



Garden of Ink

Andrea's Mobile Dog Barber Shop



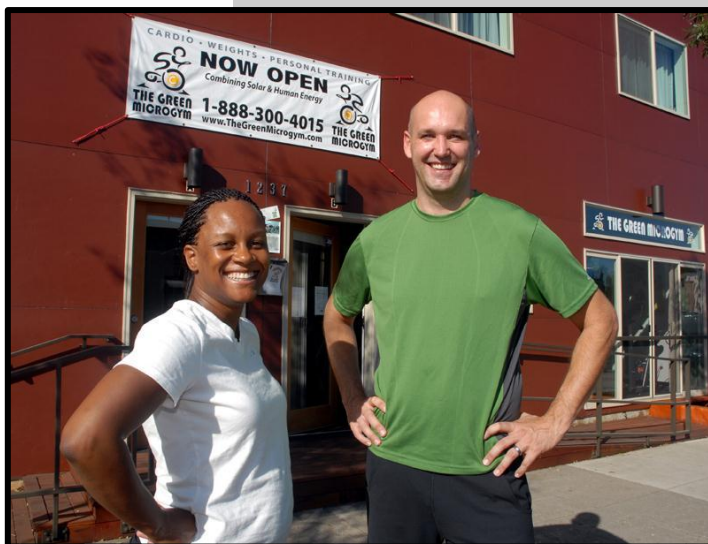
Sweet Skins

Oregon Microenterprise Network *2011-2012 Strategic Plan*



Longhorn Espresso

The Green Microgym



Background and Context

The Oregon Microenterprise Network Board and staff developed this plan. The Board and staff joined together for a one-day planning retreat in June 2010. The purpose of the retreat was to update the organization's Strategic Plan for the years 2011 and 2012, and, as part of that process, to consider a number of identified programming opportunities and challenges.

The 2009-2010 OMEN Board:

Shawn Winkler-Rios, eDev, Chair
Sanford Maddox, Microenterprise Services of Oregon, Secretary
Danny Crossman, Successful Business Management, LLC, Treasurer
Forrest Peck, MERIT
Jon Turino, Business Owner
Judith Olsen, Wells Fargo
John Saris, Oregon Business Development Department
Kathleen Flanagan, Confederated Tribes of the Umatilla Indian Reservation

OMEN Staff:

Valerie Plummer, Executive Director
Michael Gurton, MarketLink Program Director
Ryan McLaughlin, MarketLink Program Manager
Erica Cutler, Member Services Manager
Mary Wegmann, VISTA Team Leader
Margot Edmiston, Incoming VISTA Team Leader
Kelsey Quam, CapitalLink Loan Fund Associate
*Kathi Jaworski, OMEN Board Retreat Facilitator, *Write to Know* Consulting

A draft of this plan was presented at OMEN's annual Summit on Entrepreneurship in October 2010, and OMEN members have contributed their ideas, views and recommendations to the development of this plan.

This plan assumes dynamic, active implementation – that is, OMEN will consistently evaluate and improve our milestone goals and how we pursue them. Towards OMEN's mission and programmatic goals, implementation choices necessarily will allow the Board and management reasonable flexibility as experience informs our thinking and external events and circumstances shape our options, opportunities, and challenges.

Mission:

To increase opportunities for economically and geographically disadvantaged entrepreneurs by building the capacity and quality of Oregon microenterprise service providers

Vision:

Every entrepreneur in Oregon has access to resources and services for starting and growing businesses, and creating wealth, assets and economically vibrant communities

Values:

- OMEN values thriving **microenterprises as a central part of Oregon's economy**
- OMEN values **member input** and is a highly **inclusive, participatory and responsive** member-driven organization
- OMEN values **promotion** of the microenterprise field and its **pursuit of excellence, innovation and growth**. OMEN actively elevates the public profile of those in the microenterprise development and asset development fields
- OMEN values **accountability, integrity, and equity**, including balanced availability of statewide resources, and provision of services for historically underserved populations
- OMEN values **diversity** in its staff, board, leadership, and membership
- OMEN values the **positive impacts of its members' work**, and strengthens its members' capacity to develop thriving and economically viable entrepreneurs from start-up through growth and business expansion
- OMEN values the **interdependence** among, and the contribution of all effective economic development strategies, and believes that through **strong partnerships and collaborations**, we can have greater impacts

