

RESOLUTION NO. 2024-16

A RESOLUTION APPROVING A PROPOSAL FROM SSW CONSULTING FOR STRATEGIC PLANNING SERVICES & AUTHORIZING THE CITY MANAGER TO EXECUTE A PROFESSIONAL SERVICES AGREEMENT

WHEREAS, the City seeks to engage with SSW Consulting for assistance in its efforts to develop a five-year Strategic Plan; and

WHEREAS, the Rockaway Beach Code Chapter 30 provides that the City Council delegates contracting power to the City Manager for items up to \$75,000.

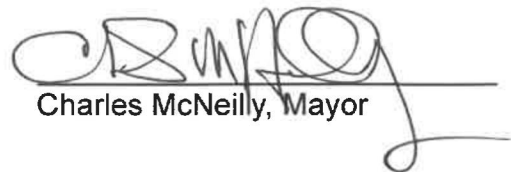
NOW, THEREFORE, BE IT RESOLVED THAT

Section 1. The City of Rockaway Beach City Council hereby approves the proposal from SSW Consulting for strategic planning attached as Exhibit A, and authorizes the City Manager to execute a Professional Services Agreement for the project.

Section 2. This Resolution shall be effective immediately upon adoption.

APPROVED AND ADOPTED BY THE CITY COUNCIL THE 14TH DAY OF FEBRUARY 2024.

APPROVED


Charles McNeilly, Mayor

ATTEST


Melissa Thompson, City Recorder

CITY OF ROCKAWAY BEACH STRATEGIC PLANNING SERVICES

PROPOSAL
JANUARY 10, 2024



SSW CONSULTING



SSW CONSULTING

January 10, 2024

City of Rockaway Beach
Attn. Luke Shepard, City Manager
Email: citymanager@corb.us

Dear Mr. Shepard,

Thank you for your time to discuss the opportunity of working with the City of Rockaway Beach in developing a five-year strategic plan. The SSW team is pleased to present the project approach based on the project outcomes identified during our call earlier this month. These outcomes include:

- » Develop a five-year vision and strategic plan for the community
- » Identify the values that will guide the organization in achieving the vision and supporting the mission.
- » Build a cohesive team amongst the organization and Council that is aligned around shared five-year goals.
- » Conduct inclusive community engagement to inform the development of the plan and build support for implementation.

The proposal includes ideas for how this process could be implemented, and if the city decides to move ahead with this work, we would look forward to discussing these ideas with you further and developing a fun, creative approach for engaging your Council and organization throughout the strategic planning process.

The proposal also includes information about the firm, the team's professional background, and our experience. At SSW Consulting, we have a passion for building great communities and organizations, and we would welcome the opportunity to work with you and the Rockaway Beach team. Thank you for your consideration, and please do not hesitate to reach out with any questions or requests for additional information.

Sincerely,

Sara Singer Wilson, Principal/Owner
sara@sarasingerwilson.com
503.305.5067

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ABOUT SSW

SSW CONSULTING

SSW is a Portland, Oregon based consulting firm offering facilitation and strategic planning services for organizations, teams, and individuals. We help leaders develop beautiful, thriving communities and engaging, supportive organizations.

Guided by the belief that engagement should be fun, SSW takes a creative approach to their work. Using the practice of graphic facilitation, we draw on our clients' mission, vision, and values to bring them together and build relationships that get work done.

While serving a variety of clients, SSW specializes in working with local governments. Even after working in the public sector for the last two decades, we are still in awe of the hardworking, dedicated people who sign up to serve their communities. We love being able to help these community-minded individuals do their jobs better in whatever big or small ways we can. We love to see how the passion of a committed organization, team, or individual paired with a plan for action can create positive change in the world.

Our approach to workshops and Council retreats/strategic planning has been outlined in the project approach. We strive to create a collaborative process that is customized based on each client's needs while also bringing our expertise and best practices that we've learned over the years to benefit your team. We are experienced in hosting in-person and virtual workshops. Our clients benefit from the visuals used in the virtual environment to simulate a similar workshop experience to that of being in-person.

We work with the project team to customize the project approach, communication protocols and expectations for providing counsel and recommendations. These expectations will be outlined during the scoping meeting and revisited occasionally throughout the process to ensure communication is flowing freely and our project goals are being fulfilled.

SSW PROJECT TEAM

SARA SINGER WILSON PRINCIPAL/OWNER SSW CONSULTING

Sara spent 15 years working directly in local government serving communities in Missouri, Kansas, California and Oregon where she honed her skills in community building. In 2015, she began serving local governments as a consultant where she has led community visioning and strategic planning projects for both large and small communities. She is an expert facilitator who can guide groups through conversations while also bringing the conversations to life through the technique of graphic facilitation. Sara uses the power of visualization through her use of graphics and illustrations to bring meetings and concepts to life. She has been trained as a graphic facilitator, and uses her facilitation skills, creativity, and graphic work to summarize meetings and enhance outreach efforts.



Sara has a future-oriented, dynamic, and collaborative leadership style that can bring people together. Through her extensive work in local government and with various community groups and stakeholders, Sara understands the importance of genuine and authentic engagement and establishing strong connections between constituents and leadership. These relationships can manifest powerful community change when paired with vision and goals developed through the process of strategic planning or community visioning. She has experienced this in working with clients such as the City of Tualatin's Tualatin Tomorrow Community Vision, the City of Lincoln City's Imagine Lincoln City Community Vision, and the City of Hillsboro's 2035 Community Plan.

Sara maintains active involvement in professional associations including the International City/County Management Association, the Oregon City/County Management Association, and other professional groups. She has served on various professional association committees and participated in conferences as a facilitator, planner, and speaker.

