**OREGON’S SMALL BUSINESS DEVELOPMENT CENTER LOCATIONS**

<table>
<thead>
<tr>
<th>College</th>
<th>Address</th>
<th>Phone</th>
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<tr>
<td>Blue Mountain Community College</td>
<td>2411 NW Carden Avenue</td>
<td>541-278-5833</td>
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<tr>
<td>Columbia Economic Team</td>
<td>375 S 18th Street</td>
<td>503-410-1061</td>
</tr>
<tr>
<td>Columbia Gorge Community College</td>
<td>400 E Scenic Drive, Suite 2.108</td>
<td>541-506-6121</td>
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<tr>
<td>Eastern Oregon University</td>
<td>1607 Gekeler Lane, Room 148</td>
<td>541-962-1532</td>
</tr>
<tr>
<td>Klamath Community College</td>
<td>803 Main Street, Suite 200</td>
<td>541-205-5404</td>
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<tr>
<td>Lane Community College</td>
<td>101 W 10th Avenue, Suite 304</td>
<td>541-463-6200</td>
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<tr>
<td>Linn-Benton Community College</td>
<td>6500 SW Pacific Boulevard, Willamette Hall 120</td>
<td>541-917-4929</td>
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<tr>
<td>Mt. Hood Community College</td>
<td>18633 SE Stark Street, Suite 301</td>
<td>503-491-7658</td>
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<tr>
<td>Oregon Coast Community College</td>
<td>3788 SE High School Drive</td>
<td>541-994-4166</td>
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<tr>
<td>Portland Community College</td>
<td>2305 SE 82nd Avenue, ADM 404</td>
<td>971-722-5080</td>
</tr>
<tr>
<td>Rogue Community College</td>
<td>3345 Redwood Highway, Building B</td>
<td>541-956-7494</td>
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<tr>
<td>Southern Oregon University</td>
<td>101 S Bartlett Street</td>
<td>541-552-8300</td>
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<tr>
<td>Southwestern Oregon Community College</td>
<td>1988 Newmark Avenue</td>
<td>541-888-7026</td>
</tr>
<tr>
<td>Tillamook Bay Community College</td>
<td>4506 Third Street</td>
<td>503-842-8222 ext. 1420</td>
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<tr>
<td>Treasure Valley Community College</td>
<td>650 College Boulevard</td>
<td>541-881-5772</td>
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<tr>
<td>Umpqua Community College</td>
<td>522 SE Washington Avenue</td>
<td>541-440-7824</td>
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<tr>
<td>Lead Office</td>
<td>1445 Willamette Street, Suite 5</td>
<td>541-463-5250</td>
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**OREGON’S SMALL BUSINESS DEVELOPMENT CENTER LOCATIONS**

The Oregon SBDC Network is funded in part through a Cooperative Agreement with the U.S. Small Business Administration, the Oregon Business Development Department, and other private and public partners, with Lane Community College serving as the Network’s lead host institution. Oregon SBDC services are extended to the public on a nondiscriminatory basis. Language services are available for limited English proficient individuals.
From the State Director

The Oregon Small Business Development Center Network is the front line and first call for business owners needing assistance. From startup to high growth, reinventing to innovating, the SBDC’s no-cost advising is confidential, and complemented by affordable training to the Oregon small business community. Our 20 regional centers and a Global Trade Center are the bridge between local, regional and statewide partners; host colleges and universities; and public agencies—connecting people, processes, products and services.

Our Centers consider the individual needs of each business when providing advice, guidance and instruction for long-term success. In addition to advising, the SBDC offers programs and services including training to support the growth of our clients at every stage of business. These programs include the Capital Access Team, Global Trade Center, Market Research Institute, Negocio en Español, Cybersecurity, Succession Planning, CCB Training, Small Business Management and QuickBooks Training.

Our Centers partner with local and regional organizations to ensure that our small business communities have access to the best resources available. These partnerships include identifying and aligning services for underrepresented communities that may not otherwise have access to affordable small business services.

Recovery and Post-Pandemic Support

After nearly two years of navigating the COVID-19 pandemic, the Oregon small business community is on the road to recovery. These recovery efforts have led to an opportunity for the Oregon SBDC to expand into Columbia County, through a partnership with the Columbia Economic Team, forming the 20th regional Small Business Development Center in the state of Oregon. Small business support services are greatly needed in Columbia County, and we look forward to providing assistance in 2022.