2011-2012 Outcomes

Performance: By 2013, OMEN will strengthen member performance to serve more entrepreneurs effectively, measured along a set of metrics ranging from outputs to impacts

Capacity: By 2013, build strong leaders in Oregon's microenterprise development field, and help OMEN members deepen service delivery and geographic reach

Coverage and Entrepreneurial Growth: By 2013, OMEN and its members will achieve statewide coverage, and OMEN will expand its capital access and market research programs to help entrepreneurs achieve significant and measurable business growth

Policy and Branding: By 2013, microenterprise development organizations will be favored providers across a wide array of federal, state, and local policies; OMEN will build the microenterprise development brand in and outside the MDO industry; By 2013 MDOs will be a widely known and respected industry in Oregon, distinguished by its steady, positive financial performance, economic value and civic returns.

2011-2012 Strategic Plan Goals

Goal #1: Strengthening Our Members and the Field through Five Strategic Initiatives:

1. Member Training and Development
2. Capacity Building: Asset Building Corps
3. Access to Markets: MarketLink
4. Access to Capital: CapitalLink
5. Data and Performance Tracking/Advocacy/Funding for the Field

Goal #2: Strengthen OMEN's Internal Capacity to Meet Mission and Service Goals

1. Financial Capacity
2. Administrative Capacity
3. Board and Governance

The Oregon Microenterprise Network (OMEN) is a statewide association of microenterprise development programs and their supporters. OMEN is governed by its members, ensuring that everything it does serves the interests of the membership. Its primary market is member microenterprise development organizations (MDOs). Its primary source of knowledge and expertise is its members, supplemented by its unique perspective across the sector through interactions with non-member MDOs in Oregon and other states, investors, funders, policymakers, media, entrepreneurs, and others stakeholders.

OMEN's primary responsibility is to provide products and services to member MDOs to aid them in their work toward our shared mission and in line with OMEN's core values. OMEN's products and services include training, consulting, financing, market research, technical assistance, publications, data collection and advocacy. OMEN is committed to providing the broadest possible mix of high-value, high-quality products and services.

OMEN's membership includes all types of MDO structures, including stand-alone non-profit organizations, Small Business Development Centers, financial institutions and loan funds, Chambers of Commerce, and others.

OMEN has played – and expects to continue to play – a leadership role that reaches beyond its membership, as this strategic plan details. In that role, OMEN has collaborated productively with other leaders in and around the microenterprise development, small business development, and asset development industries. These relationships represent another branch of the OMEN network, and serves to enrich its work in service to its members.

This strategic plan outlines how OMEN intends to meet its primary and related responsibilities as it pursues its core purpose of increasing opportunities for underserved entrepreneurs in Oregon. That is, it articulates a strategy in which OMEN is both a service provider and a leader in the microenterprise development field both in Oregon and beyond.

Goal #1: Strengthening the Field

Strategic Initiative #1

Member Training and Development

Objective 1: Create opportunity for skill development of MDO practitioners by providing best practices training to MDOs statewide.

2011 Performance Indicator #1: Increase attendance at the Oregon Summit on Entrepreneurship by 10% with statewide representation of practitioners compared to 2010 Summit attendance.	2012 Performance Indicator #1: Increase attendance at the Oregon Summit on Entrepreneurship by 15% with statewide representation of practitioners compared to 2011 Summit attendance.
2011 Performance Indicator #2: Provide at least two (2) full scholarships for MDO practitioners in rural areas to attend Summit.	2012 Performance Indicator #2: Provide at least two (2) full scholarships for MDO practitioners in rural areas to attend Summit.
2011 Performance Indicator #3: Conduct in-person Microenterprise Boot Camp training to provide overview of microenterprise development. At least 20 MDOs participate.	2012 Performance Indicator #3: Conduct two (2) webinar trainings throughout year. At least 25 MDOs participate.
2011 Performance Indicator #4: Explore feasibility of OMEN member certification process	2012 Performance Indicator #5: If determined feasible in 2011, begin voluntary certification process for OMEN membership

Objective 2: Foster maturing of MDOs at all stages of development.