EXPERIENCE

- » Principal/Owner, SSW Consulting, August 2017 to present
- » Vice President, J Robertson and Company (JRO + Co.), October 2015 to December 2017
- » Deputy City Manager, City of Tualatin, OR, February 2011 to October 2015
- » Senior Administrative Analyst, City of Rancho Palos Verdes, CA, March 2008- February 2011
- » Other local government positions held with City of Shawnee, KS, City of Mission Hills, KS, City of Merriam, KS, and City of Brentwood, MO

EXPERTISE

- » Community Visioning
- » Strategic Planning
- » Graphic Facilitation
- » Community Engagement
- » Communications Strategy
- » Project Management
- » Strengths Based Leadership

EDUCATION + TRAINING

- » Bachelor of Science, Political Science, Benedictine College, Atchison, KS
- » Master of Public Administration, University of Kansas, Lawrence, KS
- » Total Strength Deployment Inventory (TotalSDI)/Core Strengths Certified Facilitator
- » Advanced Visual Facilitation/Designing + Leading Change/Strategic Planning, The Grove Consultants International
- » Certified Facilitator, Mid-America Regional Council

ASHLEY SONOFF ASSOCIATE SSW CONSULTING

Ashley has over a decade of progressive responsibility developing and implementing policy and programs in organizations of varying sizes in the public, nonprofit, and private sectors. Highly skilled in strategic planning, data analytics, and community engagement, she enjoys using these skills to implement innovative approaches to enhance public programs and services.

Ashley is a people person through and through and enjoys building effective working relationships to have fun while accomplishing great things together. One of her favorite parts of government work is engaging with the community to build trust, enhance accountability, and support good governance.

Ashley is an active member of the International City/County Management Association (ICMA) and the Oregon City/County Management Association (OCCMA).



EXPERIENCE

- » Associate, SSW Consulting, December 2019 to Present
- » Administrative Analyst, City of Gresham, OR, November 2016 to October 2019
- » ICMA Local Government Management Fellow, City of Gresham and Multnomah County, OR, July 2016 to November 2016
- » Policy and Performance Municipal Graduate Intern, City of Seattle, WA, June 2015 to September 2015
- » International Information Management Assistant, World Concern, August 2013 to September 2014
- » Financial Analyst, Indiana University, August 2012 to May 2013
- » Key Account Planning Analyst, Sunrise Greetings/Hallmark Cards, July 2011 to August 2012
- » Global Buyer/Operations Specialist/International Account Services, Columbia Sports-wear, June 2008 to June 2011

EXPERTISE

- » Strategic Planning
- » Data Analytics
- » Program Evaluation
- » Project Management
- » Community Engagement

EDUCATION

- » Master of Public Administration, University of Washington, Seattle, WA
- » Bachelor of Arts, International Studies, George Fox University, Newberg, OR

PROJECT EXPERIENCE

CITY OF HERMISTON STRATEGIC PLANNING

For the past eight years, SSW has served as the facilitator and strategy advisor for the Hermiston, Oregon (pop. 17,000). Annually, we have conducted a retreat with the City Council and Management Team. Over the years, the agendas and activities have varied for the team based on current issues in the community and the needs of the organization and Council. The retreats have included the development of team vision and values, team building activities, Core Strengths training, environmental scans to identify current community issues and drivers of change, celebrations of prior year accomplishments, and goal setting for the future.

In 2020, the SSW Consulting team supported Hermiston team in the development of their community vision to

serve as the community's road map over the next 20 years. The development of the **Resilient 2024** has been used as the foundation for Council goal setting to support the advancement of the vision. The focus of the retreat has shifted from developing the vision and building an effective team to identifying specific goals and strategies that support the community vision and address current community needs.

CITY OF HILLSBORO GOAL SETTING WORKSHOP

For the last four years, SSW facilitated the City of Hillsboro's (pop. 108,000) City Council and Management Team goal setting workshop. Over the four years, the sessions have included diversity, equity and inclusion training, celebration and recognition of the City's accomplishments, developing a shared community context to set the stage for goal-setting, and the launch of the City's strategic plan update.

SSW is currently working with the City on the strategic plan update which will serve as the foundation for the Council's annual goal setting and the development of the City's biennial budget.



CITY/COUNTY INSURANCE SERVICES (CIS) STRATEGIC PLAN

SSW Consulting began working with CIS in 2019 to assist the organization with the update of their Strategic Plan. Working with CIS staff and their Board of Trustees, SSW facilitated several workshops over the course of five months to develop a focused and updated strategic plan. The plan included high-level goals, strategies and implementation structure with broad support from the Board of Trustees and all levels of the organization. SSW developed an engagement strategy to build buy-in at every phase of development of the plan which translated into accountability across the organization upon completion of the plan.

SSW has assisted CIS in their annual progress review of the plan. We reviewed the goals, strategies, progress and challenges. Working with the CIS Executive Team, we outlined potential recommendations for plan updates for Board consideration. In 2021, SSW supported the CIS Marketing Team in scoping and implementation of one of their strategic plan strategies. SSW facilitated the process to develop four marketing plans for each business unit within the organization. This process was conducted virtually over Zoom while using visual tools to graphically facilitate the workshops.

The SSW team is currently supporting CIS in the 2024 5-year update of the strategic plan which includes the engagement of staff, the Board of Trustees and the city and county members across the State of Oregon.



SSW CLIENTS

We have a number of long-term and repeat clients with local governments and other organizations as you will notice in the client/project list below.

- » City of Hood River Homelessness Strategic Plan (2020)
- » City of Tualatin Goal Setting Workshop (2019, 2024), Tualatin Tomorrow Vision, America's Best Communities Revitalization Plan (2016-2018)
- » City of Stayton Goal Setting Workshop (2019, 2023)
- » City of Hermiston Goal Setting Workshops (2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024)
- » City of Hermiston Community Vision (2020/2021)

