training new staff, negotiating new contracts, communication with new and existing tenants and contractors, transitioning of accounts payable and receivable, initiation of new projects, redevelopment plans, and day-to-day operations of regional shopping center.

## EDUCATION

**Masters of Business Administration**  
Colorado State University- (1/02-5/04)

**Bachelor of Science- Finance and Real Estate**  
Colorado State University- (8/93-12/97)

# Nick Harville

89 Sweden Circle, Silverton, Oregon 97381

Phone: 503-930-4609 E-Mail: nharville@sedcor.com

## Experience

### **Strategic Economic Development Corporation**

As Retention and Expansion Manager it is my responsibility to talk to members, large and small, from a variety of industries to help them resolve issues and concerns. Often times that is energy efficiency and energy improvements. My reputation in the Mid-Willamette Valley is exceptional. My knowledge of economic development organizations and industries is backed by 25 years of experience from the coast of Oregon to a variety of companies around the country.

Since coming to SEDCOR Nick has created the SEDCOR Construction Alliance, co-created the Industrial Maintenance Operator/Mechanic program (IMOM). IMOM identifies and documents the skill sets of high quality local employees. This IMOM information is used to encourage schools and other entities to teach local, industry-driven skill sets so individuals get locally hireable skills.

Nick has worked with school districts to utilize IMOM skills. To date four districts have re-instated vocational training in their schools and others have expanded and focused training.

### **FlexNet Development**

After establishing the economic development organization for Lincoln County, Oregon I began a private consulting career. Major accomplishments are helping to fund the start up and organize the Oregon Brewers Guild. Now one of the most respected craft brewing organizations in the world, I also helped do business analysis and planning for brewing operations around the US. I helped the State of Kentucky establish their strategic alliance program for economic development. It was those skills that also had me working in Morocco, Ireland, Canada and the UK.

My private consulting work exposed me to a variety of industries and companies. From food processing to manufacturing and health care. And more.

### **Lincoln County Economic Development Association**

With several years as Executive Director of a Lincoln County wide tourism organization the Lincoln County Board of Commissioners ask for support in increasing the county transient room tax by 1%. That meant that all entities outside the Urban Growth Boundaries of cities in the county would pay 1% more in transient room tax. Nick worked to gain support for the effort, 78% of the total revenue, being paid by one destination resort, Salishan.

Once the increase was passed, the Lincoln County Commissioner's made the decision to divide the revenue in half and provide equal amounts to tourism and economic development. The commissioner's once again turned to Nick Harville to put together a comprehensive, county-wide, economic development organization. This group would also be charged with administering Video Poker revenues.

## **Education**

**Economic Development Organization Management** – IEDC Certified class through University of Oklahoma - 2010

**Business Retention and Expansion Program Management** – IEDC Certified class through University of Oklahoma - 2010

**Strategic Planning for Economic Development** – IEDC Certified class through University of Oklahoma - 2010

**Sperry – Rand Sales Course and Xerox Sales Course**                      **1970-1981**

While working as a regional sales manager I took several different sales and marketing courses.

**Self-educated**

**On-going**

I am constantly reading new books on sales, marketing, market development, world markets, new ways of doing business and what effects change.

**Western Illinois University** – Business Management

**PROFESSIONAL EXPERIENCE**

**SEDCOR – Strategic Economic Development Corporation**

**September 1997 – Present**

*Executive Office*

- Plans monthly Executive Board Meetings and Board of Director Meetings through end-to-end event management (i.e. communication, catering, attendee registration, agenda creation and board minutes)
- Facilitates international travel arrangements and meeting coordination for President twice quarterly
- Hosts international delegate receptions through event management, agenda preparation and travel coordination
- Prepares annual \$750K budget with President for approval by Executive Board Members
- Organizes groundbreaking ceremonies / grand openings with community business leaders in the Marion and Polk Counties

*Office Manager & Administrator*

- Manages daily office operations reporting directly to the President
- Prepares bi-monthly membership communications by overseeing an active database of over 800 members
- Actively assists in membership marketing and recruitment by attending networking events and maintaining relationships with diverse business leaders in the Willamette Valley
- Manages accounts payable/receivable and payroll working directly with the Executive Board Treasurer

*Special Events Manager & Events Coordinator*

- Plans and supervises over 20 annual events, driving supplemental fundraising each year
  - Monthly Economic Business Forum Lunches
  - Quarterly Industrial Site Tours
  - Annual Gala, Honors Luncheon and Golf Tournament
- Chair of Events Committee – 25 members

**Oregon Economic Development Association**

**February 2007 – September 2011**

*Conference & Team Oregon Trade Show Event Planner*

- Conference Planner for 3 training conferences each year for over 300 attendees
- Works with Executive Board and Conference Committee to effectively plan training conferences
- Attends monthly Executive Board Meetings to maintain relationships and knowledge of association's activities
- Works with Team Oregon associates on international trade shows and prepares wire transfers for show booths

---

**EDUCATION**

**Georgia State University – Business Administration/Marketing**

**Graduated 1987**

# KRISTINE THOMAS

---

314 Charles Ave. | Silverton, OR 97381 | 971-282-3970 | kristinethomas10@gmail.com

## SUMMARY

An award winning and respected writer, editor and photographer with 30 years of experience in communications and marketing. A thoughtful yet decisive leader willing and capable of making decisions and resolving problems in a timely manner while maintaining a keen eye for detail. Known for being open minded, inquisitive, fair and considerate with a strong reputation for creating exceptional publications, writing engaging stories and working to continually improve communications.