Our Centers have spent much of this past year helping clients revise business strategies, rethink the way they do business, capitalize, and innovate new services post-pandemic. Additionally, we’ve recalibrated our own strategies to provide timely and relevant support for business owners as they work to recover from the unprecedented challenges they’ve endured.

There’s no doubt that Oregon is home to some of the most resilient and innovative businesses in the country, and in the following pages you will hear stories from some of them. You’ll also learn about our services, our partnerships, our impact, and the indelible nature of the connections between the SBDCs and our communities. The work we do would not be possible without the partnerships of many, including our host organizations, Business Oregon, and the Small Business Administration.

Sincerely,

Mark Gregory, State Director
Oregon Small Business Development Center Network
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OREGON’S SBDC NETWORK
20 Regional Centers and 47 Locations to Connect with Businesses Across Oregon

The 20 regional Centers and Global Trade Center, with more than 47 locations across Oregon, serve local communities with local advisers and provide access to a statewide network of support.

The Centers are hosted by Oregon’s 17 community colleges, Eastern Oregon University, Southern Oregon University and the Columbia Economic Team. The Oregon SBDC Network is proudly hosted by Lane Community College and supports SBDCs across Oregon.

Five-Year Strategic Direction: 2022 Update

In 2019, the Oregon Small Business Development Center Network developed a five-year strategic plan, including new strategic directions to better serve Oregon businesses. For FY2022, our core strategies remain the same, with recalibrated goals that are clearly defined toward specific outcomes for the next year.

Enhancing Services
1. Focus on relevant, niche and collaborative service delivery with two primary goals:
   a. Develop guided pathways for training clients at each Center. Vision: Sustainable program and improved learning outcomes.

Strengthening Partnerships
2. Develop, strengthen and leverage partner relationships to expand communications and services to clients with two primary goals:
   a. Implement a partner tracking and referral system using existing tools. Vision: Improved partner communication and client engagement.

Assisting Underrepresented Businesses
3. Through a DEI, rural and socioeconomic lens, support underrepresented populations in the business communities we serve:
   a. Research representative demographics of each region/Center to analyze gaps of demographics of clients served compared with populations in the community; analyze bilingual capacities. Vision: Consistent support of underrepresented business populations statewide.
   b. Implement Oregon Inclusivity Project utilizing the Network's Inclusivity Project Framework. Vision: Increase the level of support for underserved business populations.

Improving Performance
4. Enhance competence and increase capacity to serve existing and future clients:
   a. Implement an onboarding process and provide an ongoing professional development system. Vision: Improved shared understanding about the Oregon SBDC to better support client engagement.

5. Continuously improve operations and systems to provide quality services:
   a. Evaluate current MIS systems, and identify unmet MIS and CRM needs. With data, research systems that meet the criteria for unmet needs. Vision: Improve internal SBDC systems to better meet the needs of staff and the clients we serve.

Network Hosted at Lane Community College

The Oregon SBDC Network was established in 1983 as our nation's first community college-hosted SBDC Network. The Network aligns firmly with the Lane Community College vision of transforming lives through learning, with the knowledge that advising, training and programs help serve all our business communities across Oregon. The Oregon SBDC Network, as a part of Lane Community College, is the largest provider of small business assistance in Oregon by both the number of clients served annually and the impacts we achieve.
Funding Partners

Oregon’s SBDCs are funded through a partnership with the Small Business Administration, Business Oregon and local host institutions. Additional funding comes from grants from local governments and private foundations and through income from training events and other program fees. Advising is always provided at no cost to clients, and classes are provided at a cost that allows them to remain both sustainable and affordable for business owners. Many Centers receive funding from local governments to provide classes to specific clients for free or at reduced costs to the client.

“The Oregon SBDC Network is an outstanding organization and is dedicated to Oregon’s small business community. I am particularly proud of the strong partnership that the Portland District Office and the Network have developed over the years. This partnership was invaluable as we faced together the challenge of helping small businesses survive the last 21 months of pandemic. The SBA asked even more from the SBDC Network and it delivered. Business advisers worked overtime to help Oregon small businesses respond to this crisis. I’m grateful to all of the Network directors and advisers for the help they provided.”

– Martin Golden, District Director,
Portland District Office,
U.S. Small Business Administration

“The Oregon SBDC Network has always been an important resource for small businesses in Oregon, but in the wake of the pandemic, we saw just how critical the Oregon SBDC is to the survival and growth of small businesses. The pandemic has tested our state, and the Oregon SBDC has stepped up by providing enhanced resources and expertise to small businesses in all corners of Oregon and has deliberately worked to reduce inequities through efforts to serve historically underrepresented small businesses. Business Oregon is eager to continue to build upon our strong partnership with the Oregon SBDC as we recover from the COVID-19 pandemic and equitably rebuild our economy.”