- » City of Hillsboro Goal Setting Workshop (2020, 2021, 2022, 2023, 2024), Hillsboro Parks and Recreation Commission Strategic Plan (2020/2021/2023), City of Hillsboro Strategic Plan (2022)
- » City of Forest Grove Goal Setting Workshop and Mid-year Retreat (Feb. 2020, Sept. 2020, 2021, 2022, 2023, 2024)
- » City/County Insurance Services Strategic Plan (January 2020, 2024), CIS Strategic Plan Annual Update (2021, 2022, 2023) Marketing Plans (2021)
- » Happy Valley City Council Retreats and Goal Setting Workshops (2016, 2019, 2020)
- » Hood River County Strategic Plan 2020-2021, 2023
- » Mercer Island City Council Team Building (2018)
- » City of North Plains City Council Retreat (2019, 2023)
- » City of Talent Goal Setting Workshop (2020)
- » City of Yachats Goal Setting Workshop (2020)
- » City of Wilsonville Park Board Prioritization Workshop (2019), Parks Bond Task Force Facilitation + Management (2020), City Council Goal Setting (2021, 2023), Sister City Advisory Board Strategic Plan (2021)
- » City of Florence Executive Team Training (2020/2021)
- » City of McMinnville Department Team Training (2020), City Council Team Building and Core Strengths Training (2021)
- » City of Albany Strategic Plan (2021/2022), Core Strengths Training (2018, 2020)
- » City of Cornelius City Council Goal Setting (2021)
- » City of Gresham Pathways to Employment Strategic Plan (2017), Community Engagement Strategic Plan (2018), Community Engagement Training (2019), Gresham Strategic Plan Engagement Support (2022)
- » Multnomah County Drainage District Strategic Plan (2019), Plan Updates and Implementation Support (2019-2020)
- » City of Oregon City Council Goal Setting (2021)
- » City of Sandy City Council Goal Setting (2021)
- » City of Scappoose City Council Orientation (2021), Council Goal Setting (2022, 2023, 2024)
- » City of Tigard City Council Goal Setting and Core Strengths Training (2021, 2023), Council Ground Rules Workshop (2021)
- » Bend Parks and Recreation District Diversity, Equity and Inclusion Strategy (2021)
- » NW Women's Leadership Academy Core Strengths Training and Strategic Planning (2018, 2019, 2020, 2021)
- » Columbia Memorial Hospital Strategic Plan (2022)
- » City and Borough of Sitka, Alaska Strategic Plan (2022, 2023)
- » City of Bend Council Goal Setting (2023)
- » City of Beaverton Council Goal Setting and Governance Training (2022, 2023, 2024)
- » City of Mankato, Minnesota Strategic Plan (2023-2024)
- » City of The Dalles City Council Goal Setting (2023)
- » City of Vernonia City Council Training (2023)
- » City of Monmouth City Council Goal Setting (2023)
- » City of Independence City Council Goal Setting (2023)
- » Washington County Strategic Planning Support (2023)
- » Clackamas County Facilitation Services (2022/2023)

PROJECT APPROACH

This approach outlines a strategic planning process that includes the City Council and City organization in the development of shared goals, an action plan, and implementation structure to bring the plan to life. The process will build on the City's previous planning work and will seek to achieve the following goals:

- » Develop a five-year vision and strategic plan for the community
- » Identify the values that will guide the organization in achieving the vision and supporting the mission.
- » Build a cohesive team amongst the organization and Council that is aligned around shared five-year goals.
- » Conduct inclusive community engagement to inform the development of the plan and build support for implementation.

The process is estimated to take about 6-7 months to complete depending on the organization's capacity and the alignment of project milestones with city processes. Strategic planning is a useful tool to guide an organization and Governing Body in aligning the allocation of resources with their long-term vision and strategic goals during the annual budget process. SSW will work with the city to ensure the project goals and timelines align with the team's desired outcomes and the organization's processes.

SSW Consulting brings the unique skill of graphic facilitation to our work to help teams envision the big picture and move beyond the discussion to visualizing their plan. All workshops will be facilitated using graphic facilitation, which is the fusion of large-scale notetaking with meeting management. SSW will capture the discussion including areas of agreement and decisions and use this in the meeting summaries and final reports. Graphic facilitation helps increase individual and group retention of the meeting information, buy-in and takeaways. The final piece of art gives the group a unique way to share their accomplishments with others or revisit their process with recall of key points.

The purpose of a strategic plan is to set priorities and help the organization focus their energy and resources towards these priorities. When a strategic plan is developed with an engaged and supportive team, it can strengthen operations and ensure teams are working towards common goals. It does this by establishing agreements around intended outcomes and results, and it provides a mechanism to assess and adjust direction in response to a changing environment.

A strategic plan also helps organizations make decisions and take action that shape and guide what an organization is, who it serves, what it does, and why it does it with a focus on the future – defining or realigning with a mission, vision, and values.

The strategic plan may consider community engagement, as well as new input from the City Council and the City organization. It can account for addressing community needs as well as internal organizational needs. It provides high level goals and an action plan with strategies to advance the goals. Each strategy at a minimum has a project lead identified and a timeline for implementation. Additionally, some plans may identify key partners, progress/performance indicators, success measures, etc. A strategic plan will also outline a process for implementation which will include the structure for progress reporting, plan updates, and other key steps to ensure the plan remains a living, dynamic document to guide the organization and team.

The tasks on the following pages describe a process based on the goals outlined. During the planning and scoping phase, we will discuss the approach and determine any revisions to ensure the process meets the project goals, addresses challenges, and leverages the strengths of the organization and community.

PROJECT APPROACH + SCHEDULE

TASK 1: SCOPING + PLANNING

SSW will meet with city project team members to refine the project goals, work plan and schedule. As part of this meeting, participants will clarify project expectations, challenges, success measures, key stakeholders, and identify background information for consultant review. The SSW team will review all pertinent documents, reports, and other background information related to Rockaway Beach's strategic planning work including any previous goals, reports, and other City planning documents.

As part of this meeting with staff, SSW will develop a project game plan and charter to outline goals, team members, timelines, and expectations. We will also review the organization's key stakeholder groups and discuss ideas and goals for the communications and engagement strategy.

SSW will develop a communication and engagement plan to connect with all stakeholders. The plan will identify the engagement goals, target audiences, proposed engagement tools, and key messages to communicate and engage stakeholders in the strategic planning process.

The plan will include a stakeholder map, identifying the various community groups, organizations, and individuals that we want to target during the engagement process. To ensure broad engagement of all segments of the community, the plan will include demographic information to align our engagement efforts to reach all segments of the community. The plan will also include a list of engagement tools and techniques for engaging the City's stakeholders. Using our engagement expertise and the input from staff, we will build tools and techniques that have proven success in Rockaway Beach. We want to build on and expand the engagement network that already exists. We will also gather input on the project brand and key messages. A consistent project brand and message will be critical in engaging the community and building awareness for the strategic plan.

This plan will be shared with the strategic planning team and shared at the strategic planning workshop for review and additional input.

