

Polk County Rural Tourism Studio
12 Month Progress Report
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RURAL TOURISM STUDIO

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A. Introduction and Overview

This report presents a progress assessment for the Rural Tourism Studio (RTS) program in Polk County. The RTS program workshops commenced in September 2014, and wrapped up in January 2015.

In August of 2015, six months after completion of the RTS workshops, all participants received an electronic survey to gauge their short term impressions of what aspects of the program had proven most useful and effective as the community moved into project implementation. Based on past RTS experience, communities don't tend to make breakthroughs on their projects until at least a year after the workshops, so there is generally little *project implementation* success to report at the six month mark: this was also true for Polk County. Survey results, including comparisons with other RTS communities at the same stage of implementation, were summarized in a Six Month Progress Report and those results are referenced in this report where appropriate.

The RTS program design was modified and intensified for this region, specifically based on the experience in the Wild Rivers Coast region, where dedicated coaching after the end of the RTS workshops was a key success factor. In that region, the coaching began roughly 6 months after the end of the workshops, and was preceded by considerable frustration and wheel spinning on the part of all-volunteer action teams. **In Polk County, Travel Oregon made a community coach available immediately following the RTS workshops, with the hope that this would translate into reduced local frustration and sustained momentum.** And to a degree, this was successful.

This report draws on phone or in-person interviews with several steering committee members and other key stakeholders as recommended by Travel Oregon. Interviews were conducted in April and May of 2016. The Appendix includes a summary of key interview questions and a list of interviewees.

B. Perceived Value and Impact of RTS: Survey and Interview Findings

Sixty three community members participated in RTS activities, which is a high number for the size of the region. One third of participants attended at least half of the RTS offerings. An average of 32 people (ranging from a low of 21 to a high of 38) attended each workshop. Furthermore, there was little downturn in attendance over the course of the RTS workshops—the final teaming workshop attendance attracted 28 attendees.

The e-survey at six months post-RTS showed strong evidence that RTS has led to positive change on most short term parameters in the logic model. RTS had a positive impact on all variables related to the level of personal engagement in future tourism development, and on all community conditions related to tourism. For four of the six “personal engagement” factors and all of the “community condition” factors, this region has experienced the greatest positive change in any RTS community to date. Several “community condition factors” grew by more than 100%.

This is particularly striking because Polk County's starting level of personal engagement is typical of past RTS communities. **All of the indicators related to personal engagement in future tourism development improved (by between 35% and 68%) after the RTS workshops.** The two factors that most changed align with where respondents most perceive RTS as having *caused* the change.

- Level of involvement with tourism development

- Effectiveness of working relationships

In terms of their starting level of community conditions, Polk County respondents rated themselves somewhat lower, on average, than past RTS communities. **All of the indicators related to community conditions for future tourism development improved positively (by between 35% and 150%) after the RTS workshops.** Compared with past RTS communities, Polk County respondents describe strikingly greater positive changes in community conditions across the board than any past community.

In terms of community conditions related to tourism, the four indicators (of 12) that changed the most were:

- Clarity of community vision for tourism development (+150% change)
- Clarity of action plan (+137%)
- Clarity of community priorities (+121%)
- Level of collaboration (+113%).

Connections with others (regional and statewide tourism partners, others in my community, and expert presenters) were highly rated as in past RTS communities as having lasting value. But for the first time, the marketing workshop, which has recently been revamped, was also rated very highly in terms of having “lasting value”.

The e-survey suggested several specific areas for additional probing at the twelve month mark.

- What contributed to the large gains in collaboration? Was the mix of people initially involved a factor?
- What was the role of the community coach, a new program feature? How has this affected implementation?
- How has the vision and action plan served as a guide? Has the early emphasis on this made a difference?
- How have new people become involved? Does the higher number of early participants directly yield more robust action team for implementation?
- How has the training on marketing been used? Did it translate well to action planning?
- How have the positive changes from RTS affected the community’s ability to move forward with implementation? Has the community involvement and collaboration been sustained? What has been done since the RTS ended to keep people engaged, and what yielded results?

In terms of **factors influencing increased collaboration**, interviewees noted the following:

- “Polk County’s geographic size is relatively small, and that means that we tend to share the same space and know the same people. I knew many of the RTS participants before the program, and I ‘knew of’ many others. I think the RTS reinforced and deepened relationships so that we are not total strangers. It is easier now to pick up the phone when we need something or want to share something. “As in other RTS communities, the Ford Institute Leadership program which preceded RTS also tilled this same soil.
- The community has a number of newer people in leadership positions. “We don’t have the baggage associated with past personality conflicts or turf issues. We appreciate that the RTS brought the right people together- there was lots of outreach beyond the usual suspects so it didn’t feel like an ‘old boys club’”.