– Kate Sinner, Business Oregon,
Innovation and Entrepreneurship Manager

“Our Global Trade Team works very closely with the SBDC Global Trade Center to help educate and train companies interested in exporting or importing. Their staff is well-versed in international business and training programs, and this dovetails nicely with our consulting services, market development and grant programs. The Global Trade Center has brought many of my clients up to speed on exporting, establishing their business regionally, studying the option of marketing overseas, and preparing them for success. The partnership between the Center and our Global Trade Team is an excellent resource for Oregon businesses interested in strengthening their international strategies.”

– Alexa Byers, CGBP,
Global Trade Specialist,
Business Oregon
Small Business Is Big Business in Oregon

Every number shown on these graphs is a story all its own, and our advisers and clients have many. These numbers show a business that received capital to start or expand, an employee who joined a great local business and pursued a passion, a new business that started. These are the businesses that form the fabric of our community, that enrich our lives with culture, with personality and most importantly with passion. SBDCs are the local resource in and for the community, providing a helping hand and working with businesses to find their success.
**Clients Served**

5,906 clients were served by SBDCs across the state.

- Women: 3,192
- Hispanic: 838
- Minority Non-White/Hispanic: 1,350
- Veteran: 383
- Other: 143

**Training**

Across the state, SBDCs hosted 754 training events with a total of 9,267 attendees.

- Events: 754
- Attendees: 9,267

**Capital Formation**

$87,306,364 Oregon SBDC capital formation

- Number of deals: 270

- Willamette Valley: $19,158,193
- Portland Metro: $13,547,325
- Coast: $14,347,752
- Southern Oregon: $12,843,548
- Central Oregon: $22,365,287
- Eastern Oregon: $5,044,259

**Job Creation & Retention**

Across the state, SBDCs helped create 931 jobs and retain 2,005 jobs.

- Created: 67, 260, 499, 311, 94, 171, 82, 506, 95, 461, 94, 297
- Retained: 2,005

**Business Starts**

Statewide, SBDCs helped 365 businesses get started.

- Willamette Valley: 25
- Portland Metro: 30
- Coast: 17
- Southern Oregon: 31
- Central Oregon: 32
- Eastern Oregon: 230
SERVICES

Advising

Our knowledgeable advisers are here to help businesses with planning, analyzing cash flow, accessing capital, marketing, hiring and more. Clients learn from experienced advisers who bring important skills and perspectives to help businesses thrive. All advising is confidential and provided at no cost to clients.

Training

Learn the skills you need for a successful business. Experienced instructors teach classes on marketing, bookkeeping, human resources, business planning and other topics businesses need to master to be successful. In the classroom and online, business owners learn from one another as well as the instructor, developing important skills that lead to thriving businesses.

PROGRAMS

Capital Access Team

The Capital Access Team is a specialized team of advisers who focus on helping businesses access the capital needed to launch or grow a business. Advisers are often former lenders in the area who understand the local capital landscape and help businesses determine the best path forward.

Global Trade Center

It’s a big world. Sell to it. The Global Trade Center helps Oregon businesses connect to the global market by offering specific advising and training to succeed in these bigger international markets. Global Trade Center advising is available to all Oregon small businesses at no cost through their local SBDC.

Market Research Institute

The Market Research Institute provides actionable business intelligence to help small business owners make better strategic decisions. Using the latest business research tools, the Market Research Institute provides customized research reports to Oregon small businesses. These reports help businesses develop data-informed business and marketing plans, make location decisions, and more.

Cybersecurity

The Cybersecurity program offers educational awareness, training and no-cost one-on-one advising for businesses at different levels. Through collaborative partnerships with the Technology Association of Oregon and public agencies, the Cybersecurity program brings world-class resources in the field of cybersecurity and cyber intelligence to assist businesses.

IDEA
Determining Your Potential
LAUNCH
Launching into Opportunity
EXPANSION
Growing Your Business
RENEWAL
Adjusting to Change
EXIT
Preparing for the Next Stage
Small Business Management

A signature program of the Oregon SBDC Network, the Small Business Management program is a unique combination of instructional learning and one-on-one advising that helps make businesses more successful. During the up to three-year program, business owners learn how to run a successful small business while collaborating with peers. This program is available at most SBDCs.