Task 1 Tasks + Deliverables:

- Meet with Project Team
- Develop Project Charter
- Develop Graphic Work Plan and Schedule
- Identify Key Stakeholders + Engagement Goals
- Communications + Engagement Plan

Task 1 Timeline:

March - April 2024

TASK 2: STRATEGIC PLAN WORKSHOP

SSW proposes kicking off the strategic plan engagement with a workshop for department heads, city council, and any other key staff. SSW will facilitate a full-day strategic planning workshop with the Council and Leadership Team. In preparation for the workshop, the SSW team will conduct outreach which may include interviews with elected officials and department heads/Leadership Team via phone or virtually. These interviews will assist in developing an agenda and materials for a strategic planning workshop. SSW will ask team members about challenges, opportunities, organizational/community strengths, and potential threats on the horizon. We will also identify each stakeholders' expected outcomes for the process and gather input on workshop formats. The interviews not only inform the first team workshop, but they also provide a valuable opportunity to develop trust and rapport with each team member.

Following the interviews, SSW will present a summary of the interview themes and findings to the project team. These themes will shape the workshop agenda and ensure expectations and outcomes are aligned with the agenda topics and sequence. We will work with the project team to finalize the agenda, background materials, and discuss any logistics (e.g., audio/visual, room set-up, special presenters, etc.). The workshop could include both

strategic planning discussions/exercises and team-building activities. We will explore topics which might include:

Rockaway Beach's History: This exercise allows us to explore the history of the organization and consider where we've been before we explore where we are heading in the future. It orients the group to a larger historical context of its work, explores how the past can inform future direction, inspires and reenergizes the team, and serves as a springboard for analyzing the current situation and envisioning the future.

Shared Context: This discussion will result in a context map that identifies what is currently happening in the community/organization. We might explore current challenges, the economic climate, community trends or needs, political factors, technology factors and more. We will explore the themes that emerge which will help us begin thinking about goals we want to set for the future.

Idea Mapping: This discussion would include a mapping of all ideas that emerged during the previous discussions. The ideas will present themes that will serve as the basis of the strategic plan. We will begin to discuss potential goals and desired outcomes of these goals.

Task 2 Tasks + Deliverables:

- Conduct Interviews with Council + Leadership Team
- Prepare + Present Outreach Themes to Project Team
- Prepare for Strategic Planning Workshop
- Facilitate Workshop (including presentations, group discussions, and team building exercises)
- Conduct Workshop Debrief + Prepare Summary

Task 2 Timeline:

May-June 2024

TASK 3: STRATEGIC PLAN ENGAGEMENT

Using the input gathered from the Strategic Planning Workshop, we will finalize the Communications and Engagement Plan which will direct the outreach and communication activities for the duration of the project.

The project brand, key messages, stakeholder map, and engagement tools will be presented in a final Communications and Engagement Plan that will include our strategy and timeline for gathering the engagement data needed to develop the Strategic Plan.

We will work alongside staff to conduct engagement, and we will support the development of a variety of outreach tools to be outlined in the Communications and Engagement Plan. The outreach approach for each group will be designed to be culturally and generationally appropriate. The SSW team understands the value of inclusive engagement, and we will propose a mix of activities and approaches to ensure broad and diverse participation from across the community. Our approach assumes ideas would be solicited under a standard set of questions and later sorted into emerging themes.

We will support staff in conducting the outreach, bringing our skills and expertise wherever needed to begin gathering ideas. We will also design engagement activities that will involve the City organization. Staff have a unique community perspective that can often be overlooked during a community engagement process. In delivering services, they are Rockaway Beach experts, and their input is of great value to the strategic planning process. It is important to engage them and build support for the plan, as they will likely be tasked with implementing actions in the future.

The Communications and Engagement Plan will also include an evaluation process for each engagement tool. Measuring the results is critical to ensuring our engagement techniques are successful. Wherever possible, we will evaluate the engagement efforts and adjust our strategy as needed.

All the information gathered during the engagement process will be organized and sorted by emerging themes into a database. We will analyze the data and look for community trends, opportunities, and challenges. Using this data, the SSW team will develop draft content for the plan. Content will include a summary of public engagement activities, community trends/opportunities/challenges, mission, vision, values, goal statements, and potential

actions organized by theme.

The engagement summary and draft mission, vision, values, and goals will be presented to the Council for their review and input.

Task 3 Tasks + Deliverables:

Finalize Communications + Engagement Plan
 Develop Outreach Tools
 Community Engagement Support
 Engagement Summary + Draft Plan Content (Mission, Vision, Values, Goals)
 Engagement Database
 Present Mission, Vision, Values, + Goals to Council

Task 3 Timeline:

June - July 2024

TASK 4: STRATEGIC PLAN DEVELOPMENT

Using the direction from the City Council, the mission, vision, values, and goals will be refined with City staff. SSW will facilitate a 1/2-day workshop with the Leadership team to engage the team on the Strategic Plan draft goals and begin the goal refinement process and the development of an action plan. The team will use their technical expertise and knowledge of other City Master Plans to align actions/strategies with goals. The team will also discuss and outline an implementation structure for the plan goals and actions. SSW will provide implementation recommendations for the team's consideration. The draft strategic plan will be developed in preparation for the Council review.

Task 4 Tasks + Deliverables:

Prepare for Leadership Team Workshop
 Facilitate Half-Day Workshop
 Prepare Draft Strategic Plan

Task 4 Timeline:

August 2024

TASK 5: STRATEGIC PLAN REVIEW + ADOPTION

Once the draft has been finalized, it will be presented to the Council for their review and input. A draft of the plan will be circulated for community review prior to the final updates. The Council input and community review comments will be reviewed by staff and used to make updates to the draft plan.

A final draft plan will be prepared and presented to the Council for adoption. A visual summary can be developed to include in the final report. These graphics have been used effectively in other organizations to provide a visual poster of the strategic plan goals and actions.

SSW can assist with strategic plan implementation, staff training, and progress reporting tasks. These items can be added to the scope of work or scoped as the next phase following the adoption of the plan depending on the organizational support needed.