- On a parallel track with RTS, the county's three chambers and government representatives created an ad-hoc tourism working group to better coordinate and improve tourism development.
- The pivotal relationship with Polk County's DMO, Travel Salem, has improved. "The biggest change in the positive direction was this relationship- while it was warming up before RTS, we had been standoffish in the past and we didn't believe they could represent us. Their presence at RTS and elsewhere in the county built trust and understanding." Additionally, participants noted the usefulness of Travel Oregon's presentations at RTS on marketing and the role of DMOs.
- Some pointed to the role of the community coach as important, because a person from outside the community could ask questions like "Why aren't you working with X organization?" The "coach also brought good perspective from other parts of Oregon", both how the process unfolded and resources available to support local priorities.
- For the projects and action teams that have been successful, especially bicycling, there are passionate champions involved whose perseverance and success brings others to the table who want to get involved. Success inspires more collaboration.
- A number of people highlighted the success of the bicycling action team as a collaborative endeavor. They pointed out the critical connector and champion role of the City of Independence Economic Development Director, Shawn Irvine. They also highlighted the importance of engaging knowledgeable, passionate bicycling advocate with private sector ties.
- The City Council and staff of Independence are viewed as entrepreneurial and risk-tolerant; they have regularly invested in new and unproven initiatives when they believe there is a chance of good results. This willingness to support staff time and provide seed funds for new projects energizes collaboration.
- A fair amount of serendipity happened to surface immediate and concrete opportunities for bicycle tourism product development. This "luck" favored the prepared: action team members communicated passionately about their goals with their individual networks, which generated a ripple effect that connected entrepreneurs and project sponsors as new partners. They didn't chase leads, but crafted win-win proposals in partnership with the contacts who came forward.
- No particular aspect of the training itself was seen as critical for collaboration: rather, the act of participating in the training itself strengthened trust and relationships that proved valuable for collaboration. However, if the training were useless or boring, it may not have been able to sustain participation, so clearly, the program offered content of value as well.

In terms of the **factors underlying increased clarity of vision for the future** as reported at the six month mark, there are mixed reviews about its usefulness now.

- The vision was well-integrated as a reference into action planning during and after the Rural Tourism Studio workshops and follow up coaching.
- Unlike for some past RTS regions, the vision does not seem to be an active touchpoint at the 12 month mark. "During the studio, having a vision in the forefront was important, but I'm not sure how much we think about it now." "I don't think we've looked at it since the studio ended." "I haven't heard people talk about the vision now, but the process did help us to have a more comprehensive mindset."

- As people describe their experience with RTS, they seem to reinforce pragmatic and opportunistic action over long range visionary planning. This could be an aspect of local culture that contributes to Polk County's fast start with implementation relative to past communities.
- Because the vision was so all-encompassing, it didn't work for everyone. As one interviewee noted, "I'm not sure everyone agreed with it, because it was trying to be all things to all people. The refined draft wasn't enthusiastically reviewed."

The high number of program participants has not directly yielded more robust action teams for implementation.

- The bicycle action team has a small number of formal participants, but its members are well connected to allies who provide advice and energy outside of the action team meetings. These connections have been critical resources for surfacing opportunities for action. "We spent our time on growing actions, not growing the committee."
- Despite promising opportunities for action during RTS, the agritourism action team has not jelled. This is attributed to personality conflicts and lack of a committed project champion. The current team lead is frustrated by the lack of people to move beyond talk to action.
 - While personality conflicts aren't necessarily predictable or permanent, there is a broader potential lesson about agritourism action teams in general. Because the natural champions-- farmers and restauranteurs-- work very long hours, often as sole proprietors, they are particularly difficult to engage on committees.
 - Where agritourism has been a successful offshoot from RTS (Wallowa County, John Day River Territory, and Wild Rivers Coast), volunteer action has been supplemented by paid staff coordination. In Polk County, Travel Salem has just stepped up to provide some staff support.
 - In future communities, agritourism action teams should pro-actively address this need to increase their chances of success.
- The heritage and cultural tourism committee never activated after RTS, as its key champion was sidelined by health issues. This is on the Steering Committee's radar as needing follow up.
- As has happened in several other communities, the Marketing and Steering Committee have many overlapping members and responsibilities. They have merged, which seems to make sense here as a general practice for efficiency. Recommending this as a matter of course after the RTS workshops end is worth considering in future RTS communities.

The training on marketing has supported a stronger relationship between Polk County and Travel Salem.

- As noted above, this training was useful in building shared understanding of the system for tourism marketing in Oregon. This was true even for participants who already had marketing experience and knowledge of Travel Oregon.
- The training facilitated prioritization of marketing projects, as it clarified which elements were foundational for future work.