2011 Performance Indicator #1: Research and develop implementation plan for peer mentoring program by matching mature MDOs with emerging MDOs. Consider partnership with Oregon Opportunity Network (Oregon ON) for peer mentoring program.	2012 Performance Indicator #2: Implement peer mentoring program. At least three (3) mentoring relationships exist by the end of 2012.
2011 Performance Indicator #2: Track MDO growth and maturation based on number of clients served, types of services provided, business outcomes (jobs created, forward business stage progression, annual business sales and profit information) and increases in organizational operating budgets	2012 Performance Indicator #2: Track data points from 2011 and measure longitudinal growth and change.

Objective 3: Increase statewide availability of services to all entrepreneurs through training specific to all stages of MDO development.

<p>2011 Performance Indicator #1: OMEN develops membership categories based upon stages of member development to improve targeted services to MDOs at all stages of growth. All current members are categorized by end of 2011.</p>	<p>2012 Performance Indicator #1: OMEN develops plan for tracking MDO growth via membership categories. OMEN implements training programs at all stages of development. At least forty (40) MDOs participate in development program and OMEN provides at least one (1) training for each member category.</p>
---	---

Objective 4: Increase membership renewal rates (member retention) and tracking of membership renewal as indicator of member satisfaction

<p>2011 Performance Indicator #1: At least 75% of OMEN members renew membership.</p>	<p>2012 Performance Indicator #1: At least 75% of OMEN member renew membership.</p>
<p>2011 Performance Indicator #2: OMEN conducts annual membership satisfaction survey. At least thirty (30) organizations participate with at least 85% member satisfaction reported.</p>	<p>2012 Performance Indicator #2: OMEN conducts annual membership satisfaction survey. At least forty (40) organizations participate with at least 90% member satisfaction reported.</p>

Objective 5: New member outreach and Strategic Partnership Development

<p>2011 Performance Indicator #1: Outreach to Association of Oregon Counties; Oregon Small Business Development Center Network; Oregon Opportunity Network; Oregon Entrepreneurs Network; WorkSystems Inc.; Oregon Economic Development Association; Association for Enterprise Opportunity, Portland Business Alliance, Economic Development Districts</p>	<p>2012 Performance Indicator #1: OMEN increased membership by 25% compared to 2011 membership</p>
---	--

Strategic Initiative 2:

Capacity Building: Asset Building Corps

Objective 1: Raise awareness of OMEN through the VISTA Asset Building Corps program.

2011 Performance Indicator: Conduct two (2) informational sessions to raise awareness of the OMEN Asset Building Corps program in order to increase the number of host site applications by 760%, which are rural.	2012 Performance Indicator: Conduct 2 informational sessions (urban, rural and Summit) about the OABC program to increase number of rural host site applications by 30% when compared to 2011 applicants.
--	---

Objective 2: Build Capacity at OMEN member organizations through development of new programs and funding.

2011 Performance Indicator: VISTA sites will increase their programming (measured by number of services offered, geographic scope, and clients served) by 10%	2012 Performance Indicator: VISTA sites will increase their programming (measured by number of services offered, geographic scope, and clients served) by 15%
2011 Performance Indicator: VISTA sites will increase their funding by 10%	2012 Performance Indicator: VISTA sites will increase their funding by 15%

Objective 3: Build cohesive and effective VISTA team annually through trainings and networking opportunities.

2011 Performance Indicator #1: OMEN will implement on-site visits and regular phone check-ins with each site.	2012 Performance Indicator #1: OMEN will coordinate a minimum of two (2) trainings for OABC team members throughout year.
2011 Performance Indicator #2: OMEN will coordinate a mid-year training, and OMEN member VISTA host sites will retain at least 80% of VISTA members.	2012 Performance Indicator #2: OMEN member VISTA host sites will retain at least 90% of VISTA members

Objective 4: Build strong leaders in the Microenterprise and Asset Building fields.

