Oakridge Rural Tourism Studio
Six Month Progress Assessment
July 2010

A1. Introduction

This report presents a preliminary progress assessment during the first six months after delivery of the pilot Rural Tourism Studio (RTS) program in Oakridge, Oregon. This assessment is intended to serve as a "developmental evaluation" resource, rather than as an indication of overall program success or failure.

In Part B1, I compare the anticipated program activities and early outcomes as described in the Rural Tourism Studio logic model with what actually happened in Oakridge. Personal interviews and an email survey show strong evidence that RTS has led to positive change on most short term parameters in the logic model. Although there have been many positive changes, the community has also experienced difficulties moving forward. The RTS steering committee has not yet submitted its matching grant application to Travel Oregon. There is concern about "backsliding" in terms of collaboration going forward as a result.

In Part B2, I summarize Oakridge RTS participant observations about needed or desired follow-up. This section also contains suggestions for future program design now that participants can look back at their experience. The most expressed needs are for follow up training, follow up assistance with tracking action team progress, and assistance with resource development for project implementation.

The project has created tremendous good will for Travel Oregon among diverse stakeholders. Despite short term setbacks, Oakridge stakeholders are much more aware of bicycle tourism as a viable economic engine for the community, they are taking new action, and they feel better prepared to capitalize on emerging opportunities as a result of the RTS workshop series.

A2. Methodology

This report draws on three sources of information gathered between May and June 2010.

1. Survey monkey to all participants in workshops, regardless of how many sessions they attended- 7 responses (total sent = 39). The Appendix includes a summary of key survey findings. The full survey and results are available through the Travel Oregon survey monkey account.
2. Phone or in-person interviews with steering committee members and other key stakeholders as recommended by Travel Oregon. The Appendix includes a summary of key interview questions.
   - Gordon Zimmerman, Oakridge City Manager
   - Randy Dreiling, President, Chamber of Commerce and bicycle tourism business owner
   - Ben Beamer, GOATS (local International Mountain Biking Association chapter) and business owner
   - Sayre Custer, VP of Chamber

- George Custer, Uptown Business Revitalization Association
- Elizabeth Barclay, Owner, Cascade Motel
- Chris LaVoie, Earth Quest Partners, Blue River,
- Lynda Kamerrer, Owner, Oakridge Hostel (plus brief conversation with co-owner Gary Carle)
- Norm Coyer, GOATS, small business owner
- Jenifer Kay Hood, former Enterprise Facilitation Program Manager

3. Reviewed RTS documentation of products developed during workshops, action planning notes from the last workshop.

B1. Activities and Outcomes: Logic Model vs. Actual Experience

Personal interviews and an email survey show strong evidence that RTS has led to positive change on most short term parameters in the logic model. The most often cited changes include more widespread understanding and support of bicycle tourism as a viable economic engine for the community, and more knowledge of assets and resources for tourism development. Many also cite reduced polarization around tourism, and improved relationships among participants. For example:

- *I've never felt so much positive energy in the 25 years I've lived in Oakridge*
- *Participating in the RTS gave me a reason to keep on what I'm doing. It validated that we are on the right track, that we are not "dying on the vine"*
- *I had no idea that bicycle tourism can generate so much positive economic impact for our community .*
- *Overall, positive. Fun, interactive, great ideas*
- *We are finding our identity as a community.*
- *It helped bring different factions together. We started recognizing each other's point of view*
- *People are doing more, with more focus around tourism, and there are new people involved*
- *RTS instilled a "yes, you can do this" attitude!*

Across the board, in the six months since the completion of the Oakridge RTS, there have been positive changes in personal engagement, clarity of vision and action plans, collaboration, organizational capacity, and political support for tourism development. Furthermore, respondents perceive positive causal linkages between the program and observed community change. They indicate that the RTS program has had lasting value. And, they are moving forward successfully with implementation activities on some of the action teams.