Task 5 Tasks + Deliverables:

Present Draft Strategic Plan to City Council
 Circulate Plan for Community Review
 Incorporate Edits and Prepare Final Strategic Plan
 Prepare Summary Graphic
 Present to Council for Approval/Adoption
 Prepare Implementation Memorandum

Task 5 Timeline:

September - October 2024

WORK EFFORT + COSTS

Please see the estimated cost proposal below. The Client will be billed for hours worked and reimbursable expenses. Expenses will be billed for reimbursement at cost. Additional services can be contracted for optional tasks, reports, or work outside of this scope based on a description of services provided by the City of Rockaway Beach. The costs for additional services will be based on the hourly rates listed below:

Sara Singer Wilson, Principal/Owner	\$200/hr
Ashley Sonoff, Associate	\$130/hr
Sasha Konell, Communications and Engagement Strategist	\$110/hr

Tasks	Sara Singer Wilson \$200/hr	Ashley Sonoff \$130/hr	Sasha Konell \$110/hr	Cost
Task 1: Scoping + Planning	3	3	6	\$1,650.00
Task 2: Strategic Plan Workshop	16	0	16	\$4,960.00
Task 3: Strategic Plan Engagement	8	8	28	\$5,720.00
Task 4: Strategic Plan Development	10	15	15	\$5,600.00
Task 5: Strategic Plan Review + Adoption	10	5	10	\$3,750.00
Ongoing Project Tasks/Costs				
Project Admin	10	8	15	\$4,690.00
Graphic Design + Engagement Materials	-	-	-	\$1,000.00
CONSULTANT HOURS				
	57	39	90	186
TOTAL CONSULTANT FEES				
	\$11,400.00	\$5,070.00	\$9,900.00	
EXPENSES (Facilitation supplies, travel, etc.)				\$800.00
GRAND TOTAL				\$28,170.00

REFERENCES

The project references listed below can attest to SSW's facilitation, leadership, and project management capabilities.

SHERILYN LOMBOS

Tualatin City Manager

Phone: 503.691.3010

Email: slombos@tualatin.gov

PATRICK PRIEST

City/County Insurance Services Executive Director

Phone: 503.763.3810

Email: Ppriest@cisoregon.org

BYRON SMITH

Hermiston City Manager

Phone: 541.567.5521

Email: bsmith@hermiston.or.us



SSW CONSULTING

January 10, 2024

City of Rockaway Beach
Attn. Luke Shepard, City Manager
Email: citymanager@corb.us

Dear Mr. Shepard,

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Sincerely,

Sara Singer Wilson, Principal/Owner
sara@sarasingerwilson.com
503.305.5067

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Our approach to workshops and Council retreats/strategic planning has been outlined in the project approach. We strive to create a collaborative process that is customized based on each client's needs while also bringing our expertise and best practices that we've learned over the years to benefit your team. We are experienced in hosting in-person and virtual workshops. Our clients benefit from the visuals used in the virtual environment to simulate a similar workshop experience to that of being in-person.

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SSW PROJECT TEAM

SARA SINGER WILSON PRINCIPAL/OWNER SSW CONSULTING

Sara spent 15 years working directly in local government serving communities in Missouri, Kansas, California and Oregon where she honed her skills in community building. In 2015, she began serving local governments as a consultant where she has led community visioning and strategic planning projects for both large and small communities. She is an expert facilitator who can guide groups through conversations while also bringing the conversations to life through the technique of graphic facilitation. Sara uses the power of visualization through her use of graphics and illustrations to bring meetings and concepts to life. She has been trained as a graphic facilitator, and uses her facilitation skills, creativity, and graphic work to summarize meetings and enhance outreach efforts.



Sara has a future-oriented, dynamic, and collaborative leadership style that can bring people together. Through her extensive work in local government and with various community groups and stakeholders, Sara understands the importance of genuine and authentic engagement and establishing strong connections between constituents and leadership. These relationships can manifest powerful community change when paired with vision and goals developed through the process of strategic planning or community visioning. She has experienced this in working with clients such as the City of Tualatin's Tualatin Tomorrow Community Vision, the City of Lincoln City's Imagine Lincoln City Community Vision, and the City of Hillsboro's 2035 Community Plan.

Sara maintains active involvement in professional associations including the International City/County Management Association, the Oregon City/County Management Association, and other professional groups. She has served on various professional association committees and participated in conferences as a facilitator, planner, and speaker.

EXPERIENCE

- » Principal/Owner, SSW Consulting, August 2017 to present
- » Vice President, J Robertson and Company (JRO + Co.), October 2015 to December 2017
- » Deputy City Manager, City of Tualatin, OR, February 2011 to October 2015
- » Senior Administrative Analyst, City of Rancho Palos Verdes, CA, March 2008- February 2011
- » Other local government positions held with City of Shawnee, KS, City of Mission Hills, KS, City of Merriam, KS, and City of Brentwood, MO

EXPERTISE

- » Community Visioning
- » Strategic Planning
- » Graphic Facilitation
- » Community Engagement
- » Communications Strategy
- » Project Management
- » Strengths Based Leadership

EDUCATION + TRAINING

- » Bachelor of Science, Political Science, Benedictine College, Atchison, KS
- » Master of Public Administration, University of Kansas, Lawrence, KS
- » Total Strength Deployment Inventory (TotalSDI)/Core Strengths Certified Facilitator
- » Advanced Visual Facilitation/Designing + Leading Change/Strategic Planning, The Grove Consultants International
- » Certified Facilitator, Mid-America Regional Council

ASHLEY SONOFF ASSOCIATE SSW CONSULTING

Ashley has over a decade of progressive responsibility developing and implementing policy and programs in organizations of varying sizes in the public, nonprofit, and private sectors. Highly skilled in strategic planning, data analytics, and community engagement, she enjoys using these skills to implement innovative approaches to enhance public programs and services.

Ashley is a people person through and through and enjoys building effective working relationships to have fun while accomplishing great things together. One of her favorite parts of government work is engaging with the community to build trust, enhance accountability, and support good governance.

Ashley is an active member of the International City/County Management Association (ICMA) and the Oregon City/County Management Association (OCCMA).