2011 Performance Indicator #1: At least 25% of VISTA team members will remain in Oregon microenterprise development and asset development organizations after their VISTA term	2012 Performance Indicator: At least 30% of VISTA team members will remain in Oregon microenterprise development and asset development organizations after their VISTA term
---	--

Strategic Initiative 3:

Access to Markets: MarketLink

Objective 1: Expand MarketLink's capacity to deliver services to microentrepreneurs throughout Oregon

2011 Performance Indicator: Outreach to practitioners in 100% of Oregon counties (36)	2012 Performance Indicator: Partnered with practitioners in 85% Oregon counties
---	---

Objective 2: Develop MarketLink as primary provider of economic gardening and market research in Oregon, and reach financial sustainability for MarketLink.

2011 Performance Indicator #2: Present MarketLink best practices at one economic development conference	2012 Performance Indicator #2: Present at two economic development conferences.
2011 Performance Indicator #1: Perform research for pricing models and set target for financial self-sufficiency	2012 Performance Indicator #1: Achieve sustainability through multi-year funding and contracts for MarketLink program.

Objective 3: Offer high quality market research to clients throughout Oregon to support sustainable partnerships with OMEN's members.

2011 Performance Indicator#1: Receive 90% satisfaction feedback from statewide partners.	2012 Performance Indicator #1: Maintain existing statewide partnerships, indicated by demand in queries being maintained or increased for existing partners.
2011 Performance Indicate #2: Achieve continuity or increase in number of queries per partner.	2012 Performance Indicator #2: Solidify four (4) new partnerships with each partnership generating four (4) queries per year.

Objective 4: Effect positive outcomes for MarketLink clients.

2011 Performance Indicator: Increase rate of business stage progression to at least 50%	2012 Performance Indicator: Increase rate of business stage progression to 75%
---	--

Objective 5: Provide MarketLink "Toolkit" consulting for a fee to out of state partners.

2011 Performance Indicator #1: Develop fee structure that enables scalability and profitability	2012 Performance Indicator #1: Double number of consulting projects with out of state practitioners
2011 Performance Indicator #2: Create a pilot project with national practitioner to achieve scale	2012 Performance Indicator #2: Receive feedback that demonstrates client satisfaction

Objective 6: Develop targeted services structure for microenterprise research services to increase practitioner satisfaction

2011 Performance Indicator #1: Develop a tiered structure of service offerings to ensure that entrepreneurs receive research matching their information needs.	2012 Performance Indicator#1: Inaugurate an equitable fee structure for all services
--	--

Objective 7: Receive high rate of quality feedback from clients regarding outcomes.

2011 Performance Indicator #1: Develop processes to ensure higher survey completion and achieve at least 50% survey completion	2012 Performance Indicator #1: Achieve 75% survey completion, and institute systems to aid practitioners with low levels of client survey completion
--	--

Strategic Initiative 4:

Access to Capital: CapitalLink

Objective 1: Provide access to capital for rural microenterprise development organizations and entrepreneurs.

2011 Performance Indicator: Partner with at least 9 OMEN members and local stakeholders to help them access CapitalLink loans for clients, covering at least 18 Oregon counties	2012 Performance Indicator: Provide at least one training to new CapitalLink partners on accessing the program
---	--

Objective 2: Optimize program capacity with appropriate staffing levels.

2011 Performance Indicator: Hire staffing of at least 0.5 FTE for CapitalLink program	2012 Performance Indicator: Assess program performance and consider outside partners to manage program
---	--

Objective 3: Reach target market to increase Oregon’s capital access availability

2011 Performance Indicator: Ensure at least 80% of borrowers are in rural communities with household income of 80% or below AMI	2012 Performance Indicator: Increase the number of female borrowers by 25%
---	--

Objective 4: Ensure any program losses are covered by reserves

2011 Performance Indicator: Garner Loan Loss Reserve funds of at least 15% of total portfolio	2012 Performance Indicator: Maintain Loan Loss Reserve of at least 15% of total portfolio
---	---

Strategic Initiative 5:

Data and Performance Tracking/Advocacy/Funding for the Field

Data and Performance Tracking

Objective 1: Build member capacity to track performance data

2011 Performance Indicator #1: Explore creation of data collection “Learning Cluster” among OMEN members	2012 Performance Indicator #1: Provide Data Collection Training to OMEN members, including access to one-on-one training support.
--	---

Objective 2: Collect and analyze member performance data across OMEN member programs, including longitudinal tracking of member data.