Although there have been many positive changes, the community has also experienced difficulties moving forward. The RTS steering committee has not yet submitted its matching grant application to Travel Oregon: the action teams have uneven momentum and have not completed their project definition/budgeting process. There is some underlying conflict among stakeholders about priorities and how decisions are being made since the formal RTS workshop series wrapped up. And there is concern about "backsliding" in terms of collaboration going forward as a result.

The chart below summarizes the logic model milestones and associated indicators of progress in Oakridge.

Immediate outcomes as per logic model:

Formation of action teams to move ideas and projects forward	Workshop participants self-organized into four action teams at the final RTS workshop in January. Action teams: • Concierge/Tourism Ambassadors- 5-7 members to start as per final session meeting notes (unclear notes) • Story Diggers (Geotourism)-4 members • Bicycle Cool Kids (Bike Tourism)- unclear from notes how many active individuals to start, but this project built off an already established committee called GOATS (Great Oakridge Area Trail Stewards). 1 named convener • Beautification- no members listed in final session notes (though later, a committee of 2 was launched)
Newer, more diverse mix of people involved with action teams	Approximately 16 core participants in the three non-biking committees. The bicycle tourism work group has approximately 25 active participants at its monthly meetings and/or trail work parties. • For bicycle tourism, the action team is essentially a project of GOATS which is managing a much larger IMBA Bike Center development project. This group did not gain diversity of participation, but it was already vibrant to start with. • Several new people involved in the Tourism Ambassadors project—at least 3 folks who had been active in other community issues, but not tourism have stepped up and been named by others during interviews. • One new business owner involved with Story Diggers • Newly engaged City Councilor and more active lodging owner involved in Beautification.
New awareness and knowledge of tourism development opportunities and resources	Yes, this was cited as a major benefit in personal interviews, and also reflected in the electronic survey results. Specifically, participants valued new information about scale of bicycle tourism market opportunities, and about resources from state and regional tourism development efforts. See Tables C1a through C1c.
New connections made across diverse sectors in the community	Many interviewees cited new connections between proponents of bicycle tourism and other interests in the community, as per quotes in the first section of this report. Reduced polarization, new relationships; "we started recognizing each other's point of view." Two factors negatively influenced participation and the level of new connections. • The RTS program occurred at the same time as the Ford Institute Leadership Program. This was perceived to have drawn away from broader participation at RTS. • More significantly, there is a faction of businesses who are anti-Chamber of Commerce because of perceived conflicts of interest in the tourism marketing fund allocation role of the Chamber of Commerce/City Council.

	In my interviews, this issue was brought up repeatedly as a continuing problem.
Community in agreement on a vision for tourism in their area and critical next steps to move forward	Yes, written vision and action plan are products of workshops. According to e-survey, "clarity of action plan" was one of the community conditions most improved by RTS.
Establish deeper relationships between state and regional tourism development organizations and local players	Yes, great appreciation for Travel Oregon and Travel Lane County being so directly involved in this project.

Short term follow up activities as per logic model:

Action teams meet, grow, make decisions on priorities, begin implementation	All action teams have met- little evidence of growth. • The bicycle tourism action team, as noted above, merged with a pre-existing group, and has begun implementation of the IMBA project. It has not grown. • The Ambassadors action team is meeting monthly, and has sponsored a well-regarded Q Care Customer Service Training as a first implementation step . Several other projects pending to increase tourist education: seasonal table cards, "I Speak" t-shirts and buttons, visitors guide. It is the largest of the new action teams (see above) • The Storydiggers Oral History action team has 2 active committee members, implementation (story gathering) begun, and the chair is frustrated with lack of community participation thus far. It has shrunk in membership since the RTS series ended. • The Beautification action team also has 2 active committee members. This group is still refining its project focus as part of the matching grant application pending.
Submittal of matching grant applications to Travel Oregon that reflect clear connections to goals of RTS	Matching grant has not yet been submitted and seems stalled. • Initial delay due to internal processing issues at Travel Oregon related to application template. For some Oakridge stakeholders, this was a major frustration that caused loss of momentum • Some controversy over changes in scope of projects to be proposed for matching grant since the last RTS studio meeting. Lack of shared documentation (e.g. common budget) and cross-action team understanding of each project as it now stands • Bicycle tourism project does not need funding from the matching grant. Ambassadors, Beautification and Storydiggers do—not all projects have clear descriptions or final budgets yet. • Volunteer community member agreed to write but this person wears many hats, has not completed yet • Travel Oregon offered to facilitate local planning meeting, but two major stakeholders (City manager and Chamber president) declined offer- did not feel it was necessary.