Business Resiliency Planning

Emphasizing preparedness, Oregon’s SBDCs meet with business owners to help prepare for the worst before the worst happens. These steps include learning how to assess risk, implementing cybersecurity, succession planning, understanding supply chain risks, and preparing for natural and human-caused disruptions. Businesses receive tools for creating their own emergency response plans, communication plans and business impact analysis. Businesses are also encouraged to use financial planning and tools to mitigate risks. Disaster resilience planning is emphasized throughout most SBDC class curricula.

Disaster Response Assistance

SBDCs help small businesses recover from disasters throughout Oregon. This assistance can help with accessing local and federal resources, budgeting and cash flow, understanding state assistance programs and the needs of the whole business. Our advisers can help businesses assess their status, determine if and how they should reopen, access capital and put a recovery plan together.

All Centers are supported by the larger statewide Network and have access to specially trained advisers and resources. These services are also available in Spanish. Disaster assistance is provided in partnership with local communities, the SBA and Business Oregon.

Negocio en Español

Oregon’s Hispanic business owners are an important part of our local economies and communities. The SBDCs provide Business in Spanish assistance with Spanish-speaking advisers who are trusted members of their community. These advisers provide one-on-one advising at no cost, helping small business owners start and grow successful businesses.

CCB Licensing

In partnership with the Oregon Construction Contractors Board (CCB), SBDCs offer classes in person and online that meet the CCB’s required 16 hours of study before individuals are eligible to take the licensing exam. Additional advising and training are available to complete the CCB registration and start their business.

Succession Planning

Sometimes it can be difficult to leave a business that you have spent years creating. Our succession planning advisers help business owners create plans that can help make this process easier. These advisers have additional training to help businesses transition from one party to the next, whether it is a family member, an employee, or a third party.

Business Tools

GrowthWheel

GrowthWheel is a visual toolbox that helps business owners make better decisions and take action in their business. It’s offered free of charge exclusively to Oregon SBDC clients. The tool helps SBDC advisers and clients map business decisions and address challenges.

LivePlan

Created by Eugene-based Palo Alto Software, LivePlan simplifies business planning, budgeting, forecasting and performance tracking for small businesses. This advanced software is available at no cost for Oregon SBDC clients at participating Centers, and is often used in SBDC business plan trainings.

Bizminer

Bizminer provides industry statistical reports, including industry financial analysis benchmarks and industry trends. These reports are available at the national, local and zip code levels, making the tool an invaluable resource for industry research and business planning. Bizminer is accessible to business advisers and directors at each SBDC.
2021 CLIENT SUCCESS STORIES
Helping Build Oregon’s Best Businesses

Gaetano’s Market & Deli
Gaetano’s Market & Deli is an Italian-style deli on Oregon’s North Coast featuring Italian meats and cheeses, as well as an assortment of homemade pastas, sauces, sausages and lasagna. The idea for the deli came about during the pandemic, when siblings Rachel and Matthew Gaetano, along with Matthew’s wife, Julie, realized that they struggled to find the ingredients for their home-cooked Italian meals without a trip out of town.

The Gaetanos connected with the Clatsop SBDC, where they outlined the critical steps needed to put a business plan in place. With the assistance of an adviser, they completed market and customer research, used LivePlan to produce an initial financial forecast, participated in the Small Business Boot Camp, and completed the SBDC’s Small Business Management program.

The result was a highly strategic marketing plan that would prove to be more effective than they ever anticipated. When they opened in 2021, the Gaetanos capitalized on the considerable momentum and buzz they had generated on social media and promptly sold out of nearly everything in the store. The days, weeks and months that followed continued to validate their concept, as locals and tourists alike frequented Gaetano’s for fresh sandwiches for lunch and ready-to-cook meals for dinner.

“I cannot say enough about what a valuable resource the SBDC is to those looking to start a business or improve an existing business.”
– Rachel Gaetano, Gaetano’s Market & Deli
Oregon Coast SBDC

Oregon Coast

Nava Construction

Each year the Oregon Coast Community College Small Business Development Center picks a “Business of the Year” from the ranks of its Small Business Management (SBM) program. This year, the decision was tougher than most. Forty businesses—the largest group in the program’s history—participated in the SBM in 2020–21. Driven by concerns founded in COVID, and questions about the opportunities and challenges that will no doubt follow it, the group was varied, talented and driven to succeed against all odds in an unprecedented time.

Even among these shining stars, one shone especially bright. Nava Construction, based in Toledo, took home the Business of the Year honors. Though the Nava crew members have been working in Lincoln County since 2010, they formed their business in 2017.