EXPERIENCE

- » Associate, SSW Consulting, December 2019 to Present
- » Administrative Analyst, City of Gresham, OR, November 2016 to October 2019
- » ICMA Local Government Management Fellow, City of Gresham and Multnomah County, OR, July 2016 to November 2016
- » Policy and Performance Municipal Graduate Intern, City of Seattle, WA, June 2015 to September 2015
- » International Information Management Assistant, World Concern, August 2013 to September 2014
- » Financial Analyst, Indiana University, August 2012 to May 2013
- » Key Account Planning Analyst, Sunrise Greetings/Hallmark Cards, July 2011 to August 2012
- » Global Buyer/Operations Specialist/International Account Services, Columbia Sports-wear, June 2008 to June 2011

EXPERTISE

- » Strategic Planning
- » Data Analytics
- » Program Evaluation
- » Project Management
- » Community Engagement

EDUCATION

- » Master of Public Administration, University of Washington, Seattle, WA
- » Bachelor of Arts, International Studies, George Fox University, Newberg, OR

PROJECT EXPERIENCE

CITY OF HERMISTON STRATEGIC PLANNING

For the past eight years, SSW has served as the facilitator and strategy advisor for the Hermiston, Oregon (pop. 17,000). Annually, we have conducted a retreat with the City Council and Management Team. Over the years, the agendas and activities have varied for the team based on current issues in the community and the needs of the organization and Council. The retreats have included the development of team vision and values, team building activities, Core Strengths training, environmental scans to identify current community issues and drivers of change, celebrations of prior year accomplishments, and goal setting for the future.

In 2020, the SSW Consulting team supported Hermiston team in the development of their community vision to

serve as the community's road map over the next 20 years. The development of this plan has subsequently been used as the foundation for Council goal setting to support the advancement of the vision. The focus of the retreat has shifted from developing the vision and building an effective team to identifying specific goals and strategies that support the community vision and address current community needs.

CITY OF HILLSBORO GOAL SETTING WORKSHOP

For the last four years, SSW facilitated the City of Hillsboro's (pop. 108,000) City Council and Management Team goal setting workshop. Over the four years, the sessions have included diversity, equity and inclusion training, celebration and recognition of the City's accomplishments, developing a shared community context to set the stage for goal-setting, and the launch of the City's strategic plan update.

SSW is currently working with the City on the strategic plan update which will serve as the foundation for the Council's annual goal setting and the development of the City's biennial budget.



CITY/COUNTY INSURANCE SERVICES (CIS) STRATEGIC PLAN

SSW Consulting began working with CIS in 2019 to assist the organization with the update of their Strategic Plan. Working with CIS staff and their Board of Trustees, SSW facilitated several workshops over the course of five months to develop a focused and updated strategic plan. The plan included high-level goals, strategies and implementation structure with broad support from the Board of Trustees and all levels of the organization. SSW developed an engagement strategy to build buy-in at every phase of development of the plan which translated into accountability across the organization upon completion of the plan.

SSW has assisted CIS in their annual progress review of the plan. We reviewed the goals, strategies, progress and challenges. Working with the CIS Executive Team, we outlined potential recommendations for plan updates for Board consideration. In 2021, SSW supported the CIS Marketing Team in scoping and implementation of one of their strategic plan strategies. SSW facilitated the process to develop four marketing plans for each business unit within the organization. This process was conducted virtually over Zoom while using visual tools to graphically facilitate the workshops.



The SSW team is currently supporting CIS in the 2024 5-year update of the strategic plan which includes the engagement of staff, the Board of Trustees and the city and county members across the State of Oregon.

SSW CLIENTS

We have a number of long-term and repeat clients with local governments and other organizations as you will notice in the client/project list below.

- » City of Hood River Homelessness Strategic Plan (2020)
- » City of Tualatin Goal Setting Workshop (2019, 2024), Tualatin Tomorrow Vision, America's Best Communities Revitalization Plan (2016-2018)
- » City of Stayton Goal Setting Workshop (2019, 2023)
- » City of Hermiston Goal Setting Workshops (2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024)
- » City of Hermiston Community Vision (2020/2021)

- » City of Hillsboro Goal Setting Workshop (2020, 2021, 2022, 2023, 2024), Hillsboro Parks and Recreation Commission Strategic Plan (2020/2021/2023), City of Hillsboro Strategic Plan (2022)
- » City of Forest Grove Goal Setting Workshop and Mid-year Retreat (Feb. 2020, Sept. 2020, 2021, 2022, 2023, 2024)
- » City/County Insurance Services Strategic Plan (January 2020, 2024), CIS Strategic Plan Annual Update (2021, 2022, 2023) Marketing Plans (2021)
- » Happy Valley City Council Retreats and Goal Setting Workshops (2016, 2019, 2020)
- » Hood River County Strategic Plan 2020-2021, 2023
- » Mercer Island City Council Team Building (2018)
- » City of North Plains City Council Retreat (2019, 2023)
- » City of Talent Goal Setting Workshop (2020)
- » City of Yachats Goal Setting Workshop (2020)
- » City of Wilsonville Park Board Prioritization Workshop (2019), Parks Bond Task Force Facilitation + Management (2020), City Council Goal Setting (2021, 2023), Sister City Advisory Board Strategic Plan (2021)
- » City of Florence Executive Team Training (2020/2021)
- » City of McMinnville Department Team Training (2020), City Council Team Building and Core Strengths Training (2021)
- » City of Albany Strategic Plan (2021/2022), Core Strengths Training (2018, 2020)
- » City of Cornelius City Council Goal Setting (2021)
- » City of Gresham Pathways to Employment Strategic Plan (2017), Community Engagement Strategic Plan (2018), Community Engagement Training (2019), Gresham Strategic Plan Engagement Support (2022)
- » Multnomah County Drainage District Strategic Plan (2019), Plan Updates and Implementation Support (2019-2020)
- » City of Oregon City Council Goal Setting (2021)
- » City of Sandy City Council Goal Setting (2021)
- » City of Scappoose City Council Orientation (2021), Council Goal Setting (2022, 2023, 2024)
- » City of Tigard City Council Goal Setting and Core Strengths Training (2021, 2023), Council Ground Rules Workshop (2021)
- » Bend Parks and Recreation District Diversity, Equity and Inclusion Strategy (2021)
- » NW Women's Leadership Academy Core Strengths Training and Strategic Planning (2018, 2019, 2020, 2021)
- » Columbia Memorial Hospital Strategic Plan (2022)
- » City and Borough of Sitka, Alaska Strategic Plan (2022, 2023)
- » City of Bend Council Goal Setting (2023)
- » City of Beaverton Council Goal Setting and Governance Training (2022, 2023, 2024)
- » City of Mankato, Minnesota Strategic Plan (2023-2024)
- » City of The Dalles City Council Goal Setting (2023)
- » City of Vernonia City Council Training (2023)
- » City of Monmouth City Council Goal Setting (2023)
- » City of Independence City Council Goal Setting (2023)
- » Washington County Strategic Planning Support (2023)
- » Clackamas County Facilitation Services (2022/2023)

PROJECT APPROACH

This approach outlines a strategic planning process that includes the City Council and City organization in the development of shared goals, an action plan, and implementation structure to bring the plan to life. The process will build on the City's previous planning work and will seek to achieve the following goals:

- » Develop a five-year vision and strategic plan for the community
- » Identify the values that will guide the organization in achieving the vision and supporting the mission.
- » Build a cohesive team amongst the organization and Council that is aligned around shared five-year goals.
- » Conduct inclusive community engagement to inform the development of the plan and build support for implementation.

