

## PERSONAL SERVICES AGREEMENT

|                         |  |
|-------------------------|--|
| <b>Contractor</b>       | <b>SSW Consulting, LLC</b>                             |
| <b>Consideration</b>    | <b>\$12,745.00</b>                                     |
| <b>Effective Date</b>   | September 1, 2024                                      |
| <b>Completion Date</b>  | March 3, 2024  |
| <b>Project/Services</b> | <i>City Council Goal-Setting Facilitation Services</i> |

This PERSONAL SERVICES AGREEMENT (**Agreement**) is entered by the City of The Dalles, an Oregon municipal corporation (**City**) and SSW Consulting, LLC, a domestic limited liability company (**Contractor**), for Contractor's provision of City Council goal-setting facilitation services to the City.

**WHEREAS**, the City requires performance of certain personal services; and

**WHEREAS**, Contractor desires to perform those certain personal services pursuant to the compensation and conditions set forth herein.

**NOW, THEREFORE**, in consideration of both the provisions set forth herein and other good and valuable consideration, the receipt and sufficiency of which is here acknowledged, the Parties agree:

### **A. Contractor's Duties**

1. Scope of Services. Contractor agrees, at its expense, to furnish all labor, equipment, materials, expertise, tools, supplies, insurance, licenses, reference and background data and information, including subconsultants approved under this Agreement, and provide any equipment necessary to perform all tasks described in Contractor's February 8, 2024, proposal, attached to and made part of this Agreement as **Exhibit A (Work)**. The Parties agree the Work shall be interpreted broadly to the City's benefit: Contractor agrees to perform all subordinate tasks not explicitly referenced in **Exhibit A** but necessary to fully and effectively perform those specifically listed tasks.
2. Insurance and Indemnity.
  - a. Contractor agrees, at its expense, to carry and maintain in effect throughout the Contract Term, at least, statutory **Workers' Compensation** coverage, **Comprehensive General Liability** insurance in the amount of \$1,000,000 (per occurrence) and \$2,000,000 (in aggregate), and **Commercial Automobile Liability** insurance (including coverage for all owned, hired, and non-owned vehicles) with a combined single limit per occurrence of \$1,000,000.
  - b. Contractor agrees to provide the City with certificates of insurance naming the *City of The Dalles* as an additional insured prior to commencement of the Work performed under this Agreement and to further provide the City 30 days' notice before cancelling any insurance policy contemplated by this Agreement.



- c. Contractor agrees it is solely responsible for maintaining proper and adequate Workers' Compensation coverage. If Contractor's insurance does not cover each and every subconsultant, certificates of insurance issued on policies covering each and every subconsultant shall be filed with the City prior to commencement of the Work, including any subcontract operations. Contractor shall provide the City with evidence it is either a *self-insured employer* or a *carrier-insured employer* for Workers' Compensation pursuant to ORS Chapter 656 prior to commencing any Work.
- d. Contractor agrees to indemnify, defend, and hold harmless the City, its officers, agents, and employees against all liability, loss, and costs arising from actions, suits, claims, or demands for Contractor's (including Contractor's officers, agents, employees, and subconsultants) acts or omissions in the performance of this Agreement.

3. Payments.

- a. Contractor agrees to promptly pay as due all persons supplying labor or materials for the prosecution of services or Work arising from this Agreement: if Contractor fails, neglects, or refuses to make prompt payment of any claim for labor or services furnished to Contractor (including subconsultants), the City may pay such a claim and charge the amount of its payment against funds actually or expectedly due from Contractor. The Parties agree payment of any claim in this manner shall not relieve Contractor or its surety from any obligations with respect to any unpaid claims.
- b. Contractor agrees to pay all employees at least time and half pay for all overtime worked in excess of 40 hours in any one work week, except for excluded individuals pursuant to ORS 653.010 to 653.261 or 29 U.S.C. 201 to 209.
- c. Contractor agrees to promptly pay as due all persons, co-partnerships, associations, or corporations furnishing medical, surgical, hospital care, or other needed care and attention incident to sickness or injury to Contractor's employees, or all sums which Contractor agrees to pay for such services, and all moneys and sums which Contractor collected or deducted from the wages of its employees pursuant to any law or contract for the purpose of providing or paying for such service.
- d. Contractor shall not permit any lien or claim to be filed or prosecuted against the City on account of any Work (including labor or materials) furnished under this Agreement.
- e. Contractor agrees to pay to the Oregon Department of Revenue all sums withheld from its employees pursuant to ORS 316.167.



## B. City's Duties

1. Compensation.
  - a. The City agrees to compensate Contractor for the Work in an amount not to exceed **\$12,745.00**, to be paid by check.
  - b. The City agrees to make payment upon Contractor's completion of the Work and delivery of an invoice detailing the Work, subject to the City's approval and no more frequently than monthly. Payment shall be made only for Work actually completed as of the invoice date.
  - c. Contractor agrees the City's payment of an invoice releases the City from any further obligation to compensate Contractor for the Work (including expenses) incurred as of the invoice date. The Parties agree payment shall not be considered acceptance or approval of the Work or waiver of any defects therein.
  - d. The City certifies sufficient funds are available and authorized for expenditure to finance the costs of this Agreement during the current fiscal year. The Parties agree appropriations for future fiscal years are subject to budget approval by the City Council.