“We started with a landscaping business,” said Brenda Nava, “and we kept getting requests for roof jobs, remodeling and fencing.” After enjoying these odd jobs, they realized they had an opportunity to pivot and transitioned to construction services in 2017.

Through guidance from the SBM program, the company was able to secure an SBA forgivable PPP loan and take advantage of the many resources available through the SBDC.

Brenda said the SBDC made them aware of programs and topics that could help them reach their business goals. “They not only help with information in running your business, but they are also there for any questions you may have and steer you toward programs that can help you,” she said.

Honey’s Bunkhouse

Deb Wessler had three ideas to complement her retirement in Baker City, Oregon: performing music, developing a business through her electrician’s background, or doing something with the extra room in her house.

When she connected with the Blue Mountain SBDC in November 2017, her business adviser shared that the city did not have enough beds to accommodate visitors during popular yearly events.

That was the start of Honey’s Bunkhouse, an authentic Western-style bunkhouse full of Old West charm, available to reserve through Airbnb.

Deb attended events and workshops as well as utilized software such as LivePlan offered through the SBDC and has turned her company from an idea into a thriving business. She recently purchased a historic building on Main Street to expand her operations.

The adviser “was 100% on target and has been a wonderful, local guide in my pathway through my third and most successful year in being an owner-operator of Honey’s Bunkhouse,” Deb said.
For the past 18 years, Cyndee Willis has owned and operated The Longhorn Saloon & Restaurant in the rural community of Bonanza, Oregon—population 464.

Cyndee was dealt a “one-two punch” when the private mortgage-holder on the property suddenly died at the height of the pandemic. She and her employees prepared for the worst as in-restaurant dining was closed by state mandate and the family of the deceased mortgage-holder was preparing to call the note on the mortgage.

Luckily, Cyndee found her way to the Klamath Community College SBDC, where she worked with an adviser to understand what would be required to build a summary business plan and loan package for the Longhorn. Her months of effort paid off when she accepted a loan through the South Central Oregon Economic Development District (SCOEDD).

Cyndee is proud to note that the business continues to be 100% woman-owned and fully committed to the town it operates in.

“This is a small community made up of hardworking farm people for the most part who have stood behind me through the years and especially through the COVID-19 pandemic,” she said. “We are here because of the support we offer to each other in this community. That is a powerful thing.”

Apland’s has built a reputation as the premier body shop expert in southern Oregon.

When they recognized the company’s need for a strategic plan to help manage their growth, Mike and Jodie discovered the Oregon SBDC Network through word of mouth from other successful local business owners about their positive experiences with the SBDC’s classes and advising.

Beginning with Rogue Community College SBDC’s intensive, nine-month Small Business Management program, Jodie and Mike have worked closely with SBDC advisers over the years to expand and improve their business. Most recently, in 2021, the SBDC advisory services provided financial analysis that was used to purchase real estate to build their newest facility.

“As with most things, the people make the difference,” Mike said. “The advisers at the SBDC are tireless and very knowledgeable about running successful businesses. No question goes unanswered.”

As the company has grown to 20 full-time staff members and cemented itself as an industry leader in Southern Oregon, the Oregon SBDC Network continues to work toward achieving further growth and helping the Aplands reach their short-term and long-term goals.

“The current business environment is more challenging than ever,” Jodie said. “I would highly recommend the Rogue SBDC to every business owner that wants a great strategic partner that will help them grow their business.”

The company has been a past winner of the Josephine County Chamber of Commerce Small Business of the Year award, as well as the Retailer of the Year award from Jackson County.
Grain Integrative Health

Grain Integrative Health is a successful naturopathic healthcare center providing a wide range of holistic and natural healing modalities that take patients’ individual needs into consideration.

Dr. Sara Kates-Chinoy and Dr. Lindsay Baum saw a need for providers in the community of Cascade Locks, where residents often had to travel to The Dalles or Portland to meet with a service provider. After receiving a grant from Business Oregon to set up the practice, Sara and Lindsay were introduced to the Columbia Gorge Community College SBDC, which provided additional support to satisfy the terms of the grant.

The SBDC worked to help the company prioritize and manage the work and reporting related to their grant funding, identify appropriate DEI training programs, and secure PPP and EIDL funding.

Grain Integrative Health has also taken advantage of the Columbia Gorge SBDC professional services program to get specialized training in grant-writing and has created new marketing assets through partnering with a local professional photographer and marketing team.

The Columbia Gorge SBDC has been a strong partner in helping Grain Integrative Health to identify, access and leverage local and national resources and support services to help them build and grow their healthcare center.

