

## BARNEY & WORTH, INC.

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November 14, 2013

Tualatin River Watershed Council  
Kristel Fesler, Water Resources Program Coordinator, City of Hillsboro  
via email: [Kristel.Fesler@hillsboro-oregon.gov](mailto:Kristel.Fesler@hillsboro-oregon.gov)

Re: Consulting Services for Development of a Marketing and Funding Strategy

Dear Kristel,

We understand the Tualatin River Watershed Council is seeking consulting support for the development of a Marketing and Funding Strategy.

Barney & Worth, Inc. has more than 30 years of experience in strategic planning for communities, non-profit organizations, businesses, and public agencies. The firm's portfolio of experience includes:

- Designing and conducting decision processes that produce strategic plans and business plans.
- Updating and refreshing existing plans.
- Facilitating workshops at key junctures in strategic planning.
- Leading external assessments – environmental scans and SWOT analyses – to broaden an organization's outlook early in strategic planning.
- Conducting stakeholder and public involvement that contributes to strategic plans.
- Writing, designing and publishing strategic plan documents.
- Developing strategic planning processes to be conducted in-house by client staff.

For Tualatin River Watershed Council, we propose to support the Council's effort to develop a Marketing and Funding Strategy by donating our professional services. Barney & Worth understands watershed councils are at the heart of sustainable long-term solutions for protecting and improving Oregon's streams and rivers. The Tualatin River is Washington County's only river—an invaluable resource. It supports fish and wildlife and is used for regional drinking water supply, agricultural irrigation, and recreation. We are pleased to participate in your planning effort to further protect this important resource.

Attached is our proposed workscope, schedule and budget. Please don't hesitate to contact me if you have any questions.

A handwritten signature in black ink, appearing to read 'Libby Barg', is shown on a light-colored background.

Libby Barg, Vice President  
[libbybarg@barneyandworth.com](mailto:libbybarg@barneyandworth.com)

# Tualatin River Watershed Council

## Marketing and Funding Strategy

The Tualatin River Watershed Council's main source of operational funding has historically been through Oregon Watershed Enhancement Board (OWEB). Funding for the 2013-2015 biennium will continue, but as OWEB looks to funnel their limited resources to the State's top functioning watershed councils, there is uncertainty if this operational funding will continue. It is imperative that Tualatin River Watershed Council look to more self-sustaining financial future with broader engagement from the community.

The Watershed Council is seeking a grant from the Clackamas Soil and Water Conservation District to fund the development of a Marketing and Funding Strategy. Following is the proposed workscope, schedule and budget for consultant support.

### **Scope of Work**

#### **Task 1 – Project Kickoff & Coordination**

Convene a startup meeting with Tualatin River Watershed Council's Steering Committee to confirm project objectives, and desired outcomes, consultant tasks and timeline. Refine the work plan and schedule as warranted.

Identify the client / consultant "project team" who will be assigned to steer the project and conduct strategic planning. The project team will meet at key intervals to ensure the strategic plan remains on-course and on-schedule.

*Deliverables:* Refined scope of work, schedule and budget

#### **Task 2 – Preliminary Research**

With Tualatin River Watershed Council assistance, the consultant will compile and review key documents: the Council's 2013-2015 Workplan, past strategic / action plans; program information and statistics; direction-setting documents from partner organizations; public opinion research; and other reports. The consultant will also develop a list of other organizations that could be potential partners or funding sources, along with school programs that have a potential to provide student interns for the Watershed Council's communications and marketing program.

*Deliverables:* Annotated list of source documents and implications for Tualatin River Watershed Council Marketing and Funding Strategy and a list of potential partner organizations and/or funding sources.

#### **Task 3 – Communications Assessment**

The consultant team will review the Council's existing program materials, publications and communications tools, and perform a focused "best practices" scan of peer marketing programs.

*Deliverables:* Communications assessment summary

#### **Task 4 – Online Stakeholder Survey**

Invite a cross-section of internal and external stakeholders who have some knowledge of the Watershed Council's mission and programs to participate in an online survey. Internal stakeholders include current and former Watershed Council board members and staff. External stakeholders include landowners, representatives of environmental and conservation groups, natural resource educators and leaders of educational institutions and public officials.

Survey questions will be developed in consultation with the Watershed Council Steering Committee and outlined in a discussion guide. Topics will center on the organization's current mission, accomplishments, strategic focus, priorities for future programs / projects / communications, funding and potential to refine the organization's communications strategy to create broader community engagement and foster a more self-sustaining financial future. Communication themes and messages will also be tested.

*Deliverables:* Summary of stakeholder survey results and preliminary themes and messages

#### **Task 5 – Steering Committee Workshop**

The consultant will organize and facilitate a half-day workshop to engage the Watershed Council's Steering Committee and staff in confronting and resolving options for the future funding and marketing opportunities.

*Deliverables:* Workshop notes

#### **Task 6 – Marketing and Funding Strategy**

Planning will culminate in preparation of a strategic plan that documents the process, results and decisions, assignments (including the potential for activities to be completed by student interns) and sets direction for the 2013-2015 biennium. The draft strategic plan developed by the consultant will be reviewed by the Watershed Council's Steering Committee and staff, revised and distributed to the Watershed Council for review.

The Marketing and Funding Strategy will be designed to be accessible to partners, constituents, government policymakers and lay readers. The consultant will also prepare a one-page executive summary to assist the Watershed Council in communicating the highlights to external audiences.

*Deliverables:* Draft and final Marketing and Funding Strategy

### ***Project Schedule***

The preliminary five-month schedule (below) will be refined in consultation with the Watershed Council Steering Committee once funding has been secured.

Month 1	Consultant Notice-to-Proceed
Month 1	Task 1 – Project Kickoff & Coordination
Month 2	Task 2 – Preliminary Research
	Task 3 – Communications Assessment
Month 3	Task 4 – Online Stakeholder Survey
Month 4	Task 5 – Steering Committee Workshop
Month 5	Task 6 – Marketing and Funding Strategy

Note: Watershed Council meets the first Wednesday of the month.

**Budget Estimate**

**Professional Services**

Barney & Worth, Inc. \$16,280

**Direct Expenses \***

Printing & Photocopies \$250  
Telecommunications 100  
Postage & Delivery 50  
Meeting Expenses 450  
Travel 450  
Insurance 100

Total Direct Expenses \$1,400

Total \$17,680

Donated by Barney & Worth, Inc. \$10,000

**Total Fee for Tualatin River Watershed Council \$7,680**

\*Assumes client will be responsible for mass printing and distribution of reports and printed materials; room rental and refreshments for meetings.

**Hours by Task**

Tasks	Clark Worth	Libby Barg	Erin Wiedeman	Clerical / Support
Task 1 – Project Kickoff & Coordination	4	8	2	1
Task 2 – Preliminary Research	4	8	2	1
Task 3 – Communications Assessment	2	8	2	1
Task 4 – Online Stakeholder Survey	4	12	4	1
Task 5 – Steering Committee Workshop	4	12	2	4
Task 6 – Marketing and Funding Strategy	2	8	2	4

**Hourly Rates for Professional Services**

Principal \$190  
Senior Associate \$160  
Associate \$130  
Research Associate \$110  
Clerical/Support \$80