## C. General Conditions

1. Time. The Parties agree time is of the essence to this Agreement's performance: Contractor's prosecution of the Work shall begin without undue delay on or after the Effective Date and shall be completed before or on the Completion Date.
2. Termination. This Agreement's term expires naturally upon the Parties' full performance or on the Completion Date (whichever first) unless sooner modified pursuant to this Agreement. The Parties agree the City may terminate this Agreement with seven (7) days' notice and Contractor may terminate this Agreement with thirty (30) days' notice, both without penalty. The City agrees to compensate Contractor for all approved services rendered prorated to the date the City notices its intent to terminate.
3. Tax Currency. Contractor agrees (and by executing this Agreement, certifies under penalty of perjury) it is, to the best of its knowledge, not in violation of any tax laws described in ORS 305.380.
4. Full Integration/Modification. This Agreement contains the Parties' entire understanding and intent and supersedes all prior negotiations, representations, or other written or oral agreements on this matter. The Parties agree this Agreement may only be modified by a written instrument duly executed by the Parties.
5. Independent Contractor. The Parties agree Contractor is an *independent contractor* as defined by ORS 670.600(2) and as interpreted by regulations promulgated by the Oregon Bureau of Labor and Industries. Neither the terms of this Agreement nor the course of its performance by the Parties shall be construed as implicating an employer-employee relationship. Contractor expressly warrants its exclusive agency



free from City direction and control over the means and manner of completing the Work.

6. Assignment/Delegation. The Parties agree no Party shall assign or transfer an interest or duty under this Agreement without the other Party's written consent and any attempted assignment or delegation without written consent shall be invalid.
7. Subconsultants. Contractor agrees to provide the City with a list of proposed subconsultants before awarding any subcontract connected with the Work or this Agreement and shall not retain any subconsultant the City reasonably objects to as incompetent or unfit. Contractor agrees it is as fully responsible to the City for its subconsultants' and employees' (whether directly or indirectly employed) negligent acts and omissions as it is for its employees' negligent acts and omissions. The Parties agree nothing in this Agreement is intended to or shall create any contractual privity between the City and any subconsultant.
8. Enforceability. The Parties agree all disputes connected with this Agreement or its performance shall be heard in the Circuit Court of the State of Oregon for the County of Wasco and any resolutions shall be construed under the laws of the State of Oregon. If any provision of this Agreement is held invalid and unenforceable, the remaining provisions shall be valid and binding upon the Parties.
9. Waiver. The Parties agree a Party's failure to insist upon strict adherence to a provision of this Agreement on any occasion shall not be considered a waiver of the Party's rights or deprive the Party of the right to thereafter insist upon strict adherence to the provision or any other provision of this Agreement.
10. Notices. All notices required or permitted to be given under this Agreement shall be deemed given and received two (2) days after deposit in the United States Mail, certified or registered form, postage prepaid, return receipt requested, and addressed:

*To the City:* City Manager  
City of The Dalles  
313 Court Street  
The Dalles, OR 97058

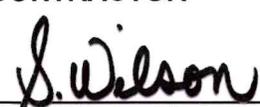
*To Contractor:* Managing Member  
SSW Consulting, LLC  
644 North State Street, Suite 1  
Lake Oswego, OR 97034

**IN WITNESS WHEREOF**, the Parties duly execute this **PERSONAL SERVICES AGREEMENT** this 10<sup>th</sup> day of January, 2024.

**CITY OF THE DALLES**

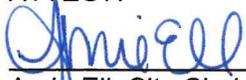
  
\_\_\_\_\_  
Matthew B. Klebes, City Manager

**CONTRACTOR**

  
\_\_\_\_\_  
Sara Wilson, Managing Member

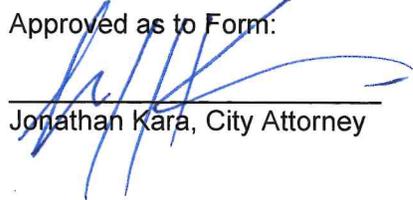


ATTEST:



Amie Ell, City Clerk

Approved as to Form:



Jonathan Kara, City Attorney



# CITY OF THE DALLES CITY COUNCIL GOAL-REFINEMENT FACILITATION SERVICES

PROPOSAL  
FEBRUARY 8, 2024



SSW CONSULTING

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SARASINGERWILSON.COM | 503.305.5067 | SARA@SARASINGERWILSON.COM  
644 N. STATE STREET, STE. 1, LAKE OSWEGO, OR 97034



## SSW CONSULTING

February 8, 2024

City of The Dalles  
Attn. Matthew Klebes  
Email: mklebes@ci.the-dalles.or.us

Dear Matthew,

Thank you for inviting us back to continue working with the City of The Dalles for their 2025 Council Goal-Refinement process. I have developed a proposed scope of work and fee estimate based on the facilitation services we discussed as we wrapped up the 2024 goal-setting work.