“As with most things, the people make the difference. The advisers at the SBDC are tireless and very knowledgeable about running successful businesses. No question goes unanswered.”

— Mike Apland, Apland’s Auto Body
NO COST, SMALL BUSINESS ADVISING

Helping Build Oregon’s Best Businesses

Small business advising is the backbone of every service provided by the Oregon SBDC, and the starting point for all clients. Our experienced business advisers support business owners at every stage—from idea to launch, expansion, renewal and exit strategy. They are with them every step of the way.

One of the most important roles our SBDC advisers play is problem-solver—helping business owners respond to challenges they face in all aspects of business. From accounting to hiring, sourcing to marketing, no business is immune to problems on its journey to success.

SBDC Advisers Help Business Owners:
- Identify the problem
- Discuss options and solutions
- Put together an action plan with next steps
- Provide accountability along the way
Advising can be done both in person or virtually.

Advising can be done both in person or virtually.

José Balcazar advises clients in Spanish.

In 2021, advisers spent nearly **21,000** hours contacting and preparing to meet with clients, and nearly **15,000** hours advising clients across Oregon.

Centers advised nearly **6,000** clients in 2021 with no-cost one-on-one advising. Approximately one in four clients will become “long-term” clients, defined as a client with more than five hours of advising or other services in a calendar year. Long-term clients are tracked for job creation and business growth during the year.
CCB TRAINING
Supporting Contractors

In partnership with the Oregon Construction Contractors Board (CCB), the Oregon SBDC has helped hundreds of aspiring contractors receive their contractors license and start their businesses. With the shortage of housing in Oregon and across the country, this sector remains a critical part of the economic development ecosystem. This program is providing licensed contractors to build the homes needed for our state.

SBDCs across the state offer classes in person and online that meet the CCB’s required 16 hours of study before individuals are eligible to take the licensing exam. Additional advising and training are available to complete the CCB registration and start their business. The program is offered in both English and Spanish.
OREGON'S HISPANIC BUSINESS OWNERS ARE AN IMPORTANT PART OF OUR LOCAL ECONOMIES AND COMMUNITIES. THE SBDCs PROVIDE BUSINESS IN SPANISH ASSISTANCE WITH SPANISH-SPEAKING ADVISERS WHO ARE TRUSTED MEMBERS OF THEIR COMMUNITY. THESE ADVISERS PROVIDE ONE-ON-ONE ADVISING AT NO COST, HELPING SMALL BUSINESS OWNERS START AND GROW SUCCESSFUL BUSINESSES.

THE OREGON SBDC HAS BEEN BUILDING ITS BASE OF BILINGUAL ADVISERS SPECIFICALLY TO SERVE THE SPANISH-SPEAKING BUSINESS COMMUNITY WITH CULTURALLY RELEVANT RESOURCES AND TO HELP THEM ACCESS CAPITAL, DEVELOP BUSINESS PLANS AND SHARE RESOURCES.

IN ADDITION, THE OREGON SBDC HAS LAUNCHED THE OREGON INCLUSIVITY PROJECT, WHICH WILL FOCUS ON PARTNERING WITH LOCAL ORGANIZATIONS TO BETTER SERVE UNDERREPRESENTED BUSINESS POPULATIONS REGIONALLY.
SUCCESSION PLANNING

Transitioning Business

Exit Planning Institute (EPI) estimates that some 4.5 million firms representing more than $10 trillion in business value will transition over the next decade. In a recent survey by EPI, 88% had no written plan to transition from the current owner. This lack of planning has caused many businesses to just liquidate assets instead of transitioning.

The Oregon SBDC sees this as an urgent call to assist business owners to prepare ahead in order to preserve wealth and maintain the critical services that businesses provide to their communities. In addition, with the lack of potential buyers, as baby boomers look to retirement, it will be imperative to build up internal leaders who will be the ones to step in the gap and take these businesses forward.

Sometimes it can be difficult to leave a business that you have spent years creating. Oregon SBDC succession planning advisers help business owners create plans that can help make this process easier. These advisers have additional training to help businesses transition from one party to the next, whether it is a family member, an employee, or a third party.
Cybersecurity has become a topic of discussion now more than ever as businesses become more digital and online-friendly. The Oregon SBDC’s Cybersecurity program, hosted at the Mt. Hood SBDC, offers educational awareness, workshops, training and no-cost, one-on-one advising sessions for businesses at different levels.

Through collaborative partnerships, the Oregon SBDC Cybersecurity program brings world-class expert presenters in the fields of cybersecurity and cyber intelligence for events, training sessions and webinars.