The process is estimated to take about 6-7 months to complete depending on the organization's capacity and the alignment of project milestones with city processes. Strategic planning is a useful tool to guide an organization and Governing Body in aligning the allocation of resources with their long-term vision and strategic goals during the annual budget process. SSW will work with the city to ensure the project goals and timelines align with the team's desired outcomes and the organization's processes.

SSW Consulting brings the unique skill of graphic facilitation to our work to help teams envision the big picture and move beyond the discussion to visualizing their plan. All workshops will be facilitated using graphic facilitation, which is the fusion of large-scale notetaking with meeting management. SSW will capture the discussion including areas of agreement and decisions and use this in the meeting summaries and final reports. Graphic facilitation helps increase individual and group retention of the meeting information, buy-in and takeaways. The final piece of art gives the group a unique way to share their accomplishments with others or revisit their process with recall of key points.

The purpose of a strategic plan is to set priorities and help the organization focus their energy and resources towards these priorities. When a strategic plan is developed with an engaged and supportive team, it can strengthen operations and ensure teams are working towards common goals. It does this by establishing agreements around intended outcomes and results, and it provides a mechanism to assess and adjust direction in response to a changing environment.

A strategic plan also helps organizations make decisions and take action that shape and guide what an organization is, who it serves, what it does, and why it does it with a focus on the future – defining or realigning with a mission, vision, and values.

The strategic plan may consider community engagement, as well as new input from the City Council and the City organization. It can account for addressing community needs as well as internal organizational needs. It provides high level goals and an action plan with strategies to advance the goals. Each strategy at a minimum has a project lead identified and a timeline for implementation. Additionally, some plans may identify key partners, progress/performance indicators, success measures, etc. A strategic plan will also outline a process for implementation which will include the structure for progress reporting, plan updates, and other key steps to ensure the plan remains a living, dynamic document to guide the organization and team.

The tasks on the following pages describe a process based on the goals outlined. During the planning and scoping phase, we will discuss the approach and determine any revisions to ensure the process meets the project goals, addresses challenges, and leverages the strengths of the organization and community.

PROJECT APPROACH + SCHEDULE

TASK 1: SCOPING + PLANNING

SSW will meet with city project team members to refine the project goals, work plan and schedule. As part of this meeting, participants will clarify project expectations, challenges, success measures, key stakeholders, and identify background information for consultant review. The SSW team will review all pertinent documents, reports, and other background information related to Rockaway Beach's strategic planning work including any previous goals, reports, and other City planning documents.

As part of this meeting with staff, SSW will develop a project game plan and charter to outline goals, team members, timelines, and expectations. We will also review the organization's key stakeholder groups and discuss ideas and goals for the communications and engagement strategy.

SSW will develop a communication and engagement plan to connect with all stakeholders. The plan will identify the engagement goals, target audiences, proposed engagement tools, and key messages to communicate and engage stakeholders in the strategic planning process.

The plan will include a stakeholder map, identifying the various community groups, organizations, and individuals that we want to target during the engagement process. To ensure broad engagement of all segments of the community, the plan will include demographic information to align our engagement efforts to reach all segments of the community. The plan will also include a list of engagement tools and techniques for engaging the City's stakeholders. Using our engagement expertise and the input from staff, we will build tools and techniques that have proven success in Rockaway Beach. We want to build on and expand the engagement network that already exists. We will also gather input on the project brand and key messages. A consistent project brand and message will be critical in engaging the community and building awareness for the strategic plan.

This plan will be shared with the strategic planning team and shared at the strategic planning workshop for review and additional input.

Task 1 Tasks + Deliverables:

- Meet with Project Team
- Develop Project Charter
- Develop Graphic Work Plan and Schedule
- Identify Key Stakeholders + Engagement Goals
- Communications + Engagement Plan

Task 1 Timeline:

March - April 2024

TASK 2: STRATEGIC PLAN WORKSHOP

SSW proposes kicking off the strategic plan engagement with a workshop for department heads, city council, and any other key staff. SSW will facilitate a full-day strategic planning workshop with the Council and Leadership Team. In preparation for the workshop, the SSW team will conduct outreach which may include interviews with elected officials and department heads/Leadership Team via phone or virtually. These interviews will assist in developing an agenda and materials for a strategic planning workshop. SSW will ask team members about challenges, opportunities, organizational/community strengths, and potential threats on the horizon. We will also identify each stakeholders' expected outcomes for the process and gather input on workshop formats. The interviews not only inform the first team workshop, but they also provide a valuable opportunity to develop trust and rapport with each team member.

Following the interviews, SSW will present a summary of the interview themes and findings to the project team. These themes will shape the workshop agenda and ensure expectations and outcomes are aligned with the agenda topics and sequence. We will work with the project team to finalize the agenda, background materials, and discuss any logistics (e.g., audio/visual, room set-up, special presenters, etc.). The workshop could include both

strategic planning discussions/exercises and team-building activities. We will explore topics which might include:

Rockaway Beach's History: This exercise allows us to explore the history of the organization and consider where we've been before we explore where we are heading in the future. It orients the group to a larger historical context of its work, explores how the past can inform future direction, inspires and reenergizes the team, and serves as a springboard for analyzing the current situation and envisioning the future.

Shared Context: This discussion will result in a context map that identifies what is currently happening in the community/organization. We might explore current challenges, the economic climate, community trends or needs, political factors, technology factors and more. We will explore the themes that emerge which will help us begin thinking about goals we want to set for the future.