The positive changes from RTS have built capacity for implementation, even though community engagement on action teams is relatively small. Collaboration is much more the norm now.

- As noted above, the level of collaboration has been sustained, even though participation in formal action teams is relatively small. Small but effective action teams are not uncommon in RTS communities. Interviewees place a high value on consistent communication as a beneficial practice: this is not rocket science, but it takes practice and thrives on the visible positive results that have occurred so far. “It’s been fun watching the change in the conversations, and the understanding grow that we are much better and strong if we work together.”
- One interviewee suggested that momentum could be sustained better if the grant period were longer than one year. This would allow people to focus on one or two (most ready) action teams at a time, rather than spread their energy across three or four simultaneously. It would also free up time for seizing appropriate unanticipated opportunities without the risk of burning out champions.
- “I felt it we came out of this with one really engaged group that continues on, this is success. The cycling group alone makes all our work through RTS worthwhile”.

C. Logic Model vs. Actual Activities and Outcomes

When the initial Rural Tourism Studio program was first being designed, Travel Oregon developed a “logic model” to identify the intended benefits and results of the program as it unfolded in each host community over time. The chart below summarizes the key **logic model milestones for the first twelve months of activities after the RTS workshops are delivered, and the associated indicators of progress for Polk County** during this time period. The rows shaded in green show milestones that have been completely met. The yellow rows show milestones where some notable progress has been made, even if incomplete. Red rows indicate milestones and activities that have stalled. **In the case of Polk County, the majority of milestones have been fully met.**

Immediate outcomes as per logic model:

Logic Model Milestone	Progress Indicator for Polk County
Formation of action teams to move ideas and projects forward	4 teams formed at final RTS meeting: bicycle tourism, heritage and cultural tourism, agritourism and culinary tourism and marketing.
Newer, more diverse mix of people involved with action teams	Four action teams (Marketing, Bicycling, Agritourism and Heritage/Cultural Tourism) were established. The bicycling action team attracted several allies who actively assist in advancing bicycle tourism development without being team members. Through this network, unanticipated opportunities for immediate action surfaced. As a result, this team generated very early and visible results.
New awareness and knowledge of tourism development opportunities and resources	Yes, as a result of effective marketing training during RTS and increased communication about opportunities and resources at the action team level.
New connections made across diverse sectors in the community	Yes, stronger relationships among Chambers of Commerce (as a result of parallel effort) and especially between Polk County Chambers, cities and the Destination Marketing organization. The bicycle tourism action team has coalesced energy from many sources, some of which of new to the community.
Community in agreement on a vision for tourism in their area and critical next steps to move forward	Yes, vision developed through RTS, refined at final workshop, used as guide for action plans. Not clear if it is still a point of reference to sustain momentum beyond the first set of priority projects.

Establish deeper relationships between state and regional tourism development organizations and local players	Absolutely as noted above.
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Short term follow up *activities* as per logic model (3-12 months):

Logic Model Milestone	Progress Indicator for Polk County
Action teams meet, grow, make decisions on priorities and begin implementation.	<ul style="list-style-type: none"> Two action teams (Marketing/Steering and Bicycling) are very active. While the action teams have not grown in size since the end of RTS, the bicycling team has several allies who actively assist in advancing bicycle tourism development without being team members. The action team and allies together have strong private sector representation. Agritourism and Heritage/Cultural tourism teams are inactive.
Submittal of matching grant applications to Travel Oregon that reflect clear connections to goals of RTS	<ul style="list-style-type: none"> The transition from RTS to making decisions about priority grant projects was easy. Grant written by experienced Monmouth City staff person, so the process was not painful. Matching funds were provided by the County's three cities, as well as its two Chambers of Commerce. Each project is aligned with RTS goals.
Products from RTS completed (e.g. strategic plan, vision, asset inventory, etc.)	Yes, with most extensive asset inventory to date. Networking sessions held prior to RTS workshops, and mapping by Travel Oregon staff, gave the inventory a jump-start.
Follow up assistance provided from Travel Oregon, Regional Destination marketing organizations (RDMO), and partners	<ul style="list-style-type: none"> Yes, more intensively, through coach funded by Travel Oregon with regular on-site presence. A local member of the Oregon Tourism Commission has been active in referring project opportunities and stakeholders for the bicycle action team.
Ongoing evaluation	No local action cited yet.