## PROFESSIONAL EXPERIENCE

### Strategic Economic Development Corporation – March 2017 to present

#### Communication and Marketing Manager

Responsible for writing press releases, bi-monthly newsletter, annual report and quarterly magazine. Designed invites and materials for SEDCOR Golf Tournament and Annual Awards Luncheon. Write speeches and grants. Create and maintain marketing materials. Take photographs. Work with various public partners to write Request for Proposals to submit to Business Oregon. Maintain and post to social media sites. Manage and meet various deadlines. Write quarterly reports to be submitted to public partners.

### Our Town Newspaper 2004 – March 2017

#### Managing Editor

Responsible for planning content for a twice-monthly newspaper with a circulation of 10,000. Manage a staff of 10 freelance writers, identifying and assigning stories to reporters and photographers. Collaborated with the publisher/editor to expand the paper from once a month to twice a month. Write education, business, health, feature and investigative stories including photography. Partner with a graphic designer to create cover, layout paper and edit stories. Creatively solve problems as they occur from late breaking stories to advertisers wanting to put in a last minute ad.

### Freelance Writer – 2013 to present

Write social media content for two clients and freelance stories for other clients.

### The Oregonian 1998 – 2013

#### Freelance writer

Wrote both assigned and pitched stories for the South Metro and East Metro Bureaus. Additional stories featured in the Living and Business sections. Created environment and culture that allows people who are anxious about being interviewed to relax and enjoy sharing their story.

**About Face Magazine – September 2013 to February 2015** Writer/Copy editor

Interviewing people and writing stories; meeting deadlines; copy editing all the stories in the magazine

**The Gresham Outlook 1994 – 1998**

**Reporter**

Wrote health, science, business and political stories and served as education reporter for four school districts and a community college.

**The Clackamas Review 1993 – 1994**

**Editor**

Redesigned the paper, wrote and edited weekly news stories and worked in partnership with other reporters and photographers.

**The Roseburg News Review 1990 – 1993**

**Reporter**

Identified and wrote news and feature stories including the photography for a daily newspaper. Attended relevant city council and school board meetings.

**The Tab Newspaper 1988 – 1990 in Boston**

**Reporter**

Wrote news and feature stories for a weekly newspaper.

**Doremus Public Relations 1987 – 1988**

**Public Relations Coordinator**

Worked on and wrote for several campaigns and clients.

## **EDUCATION**

The University of Oregon – Eugene, OR

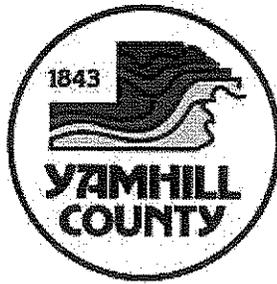
Bachelor of Science, double major in Journalism and Psychology in 1987

## **COMMUNITY INVOLVEMENT**

**North Willamette Habitat for Humanity** – Current Board Member

**Silverton High School** - Taught the Journalism class 2006 to 2008. Volunteered for various projects including Project Graduation, high school boys' basketball team and more.

**Silverton Area Community Aid** – Volunteer for annual events. Served as Board Member and Executive Assistant for this nonprofit organization providing food and financial assistance. Currently helping to organize and plan the annual fundraiser. Created short and long-term strategic plans to meet the growing number of clients visiting the food bank. Communicated with the community about the need for monetary and food donations by working with the local media, writing letters, using social media and speaking to civic organizations and schools. Wrote and filed monthly reports with the Marion-Polk Food Shares.