2011 Performance Indicator #1: Conduct Annual Member Data Collection Survey. At least forty (40) OMEN members participate.	2012 Performance Indicator #1: Conduct Annual Member Data Collection Survey and publish longitudinal member data
--	--

Advocacy and Communications

Objective 1: Create greater public awareness of the impact of microenterprises and microenterprise development service providers

2011 Performance Indicator #1: Advocate to Oregon State Legislature and key Departments and stakeholders (Oregon Business Development Department, Oregon Housing and Community Development, Employment Department, Governor’s Office, Economic Development Commission) on collective impact of OMEN membership	2012 Performance Indicator #1: Advocate to Oregon State Legislature and key Departments and stakeholders (Oregon Business Development Department, Oregon Housing and Community Development, Employment Department, Governor’s Office, Economic Development Commission) on collective impact of OMEN membership
2011 Performance Indicator #2: Advocate to federal stakeholders (Small Business Administration, Department	2012 Performance Indicator #2: Advocate to federal stakeholders (Small Business Administration, Department of

of Agriculture, US Treasury, Department of Commerce) on economic impact of microenterprise development	Agriculture, US Treasury, Department of Commerce) on economic impact of microenterprise development
2011 Performance Indicator #3: OMEN produces bi-annual newsletter to promote Asset Building Corps program to current and potential stakeholders.	2012 Performance Indicator #3: OMEN produces bi-annual newsletter to promote Asset Building Corps program to current and potential stakeholders.
2011 Performance Indicator #4: OMEN develops an organization-wide plan outlining all major communication points with members, board, funders and other stakeholders throughout year.	2012 Performance Indicator #4: OMEN produces at least quarterly press releases to increase media and public awareness of OMEN member impact
2011 Performance Indicator #5: OMEN distributes press releases on a quarterly basis. At least two press releases per year are published.	2012 Performance Indicator #5: OMEN evaluates organization-wide plan outlining all major communication points with members, board, funders and other stakeholders throughout year.

Objective 2: Branding campaign for the field and OMEN programs

2011 Performance Indicator: Identify and hire consultant to standardize design of OMEN collateral materials (letterhead, brochures, website, etc.) and update logo and branding for organization.	2012 Performance Indicator: Develop OMEN member subcommittee regarding branding for the field in Oregon with input from OMEN's Board of Directors.
---	--

Funding for the Field

Objective 1: Expand the resource base for microenterprise development services.

2011 Performance Indicator: Advocate for increased funding from existing sources for the Oregon microenterprise field (CDBG, State Lottery funding, SBA PRIME funding) resulting in at least \$300,000 of new funding available to OMEN members	2012 Performance Indicator: Usher through at least 2 new funding sources to the Oregon microenterprise field (National foundations, new federal or state funding sources)
---	---

Goal #2: Strengthen OMEN's Internal Capacity to Meet Mission and Service Goals

Financial Capacity Objectives:

Objective 1: Garner sufficient funding to sustain OMEN and to deliver on its mission and service goals

2011 Performance Indicator: Garner two (2) new funding sources for each of OMEN's Strategic Initiatives.	2012 Performance Indicator: Increase and sustain organizational revenues to \$500,000 annually.
--	---

Objective 2: Increase resource base for organization and increase diversity of funding sources

2011 Performance Indicator #1: Explore feasibility of individual donor campaign.	2012 Performance Indicator #1: If individual donor campaign determined feasible in 2011, OMEN conducts two donor outreach events. Individual donor campaign includes at least fifteen (15) individual donors.
2011 Performance Indicator #2: Ensure continued funding diversity among contract revenue, private foundation grants, federal contracts, state contracts and local contracts	2012 Performance Indicator #2: Increase funding diversity among funding sources including at least one new multi-year funding source