Short term (3-12 months) *outcomes* as per logic model:

Logic Model Milestone	Progress Indicator for Polk County
Visible synergy and momentum of action teams	<ul style="list-style-type: none"> The merged Steering Committee and Marketing Team is working well, after a period of time when Steering Committee meetings had been frequently rescheduled or cancelled. The Bicycle Action Team has great momentum, and its accomplishments are celebrated and shared by interviewees from other teams. The role of the coach is seen as useful, but not as the driving force for momentum as it was on the Wild Rivers Coast.
New projects underway or progress on pre-existing projects	<ul style="list-style-type: none"> Several bicycle tourism projects underway, some anticipated and some opportunistic: Bike with GPS, two new events, cycling video underway The marketing project is underway. The agritourism mapping project has stalled so far. Travel Salem's increased coordination role may help to energize this group. Digital outdoor recreation map.

Businesses are testing new tourism products and markets with some initial success	Increased participating of local businesses in the “Bike Friendly Business” program. A dozen newly listed bike friendly businesses in Polk County now listed on the Travel Oregon website
Public and nonprofit support organizations are testing new tourism products and markets with some initial success	<ul style="list-style-type: none"> Increased support and awareness reported for bicycle tourism infrastructure as an economic driver and a quality of life asset for local residents. Western Oregon University is ramping up conference services, which can yield new customers for tourism businesses as well.
New partnerships and new resources for tourism development, including more integrated relationships between state and regional tourism development organizations and local players	<ul style="list-style-type: none"> As noted above in the immediate outcomes, Travel Salem and Polk County have a closer relationship, as well as Travel Oregon and Polk County. The Bicycle Tourism Action team has developed several sector-specific partnerships as noted above. Local partners are using own resources to bring front-line employee training and education RARE program participant anticipated to help advance projects- Travel Oregon established partnership to increase RARE focus on tourism.
Increased integration of tourism planning with other community and regional planning, other community and regional stakeholders	<ul style="list-style-type: none"> Tourism not yet seen a central driver for economic development, but it is a regional priority as evidenced in other plans.

D. Follow up Opportunities, Promising Projects, and Program Design Implications

Promising Projects to Document as Case Studies

The bicycle tourism success is a great example of how to surface unexpected opportunities through smart networking and deep knowledge of local assets. **What looks like serendipity on the surface is more a matter of “luck favoring the prepared.”** The partnership with Ride with GPS shows a **great model for bike ambassadors.** The relocation of the Cherry Pie Bike Race to start and end in Independence is a great example of how casual conversations about possibilities can spark new ideas that city governments can quickly mobilize to support. Additionally, the strengthened DMO relationship could yield a **great story about what it takes to connect rural and urban tourism development in a useful and sustained way.**

Implications for program design

A number of recommendations were implemented in Polk County based on the Wild Rivers Coast experience, and these worked well. In terms of future design implications, there is only new one to consider. That is to further **examine whether action team overload and/or the one year grant implementation timeframe for all projects contributes to being overwhelmed** and an initial sense of stalled momentum. We have not yet cracked the nut of how to smoothly sustain momentum, though the addition of a coach has certainly helped greatly.

Finally, Polk County is a **small geography for the RTS program** and, delivered at this scale, is likely not sustainable for Travel Oregon’s budget. While the region is small, Polk County’s cities are large enough to have paid community and economic development staff, which is a great asset. The benefits of a small region are the opportunities for solidifying collaboration in an environment where people already cross paths frequently. The drawbacks include difficulty of broadening the pool of leaders beyond those who are already active.

Appendix- Stakeholder Interview Questions

Interviewees:

Shawn Irvine	City of Independence
Jean Love	Monmouth-Independence Chamber of Commerce
Kenji Sugahara	Oregon Bicycle Racing Association and Oregon Tourism Commission
Marshall Guthrie	City of Monmouth and Western Oregon University
Irene Bernards	Travel Salem
Tom Johns	Emerson Vineyards

Questions

- About the process (if involved with action teams)
 - What's been happening since RTS ended- overall and with your action team?
 - Have you been able to sustain your momentum?
 - How often do you meet? How do you work?
 - How connected is the work of the various action teams? Do you feel well informed about the whole?
 - What support have you received? Is more needed
- About the grant
 - Was it hard to come to agreement about priority projects?
 - Was the application process smooth?
- About the six month e-survey findings
 - What contributed to the large gains in collaboration? Was the mix of people initially involved a factor?
 - What was the role of the community coach, a new program feature? How has this affected implementation?
 - How has the vision and action plan served as a guide? Has the early emphasis on this made a difference?
 - How have new people become involved? Does the higher number of early participants directly yield more robust action team for implementation?
 - How has the training on marketing been used? Did it translate well to action planning?
 - How have the positive changes from RTS affected the community's ability to move forward with implementation? Has the community involvement and collaboration been sustained? What has been done since the RTS ended to keep people engaged, and what yielded results?
- About the projects
 - What stories are emerging?
 - What helped with success?
 - What's been challenging?
- Outlook for future, lessons for other communities and next steps