Products from RTS completed (e.g. strategic plan, vision, asset inventory, etc)	Yes, the vision, interim goals, action plan and asset inventories were completed during the RTS workshops.
Follow up assistance provided from Travel Oregon, Regional Destination marketing organizations (RDMO), and partners	Travel Oregon convened a conference call to assist with Matching Grant and offered follow up meeting as noted above. Travel Oregon is also actively involved in the IMBA project and promoting bicycle tourism in general. Several interviewees noted that the new Lane County Visitors Center at Gateway has been a good source of referral for visitors to Oakridge. Not sure what else has been provided (no documentation) but most respondents in personal interviews all indicated an interest in further contact, prodding and training. See Section B2 for specifics
Ongoing evaluation	Yes: that is my scope! A separate work product includes comparative data for the two RTS pilot communities, and recommended program/evaluation modifications based on learning to date

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

Visible synergy and momentum of action teams	The City Manager convenes a bi-monthly coordinating group with representatives from each of the action teams. Not otherwise much evidence of synergy. As noted above, momentum varies greatly by action team. • Several interviewees noted that it is fine that the projects are handled by separate action teams, because they are very distinct and diverse. • Others noted their concern that the action teams aren't better coordinated, and that there are lost opportunities for synergy and for effective communication about emerging priorities. • Respondents in the personal interviews did not have a good sense of overall synergy or momentum. People see their own piece. • Some fear that bringing the whole group together more actively would further bog down decisions about the matching grant, and that personality conflicts would "shatter" the fragile new relationships. • Others concerned that community is backsliding in terms of progress around polarization, and that increased communication is needed to keep new leaders engaged, to address issues of trust
New projects underway or progress on pre-existing projects	• As noted above, Q Care Customer Service Training has led to new ideas and energy for tourist education beyond what

	front-line staff can communicate directly. Also, IMBA bicycle tourism development project is underway. • No formal documentation about projects or progress on hand at Travel Oregon, since no matching grant application has yet been submitted.
Businesses are testing new tourism products and markets with some initial success	Pending results of business survey. Anecdotally, • Local hotel installed bike washing stations, saw increase in bike tourism customers • Visitor kiosk going through brochures more rapidly than last year
Public and nonprofit support organizations are testing new tourism products and markets with some initial success	Too soon to tell. No examples cited to date.
New partnerships and new resources for tourism development, including more integrated relationships between state and regional tourism development organizations and local players	The pending IMBA project was one reason that Oakridge was selected as an RTS pilot. The IMBA project involves many partners at the local, regional, state and national levels. It, however, pre-dates the RTS studio program.
Increased integration of tourism planning with other community and regional planning, other community and regional stakeholders	Several other planning efforts preceded the RTS, as noted in the baseline assessment, including a 2009 Visitor Readiness Report that recommended rebranding, and a Community Trails Plan. Oakridge also actively participated in the regional Oregon Cascades Geotourism MapGuide project. The City and Chamber adopted new branding recommendations. The City does not have a formal economic development plan and tourism is not *central* to the informal strategy, according to the City Manager. Tourism is still not heavily emphasized in regional plans.

B2. Opportunities for Follow up and Course Adjustment

In general, participants were very pleased with the program. They understood it was a pilot, and were very satisfied with the workshop content and the follow up momentum. As one participant stated, "the content was brilliant!", and many others echoed this sentiment. Much of the immediate program feedback has already been captured in participant surveys after each workshop, and debriefings with the local steering committee and with the trainers.