Objective 3: Maintain strong and transparent financial management practices

2011 Performance Indicator #1: OMEN receives clean audit. OMEN adopts auditor-approved fiscal policies	2012 Performance Indicator #1: OMEN receives clean audit and continues to adhere to fiscal policies and procedures.
2011 Performance Indicator #2: To increase financial transparency, OMEN posts audited financial statements and 990 on website.	2012 Performance Indicator #2: OMEN demonstrates connection between organization's finances and impacts/outcomes on website.

Administrative Capacity Objectives

Objective 1: Build staffing capacity to ensure OMEN's mission and goals are met

2011 Performance Indicator: OMEN seeks funding to increase staffing capacity to 5 FTE (excluding VISTA Leader).	2012 Performance Indicator: OMEN maintains or increases staffing capacity
---	---

Objective 2: Invest in quality staffing by continuing to provide opportunities for professional development

2011 Performance Indicator #1: OMEN provides professional development opportunities for staff on a regular basis.	2012 Performance Indicator #1: Review staff structure and clarify roles and responsibilities and ensure that there is adequate staffing at all levels
2011 Performance Indicator #2: 50% of OMEN full-time staff attends national AEO conference or similar national training.	2012 Performance Indicator #2: OMEN provides professional development opportunities for staff on a regular basis.
2011 Performance Indicator #3: OMEN conducts 360 degree staff assessment and one-day leadership development training for all staff.	2012 Performance Indicator #3: All OMEN full-time staff attend national AEO conference or similar national training
2011 Performance Indicator #4: All OMEN staff develop a Professional Development Plan for 2012	2012 Performance Indicator #4: OMEN conducts 360 degree staff assessment and one-day leadership development training for all staff.

Objective 3: Explore ways to build the next generation of leaders for OMEN (Board, staffing, and field)

2011 Performance Indicator #1: OMEN promotes VISTA Leader position within current VISTA team to develop leaders from within OMEN's VISTA Corps.	2012 Performance Indicator #2: OMEN Board Vice-Chair is prepared to move into Board Chair role
2011 Performance Indicator #2: OMEN has succession plan in place for Executive Director by end of 2011	2012 Performance Indicator #2: OMEN has succession plan in place for all staff by end of 2012

Objective 4: Achieve ongoing internal clarity on staff roles for programs

2011 Performance Indicator: Program staff for each department creates program-specific work-flow charts to clarify staff roles for each program. Staffing gaps/needs are identified.	2012 Performance Indicator: Revisit staff job descriptions to ensure appropriate roles and responsibilities are in place
--	--

Board and Governance Objectives

Objective 1: Develop a dynamic, active and strategically-thinking Board of Directors

2011 Performance Indicator #1: OMEN Board has 100% participating in giving to organization.	2012 Performance Indicator #1: OMEN Board participates in OMEN's individual giving campaign by identifying new individual donors
2011 Performance Indicator #1: All board members are actively serving on at least two committees. Board committee chairs regularly conduct committee meetings (at least four times per year or more).	2012 Performance Indicator #1: OMEN Board members participate in 2012 Board Retreat to develop 2013-2014 OMEN Strategic Plan

Objective 2: Grow Board capacity to take on leadership roles on Board

2011 Performance Indicator #1: Board structure for Chair and Co-chair development process is in place by end of 2011	2012 Performance Indicator #1: At least 4 new Board members join the OMEN board, with a slate of at least 7 potential board member candidates
--	---

Objective 3: Increase Board diversity to reflect OMEN membership

2011 Performance Indicator #1: OMEN Board Development Committee identifies strong Board candidates to reflect OMEN membership, including rural membership and ethnically diverse membership, with at least three (3) members or 30% of Board members representing ethnic diversity	2012 Performance Indicator #1: At least 50% of Board represents rural communities, and at least 33% represents ethnic diversity
--	---