**The Mt. Hood SBDC provides services to businesses in the areas of:**

- Cybersecurity assessments
- Password protocol
- Multifactor authentication
- Data backups and updates
- Virtual private networks (VPNs)
- Employee training and permissions
- Website and social media security
- Internet of things (IoT)
CAPITAL ACCESS TEAM

Expert Advice and Guidance

Business owners seeking to deepen their financial knowledge and management skills are supported through the Oregon SBDC Network’s Capital Access Team (CAT).

Located across the state in six regional teams, CAT’s specialized advisers—many of whom are retired career bankers—provide entrepreneurs with expert advice on how to access capital to foster economic growth and resilience at all stages of business and across industries.

Following an online readiness assessment, the program prepares business owners for funding through services such as one-on-one guidance on business planning, developing a financial strategy, and assisting clients with funder relations and connections. The result is successful funding for about 75% of clients who complete CAT’s rigorous process.

In 2021, CAT supported SBDC clients through year two of the pandemic, helping with access to the SBA Restaurant Revitalization Fund and the SBA Shuttered Venue Operators Grant, and advising clients on the SBA EIDL loan increases.

In addition to pandemic-related funding support, CAT regional advisers from around the state reported seeing encouraging signs toward a slow return to pre-pandemic activity. In the latter half of the year, CAT saw an increase in requests for assistance with traditional loans, such as business starts seeking support with startup capital, and support for business acquisition deals.

CAT regional advisers have also been busy in 2021 assisting existing business owners with loan requests to purchase commercial real estate to better control their rent-related operating expenses and build business equity.

CAT has helped 2,573 small businesses in Oregon successfully access more than $255 million in capital since its founding in 2011.

Many CAT advisers are themselves former bankers who have previously been responsible for helping small businesses access capital. These experts, often in retirement, are giving back to their communities using their knowledge and skills.
Small businesses throughout the state are looking to secure international markets and business opportunities in an increasingly global economy. More than 89% of all Oregon exporters are small businesses, constituting more than 25% of the $55 billion in exports from Oregon in 2019.

Expanding can be an intimidating process for any business. The Global Trade Center’s specialized advisers help small businesses engage in international trade through all the 20 regional Centers located throughout Oregon.

Advisers work with the business and the Global Trade Center’s Certified Global Business Professional (CGBP) credentialed advisers. Together, they assist clients in determining the best path forward for the development of international markets and help to demystify the process of finding and realizing new opportunities abroad.

Since its inception in 2017, the Global Trade Center has helped 369 clients to access vital international trade resources. Businesses work with the Oregon SBDC Network’s various partners and trade agencies in an inclusive and comprehensive process to create consistent communication and develop actionable plans while accessing trade-specific resources and education.

This service is provided at no cost to the client.
Having the right data to make important decisions can mean the difference between success and failure for a business. Oregon SBDC’s Market Research Institute provides critical, individualized information about the market and business landscape for established Oregon small businesses anticipating growth.

Globally, businesses spent an estimated $73 billion on market research in 2019 to gain a deeper understanding of customers and competitors. Through professional research and actionable market intelligence, the Market Research Institute’s customized reports help small businesses gain a competitive edge. The team combines experience in research and data analysis with an understanding of business needs from SBDC Centers and advisers across Oregon. This process results in high-quality, customized research reports that support business goals.

The institute has access to a wide array of sources, including subscription databases like Mintel, as well as government and industry resources. Databases cover a wide range of topics, from insights into customer demographics and psychographics to industry trends and forecasts. Staff evaluate the quality and reliability of each data source and explain limitations.

Reports can support a wide range of business goals, including developing business and marketing plans, selecting a location, understanding the competitive landscape, and establishing financial benchmarking. In addition to careful research, analysis, and report development, the MRI staff work with each client and their adviser to understand the client’s business goals, ensure that reports are on target and provide expertise in interpreting the data in the reports.

The Market Research Institute’s customized research reports are available at every SBDC in Oregon at no cost to the client. Primary research is also available upon request when a deep dive into a niche area is necessary.

### 2021 Report Requests

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When disaster strikes, the Oregon SBDC Network is on the front lines to support small businesses in their most trying times.

With 20 regional Centers located in communities across Oregon, the Oregon SBDC assists with accessing federal resources, budgeting and cash flows, understanding state assistance programs, and the needs of the whole business during trying times.

Disaster response assistance services are also available in Spanish.