**Strategic Economic Development Corporation (SEDCOR)  
Quarterly Report to Yamhill County Board of Commissioners**

<b>Contractor:</b> SEDCOR	<b>Contract Amount:</b> \$294,010.00 (2018/19)
<b>Applicable Criteria:</b> Provide economic development services throughout Yamhill County as identified in Agreement for Services, Attachment A	<b>Grant Reporting Period:</b> <input type="checkbox"/> Quarter 1 <input type="checkbox"/> Quarter 2 <input type="checkbox"/> Quarter 3 <input type="checkbox"/> Quarter 4 <input type="checkbox"/> Quarter 5 <input type="checkbox"/> Quarter 6 <input type="checkbox"/> Quarter 7 <input type="checkbox"/> Quarter 8
<b>Report Completed By:</b>	<b>Anticipated Completion Date:</b> December 31, 2019
<p>This is a cumulative report. After initial submission, each reporting period narrative will be added to previously provided material.</p> <p><b>Milestones:</b> If a milestone has been amended, place a "N/A" next to the milestone and mark the amended box. Mark new milestones with an asterisk ("**")</p> <p><b>Activities:</b> Provide a brief narrative discussing activities associated with each milestone. If there was no activity during the reporting period, please explain what road blocks the project is experiencing and what is being done to complete the project in a timely fashion.</p>	
<b>Report Quarter 1 : March 2018</b>	
<b>Grant Milestones</b>	<b>Reported Activities</b> <span style="float: right;"><b>Check if amended</b> <input type="checkbox"/></span>
<ul style="list-style-type: none"> <li>• Hire BRE manager for Yamhill County</li> <li>• Establish SIF guidelines</li> <li>• Number of company visits</li> <li>• Number of jobs created</li> <li>• Amount of investments</li> <li>• Number of recruitment projects</li> <li>• Establish Advisory Committee and meet</li> <li>• Narrative project update</li> </ul>	Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Company Visits Q1: <input type="text"/> YTD: <input type="text"/> Jobs Created Q1: <input type="text"/> YTD: <input type="text"/> Investments Q1: <input type="text"/> YTD: <input type="text"/> Active Projects Q1: <input type="text"/> Completed Projects: <input type="text"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Enter text here

**Report Quarter 2 : June 2018**

**Grant Milestones**

**Reported Activities**

**Check if amended**

- Number of company visits
- Number of jobs created
- Amount of investments
- Number of recruitment projects
- Narrative project update

Yes  No

Company Visits Q1:  YTD:

Jobs Created Q1:  YTD:

Investments Q1:  YTD:

Active Projects Q1:  Completed Projects:

Enter text here

**Report Quarter 3 : September 2018**

**Grant Milestones**

**Reported Activities**

**Check if amended**

- Number of company visits
- Number of jobs created
- Amount of investments
- Number of recruitment projects
- Narrative project update

Company Visits Q1:  YTD:

Jobs Created Q1:  YTD:

Investments Q1:  YTD:

Active Projects Q1:  Completed Projects:

Enter text here

**Report Quarter 4 : December 2018**

**Grant Milestones**

**Reported Activities**

**Check if amended**

- Number of company visits
- Number of jobs created
- Amount of investments
- Number of recruitment projects
- Narrative project update

Company Visits Q4:  YTD:

Jobs Created Q4:  YTD:

Investments Q4:  YTD:

Active Projects Q4:  Completed Projects:

Enter text here

**Report Quarter 5 : March 2019**

**Grant Milestones**

**Reported Activities**

**Check if amended**

- Number of company visits
- Number of jobs created
- Amount of investments
- Number of recruitment projects
- Narrative project update

Company Visits Q5:  YTD:

Jobs Created Q5:  YTD:

Investments Q5:  YTD:

Active Projects Q5:  Completed Projects:

Enter text here

**Report Quarter 6 : June 2019**

**Grant Milestones**

**Reported Activities**

**Check if amended**

- Number of company visits
- Number of jobs created
- Amount of investments
- Number of recruitment projects
- Narrative project update

Company Visits Q6:  YTD:   
Jobs Created Q6:  YTD:   
Investments Q6:  YTD:   
Active Projects Q6:  Completed Projects:   
Enter text here

**Report Quarter 7 : September 2019**

**Grant Milestones**

**Reported Activities**

**Check if amended**

- Number of company visits
- Number of jobs created
- Amount of investments
- Number of recruitment projects
- Narrative project update

Company Visits Q7:  YTD:   
Jobs Created Q7:  YTD:   
Investments Q7:  YTD:   
Active Projects Q7:  Completed Projects:   
Enter text here

**Report Quarter 8 : December 2019**

Grant Milestones	Reported Activities	Check if amended <input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Number of company visits</li> <li>• Number of jobs created</li> <li>• Amount of investments</li> <li>• Number of recruitment projects</li> <li>• Narrative project update</li> </ul>	<p>Company Visits Q8: <input type="text"/> YTD: <input type="text"/></p> <p>Jobs Created Q8: <input type="text"/> YTD: <input type="text"/></p> <p>Investments Q8: <input type="text"/> YTD: <input type="text"/></p> <p>Active Projects Q8: <input type="text"/> Completed Projects: <input type="text"/></p> <p>Enter text here</p>	
<p>By submitting this report you certify it is true and accurate</p>		
<p><b>Certified by:</b></p>		<p><b>Submitted Date:</b></p>
<p><b>Reviewed by:</b></p>		<p><b>Date:</b></p>