Idea Mapping: This discussion would include a mapping of all ideas that emerged during the previous discussions. The ideas will present themes that will serve as the basis of the strategic plan. We will begin to discuss potential goals and desired outcomes of these goals.

Task 2 Tasks + Deliverables:

- Conduct Interviews with Council + Leadership Team
- Prepare + Present Outreach Themes to Project Team
- Prepare for Strategic Planning Workshop
- Facilitate Workshop (including presentations, group discussions, and team building exercises)
- Conduct Workshop Debrief + Prepare Summary

Task 2 Timeline:

May-June 2024

TASK 3: STRATEGIC PLAN ENGAGEMENT

Using the input gathered from the Strategic Planning Workshop, we will finalize the Communications and Engagement Plan which will direct the outreach and communication activities for the duration of the project.

The project brand, key messages, stakeholder map, and engagement tools will be presented in a final Communications and Engagement Plan that will include our strategy and timeline for gathering the engagement data needed to develop the Strategic Plan.

We will work alongside staff to conduct engagement, and we will support the development of a variety of outreach tools to be outlined in the Communications and Engagement Plan. The outreach approach for each group will be designed to be culturally and generationally appropriate. The SSW team understands the value of inclusive engagement, and we will propose a mix of activities and approaches to ensure broad and diverse participation from across the community. Our approach assumes ideas would be solicited under a standard set of questions and later sorted into emerging themes.

We will support staff in conducting the outreach, bringing our skills and expertise wherever needed to begin gathering ideas. We will also design engagement activities that will involve the City organization. Staff have a unique community perspective that can often be overlooked during a community engagement process. In delivering services, they are Rockaway Beach experts, and their input is of great value to the strategic planning process. It is important to engage them and build support for the plan, as they will likely be tasked with implementing actions in the future.

The Communications and Engagement Plan will also include an evaluation process for each engagement tool. Measuring the results is critical to ensuring our engagement techniques are successful. Wherever possible, we will evaluate the engagement efforts and adjust our strategy as needed.

All the information gathered during the engagement process will be organized and sorted by emerging themes into a database. We will analyze the data and look for community trends, opportunities, and challenges. Using this data, the SSW team will develop draft content for the plan. Content will include a summary of public engagement activities, community trends/opportunities/challenges, mission, vision, values, goal statements, and potential

actions organized by theme.

The engagement summary and draft mission, vision, values, and goals will be presented to the Council for their review and input.

Task 3 Tasks + Deliverables:

Finalize Communications + Engagement Plan
 Develop Outreach Tools
 Community Engagement Support
 Engagement Summary + Draft Plan Content (Mission, Vision, Values, Goals)
 Engagement Database
 Present Mission, Vision, Values, + Goals to Council

Task 3 Timeline:

June - July 2024

TASK 4: STRATEGIC PLAN DEVELOPMENT

Using the direction from the City Council, the mission, vision, values, and goals will be refined with City staff. SSW will facilitate a 1/2-day workshop with the Leadership team to engage the team on the Strategic Plan draft goals and begin the goal refinement process and the development of an action plan. The team will use their technical expertise and knowledge of other City Master Plans to align actions/strategies with goals. The team will also discuss and outline an implementation structure for the plan goals and actions. SSW will provide implementation recommendations for the team's consideration. The draft strategic plan will be developed in preparation for the Council review.

Task 4 Tasks + Deliverables:

Prepare for Leadership Team Workshop
 Facilitate Half-Day Workshop
 Prepare Draft Strategic Plan

Task 4 Timeline:

August 2024

TASK 5: STRATEGIC PLAN REVIEW + ADOPTION

Once the draft has been finalized, it will be presented to the Council for their review and input. A draft of the plan will be circulated for community review prior to the final updates. The Council input and community review comments will be reviewed by staff and used to make updates to the draft plan.

A final draft plan will be prepared and presented to the Council for adoption. A visual summary can be developed to include in the final report. These graphics have been used effectively in other organizations to provide a visual poster of the strategic plan goals and actions.

SSW can assist with strategic plan implementation, staff training, and progress reporting tasks. These items can be added to the scope of work or scoped as the next phase following the adoption of the plan depending on the organizational support needed.

Task 5 Tasks + Deliverables:

Present Draft Strategic Plan to City Council
 Circulate Plan for Community Review
 Incorporate Edits and Prepare Final Strategic Plan
 Prepare Summary Graphic
 Present to Council for Approval/Adoption
 Prepare Implementation Memorandum

Task 5 Timeline:

September - October 2024

WORK EFFORT + COSTS

Please see the estimated cost proposal below. The Client will be billed for hours worked and reimbursable expenses. Expenses will be billed for reimbursement at cost. Additional services can be contracted for optional tasks, reports, or work outside of this scope based on a description of services provided by the City of Rockaway Beach. The costs for additional services will be based on the hourly rates listed below:

Sara Singer Wilson, Principal/Owner	\$200/hr
Ashley Sonoff, Associate	\$130/hr
Sasha Konell, Communications and Engagement Strategist	\$110/hr

Tasks	Sara Singer Wilson \$200/hr	Ashley Sonoff \$130/hr	Sasha Konell \$110/hr	Cost
Task 1: Scoping + Planning	3	3	6	\$1,650.00
Task 2: Strategic Plan Workshop	16	0	16	\$4,960.00
Task 3: Strategic Plan Engagement	8	8	28	\$5,720.00
Task 4: Strategic Plan Development	10	15	15	\$5,600.00
Task 5: Strategic Plan Review + Adoption	10	5	10	\$3,750.00
Ongoing Project Tasks/Costs				
Project Admin	10	8	15	\$4,690.00
Graphic Design + Engagement Materials	-	-	-	\$1,000.00
CONSULTANT HOURS				
	57	39	90	186
TOTAL CONSULTANT FEES				
	\$11,400.00	\$5,070.00	\$9,900.00	
EXPENSES (Facilitation supplies, travel, etc.)				\$800.00
GRAND TOTAL				\$28,170.00

REFERENCES

The project references listed below can attest to SSW's facilitation, leadership, and project management capabilities.

SHERILYN LOMBOS

Tualatin City Manager

Phone: 503.691.3010

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PATRICK PRIEST

City/County Insurance Services Executive Director

Phone: 503.763.3810

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BYRON SMITH

Hermiston City Manager

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