COVID-19 Response

In the second year of the COVID-19 pandemic, Oregon’s SBDCs continued to serve as the primary technical assistance provider for businesses across the state. Advisers worked tirelessly to assist the influx of businesses needing help understanding federal assistance programs and adapting to the ever-evolving health and economic conditions.

In 2021, the Oregon SBDC Network helped 140 clients secure more than $29.7 million through the Paycheck Protection Program (PPP) and Economic Injury Disaster Loans (EIDLs).

Business Resiliency Planning

The Oregon SBDC Network is dedicated to helping businesses prepare for disasters and provides training in a variety of formats on economic resiliency, disaster planning and succession planning.

Steps that businesses can take before disaster strikes include having accounting files backed up to cloud-based servers that can be accessed remotely in the event of a natural disaster, understanding supply chain risks, and preparing employees for emergencies. Centers also encourage businesses to prepare through proactive financial management in case of a disaster.

Unfortunately, disasters can happen anywhere, at any time. To help small businesses navigate how to proceed after a disaster, the Oregon SBDC Network has developed a Disaster Recovery Guide in partnership with the Vermont SBDC Network. The comprehensive guide can be used with an Oregon SBDC adviser, who can walk a business through the steps, but can also be completed individually.
OREGON INCLUSIVITY PROJECT

Expanding Services to Underrepresented Communities

The Oregon Inclusivity Project includes work to expand community partnerships, align services, identify underrepresented communities that need more assistance, and provide training and resources for SBDC advisers and staff. The project provides an opportunity to work more closely with local organizations serving underrepresented communities to bring services to businesses that might otherwise not receive them. This is a key Network initiative moving forward in 2022.

Key Project Initiatives:

- Develop partnerships that support growth and professional development with community-based organizations (CBOs) and respective alliance partners serving underrepresented business populations.
- Through CBO partnerships, expand technical assistance and professional development, share bilingual business resources, and provide culturally relevant advising techniques and resources that are shared among CBOs.
- Identify underrepresented market segments regionally as a key strategic focus area with annual goals specific to business services for those underserved target markets.
- Leverage the Oregon SBDC’s digital marketing channels and communication strategies to bring awareness of resources, services and solutions to business owners in underrepresented markets throughout the state of Oregon.
- Assess DEI training requirements for SBDC staff and engage additional DEI support training where practical for all SBDC staff and contracted advisers.
- Track the Network’s efforts with business clients and referrals to and from community-based organizations to assess impact throughout the state.
NEW REGIONAL CENTER

Now Serving Columbia County

In December, the Oregon SBDC announced that a new Center would be added in Columbia County. The Columbia County SBDC is Oregon’s 20th regional Center offering core business advising services and the first Center the Network has added since 2013.

The Columbia County SBDC will be a part of a newly formed Business Resource Center (BRC), co-locating small business advising with economic development, business retention, recruitment and expansion and tourism. As such, the Center and staff will have access to all programs, protocols, systems, training and software within the Oregon SBDC to augment its already considerable capacity. In addition, the new Columbia County SBDC director will collaborate with BRC partners to conduct outreach and client recruitment that will serve every community throughout Columbia County. The advising services provided will be consistent with the other Oregon SBDC offerings, which include—as mandated by the federal SBA—no-cost advising to any business.

“On the road to recovery from the COVID-19 pandemic, we know that the Columbia County SBDC is a much-needed and anticipated resource for local small business owners. With the new SBDC’s presence in Columbia County, there will be opportunities to expand and create new businesses and provide business support solutions for the many challenges Oregon’s small business communities face as they emerge from the pandemic in 2022.”

— Mark Gregory, State Director, Oregon SBDC
In 2021, the Oregon SBDC renewed its commitment to telling the story of the Network, encouraging each Center to share client successes; highlight regional and local impact; and better connect with clients, host institutions, partners, stakeholders and legislatures.

As part of a thorough and consistent marketing and communications plan, the Oregon SBDC is consistently utilizing social media, email marketing and the OregonSBDC.org website to deliver timely and relevant information across the state.

**Marketing Initiatives:**

- Creating a consistent and cohesive online footprint for the Oregon SBDC Network
- Improving the OregonSBDC.org website to offer a better experience and provide timely and relevant content for Oregon business owners to access
- Increasing statewide awareness of Oregon SBDC programs and services
- Increasing awareness of services in underrepresented communities
- Creating multilingual marketing collateral
- Communicating regularly regarding Oregon SBDC initiatives and impact
- Collaborating and sharing applicable partner information
- Providing content that can help business owners at every stage
Helping Build Oregon's Best Businesses

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