Of note from the immediate workshop evaluations, there was broad interest in an option for more advanced marketing training as part of the RTS workshop series. Oakridge participants had a wide range of expertise related to marketing. There was significant interest in more advanced marketing strategies, more on social media, more rural examples, and more time during the training to apply the information received to their own community.

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Below are some additional issues that became clearer as opportunities for improvement or follow up once some time had passed after the last RTS workshop.

Dissemination of final RTS products: Refine and distribute as early as possible
Particularly in a community with a history of polarization, Travel Oregon may need to play an *active* role in facilitating clear and transparent communication about information shared and decisions made both during and in the immediate months after the RTS workshops are complete. The vision and interim goals document is excellent, for example. The final action planning notes are incomplete, and revised action team projects and budgets have not been shared at all.

It worth paying more attention to ensuring that key documents are available to all participants, and to build upon the project web portal concept that was initiated with Oakridge.

Ongoing coordination of effort: Check in and nudge for momentum
The RTS ended with the formation of several action teams focused on different projects. It does not appear that the stakeholders as a whole have continued to share information about their progress and potential opportunities for collaboration. As a result, no one has a good handle on the overall progress, nor can promote broad successes to build momentum.

Several people noted that Travel Oregon could help by checking in pro-actively with action teams on their progress, requesting updates and offering assistance as possible, and by facilitating the exchange of updated information. But not everyone wanted to be "nudged." Given the stalled experience in Oakridge, however, it is worth instituting a mandatory in-person check in meeting within several months of the end of the RTS workshops, to give the community a focus deadline for its immediate follow-up efforts. This will also allow Travel Oregon and its partners the opportunity to troubleshoot any follow up issues before they become major barriers to progress.

Travel Oregon can further help the project sustain momentum by building more time into the RTS workshop format for local and regional players to exchange information about current activities and future plans. In future communities, the baseline assessment report will already in place when the workshops begin. Reviewing and augmenting that information could build new knowledge and understanding about how to tap existing resources.

Project funding: Simplify the application, assist with other connections
For future RTS communities, Travel Oregon could simplify the Matching Grant application by pre-qualifying participating communities that achieve certain benchmarks during the RTS process. The standard program application is laudable in its comprehensiveness, but it requires RTS communities to restate and reorganize much of what they have just completed through the workshops. Specific project information only could be the focus of the Matching Grant application.

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Other follow up training and technical assistance: formalize follow up

Everyone interviewed was interested in a follow up convening and/or training hosted by Travel Oregon 6 months to a year after the initial workshop series. It would serve several purposes:

- Define a clear timeframe for formally checking on progress, and making adaptations as needed
- Expand skills and knowledge; RTS follow up activities will build a wider audience for "Tourism 101" or other basic topics covered during the original RTS, and such topics could be repeated for newly involved stakeholders
- Consider Q Care Customer Service Training as a recommended follow up in participating communities. In Oakridge, this effectively focused and energized the "Ambassador" action team.
- Enhance skills and knowledge of longer term RTS participants through advanced or specialized training.
- Renew the relationships between Travel Oregon, the DMO, the RDMO and other key partners
- Draw publicity to achievements

In general, a program design issue to be addressed is "How long is a community in the RTS program?" The answer to this question will be driven both by program goals/expected implementation timeframes, and by program resources. The answer to this design question will provide guidance as to appropriate timing for follow up activities.

C1. Appendix- Electronic Survey Results

Overview

- 18% response rate: 7 survey respondents out of 39 who attended and had email address on record.
- 4 respondents were members of the RTS Project Steering Committee
- All respondents attended at least four of the 9 workshops or events associated with RTS
- The two workshops with the highest percentage of respondents attending were the bicycle tourism planning workshop and the "marketing on a shoestring" workshop.
- The same two workshops drew the second and third highest total attendance (24 and 18 people respectively) for any of the RTS workshops or events. The community planning workshop (the opening session) drew the largest number of attendees (26).
- 5 of the seven respondents are currently members of action committees. 2 responded that they were not participating on an action committee.

Table C1a: Please rate the following:

	Pre-RTS (Sep 09)	6 months post-RTS (Jun 10)	% Change	Perceived impact of RTS on any changes noted	Importance of this factor in shaping future tourism
Your knowledge of emerging market opportunities for tourism development	3.71	4.71	+27.0%	4.17	4.43
Your knowledge of sustainable tourism development principles	3.71	4.57	+23.2%	4.17	4.57
Your level of involvement with tourism development in your community	3.14	4.14	+31.8%	3.43	4.57
Your awareness of assets and resources for tourism development	3.43	4.57	+33.2%	4.00	4.86
Effectiveness of your working relationships with other organizations working on tourism development	3.14	4.43	+41.1%	3.43	4.57
Your commitment to take specific action to tap tourism development opportunities in your community	3.43	4.29	+25.1%	3.43	4.43

Table shows average scores, on a scale of 1-5, with 1 being "low" and 5 being "high"

Table C1b: How strong are the following conditions related to tourism in your community?

	Pre-RTS (Sep 09)	6 months post-RTS (Jun 10)	% Change	Perceived impact of RTS on any changes noted	Importance of this factor in shaping future tourism
Clarity of community vision for tourism development	3.00	3.86	+28.7%	3.86	5.00
Clarity of community priorities for tourism development	2.71	3.71	+36.9%	3.57	4.83
Clarity of action plan for tourism development in your community	2.57	3.71	+44.4%	3.86	5.00
Level of community involvement in tourism development efforts	2.71	3.14	+15.9%	3.29	5.00
Level of collaboration for tourism development efforts	2.29	3.29	+43.7%	3.71	5.00
Capacity of organizations in your community to implement successful tourism development project	2.71	3.57	+31.7%	3.86	5.00
General community support for tourism as an economic development strategy	2.57	3.71	+44.4%	3.86	4.83
Local political support for tourism as an economic development strategy	3.86	4.43	+14.8%	4.14	4.63

Table shows average scores, on a scale of 1-5, with 1 being "low" and 5 being "high"

Table C1c: What has had lasting value for you since the Rural Tourism Studio workshops?

Overview of sustainable tourism principles	4.00
Development of a community vision for tourism	3.86
Development of an asset inventory	4.14
Development of a tourism action plan	4.14
Information about bicycle tourism	4.71
Information about geo-tourism	4.29
Information about state tourism programs	4.50
Information about regional tourism programs	4.14
Information about event planning	3.67
Information about niche market opportunities	4.14
Training on marketing	3.33
Information about funding resources	3.86
Training on fund development	3.71
Training on collaboration and team building	4.17
Connections with others in my community	4.14
Connections with expert presenters	4.00
Connections with regional and statewide tourism development organizations	4.00

Table shows average scores, on a scale of 1-5, with 1 being "not useful" and 5 being "extremely useful"

C2. Appendix- Stakeholder Interview Questions

1. Projects and action
    a. Tell me about what's been happening related to tourism since the RTS program workshops concluded in January. (What are the projects and how are you involved?)
    b. What are you most excited about in terms of each project or tourism development in general?
    c. Do you have any concerns about challenges that the projects or tourism development in general will face?

2. Changes
    a. What changes have you seen in these or other activities related to Oakridge tourism development after RTS? Do you see a link between RTS and that change?
    b. What changes in relationships/collaboration have you seen in Oakridge after RTS? Do you see a link between RTS and that change?
    c. What changes do you see in the level of involvement in Oakridge tourism development after RTS? Do you see a link between RTS and that change?

3a. Program design
    a. Is there anything specific you've really found useful that you gained from the RTS experience?
    b. Is there anything you would change about the RTS program, now that you have the benefit of six months experience and hindsight?

4. Other
    a. Is there anything that Travel Oregon could do now to help you succeed?
    b. Anything else you want me to pass on?

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