Key outcomes:

- » Work with the City Council and Leadership Team to refine their 2024 high level policy goals and supporting actions to guide the organization aligned with the City's recently adopted 2040 vision.
- » Conduct team building that fosters alignment around the Council's goals and supports a high performing team to advance the goals
- » Develop a summary report of the Council goals, action plan, and any team agreements.

Continuous team building work paired with a graphically facilitated goal-refinement workshop will help the team align around shared policy goals and work as a cohesive team to move their shared vision forward in the coming years. Please review the proposal and let me know if you have any questions or suggestions for ensuring the scope of work aligns with the team's desired outcomes.

With my passion for building great communities and organizations, I am excited to continue this work with the The Dalles team. Please do not hesitate to contact me with any questions or requests for additional information.

Sincerely,

Sara Singer Wilson  
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 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

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. 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, Strategic Visioning, The Grove Consultants International
- » Certified Facilitator, Mid-America Regional Council

## **ASHLEY SONOFF ASSOCIATE**

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

## **SASHA KONELL** **COMMUNICATIONS + ENGAGEMENT STRATEGIST**



Sasha joins our SSW team with just over five years of local government communications expertise, and insightful knowledge of public relations, community engagement, and events. With extensive communication skills, attention to detail, and her passion for collaboration, community, and connection, she brings an enlightening energy for engagement to the table.

Sasha's love for people and storytelling contributes to her ability to effectively communicate and disseminate abstract concepts and curate intentional ways to connect. She is a student of people—constantly yearning to learn more about community culture, relationship and trust building, and best communication practices to ensure equity and inclusion. Her strong interpersonal skills support her ability to work with organizations and communities to resolve conflict and work towards resolution and meaningful outcomes.

### **EXPERIENCE**

- » Communications + Event Planning, SK Co, 2014 – 2023
- » Community Engagement + Event Specialist, City of Gresham, 2018 – 2023
- » Office Management, Konell Construction, 2011 – 2018

### **EXPERTISE**

- » Communications
- » Community Engagement
- » Community Branding
- » Event Planning + Coordination
- » Social Media Content Development
- » Project Management

### **EDUCATION**

- » Bachelor of Arts, Communications, Eastern Oregon University, La Grande, OR
- » Basic Public Information Officer Certified, FEMA, 2019

## PROJECT EXPERIENCE

### CITY OF HERMISTON COUNCIL + MANAGEMENT TEAM RETREAT

For the past six years, SSW has served as the facilitator and strategy advisor for the Hermiston, Oregon (pop. 17,000) City Council and Management Team Retreat. 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. Over the years, 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.



SSW Consulting is currently working with the Hermiston team to update their community vision to serve as the community's road map over the next 20 years.

### CITY OF HILLSBORO GOAL SETTING WORKSHOP

Over the last two years (2020/2021) SSW facilitated the City of Hillsboro's (pop. 108,000) City Council and Management Team goal setting workshop. In 2020, this workshop included the over 20 members of the City's Council and Senior Leadership Team. In 2021, due to the COVID-19 pandemic we engaged the staff leadership team virtually while conducting the goal setting workshop with the Council in-person. Over the two years, the sessions have included diversity, equity and inclusion training, celebration and recognition of the City's accomplishments, and developing a shared community context to set the stage for goal-setting. Working with the Council and leadership team, we have outlined high-level goals and supporting actions for the City to guide the organization's work.

### 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 assisted CIS in their 2021 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.



## 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, 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)
- » City of Hermiston Community Vision (2020/2021)
- » City of Hillsboro Goal Setting Workshop (2020, 2021, 2022, 2023), Hillsboro Parks and Recreation Commission Strategic Plan (2020, 2021, 2022), City of Hillsboro Strategic Plan 2021-Present
- » City of Forest Goal Setting Workshop and Mid-year Retreat (Feb. 2020, Sept. 2020, Jan. 2021, 2022, 2023)
- » City/County Insurance Services Strategic Plan (January 2020), 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), Strategic Plan Update (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), Strategic Plan Outreach (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, 2023)
- » City of Tigard City Council Goal Setting and Core Strengths Training (2021), Council Ground Rules Workshop (2021, 2023)
- » Bend Parks and Recreation District Diversity, Equity and Inclusion Strategy (2021)
- » City of Bend City Council Goal Setting (2023)
- » City of Beaverton City Council Goal Setting (2023)
- » City of Monmouth City Council Goal Setting (2023)
- » City of Independence City Council Goal Setting (2023)
- » City and Borough of Sitka Alaska Strategic Plan (2022)
- » NW Women's Leadership Academy Core Strengths Training and Strategic Planning (2018, 2019, 2020, 2021, 2022, 2023)
- » Columbia Memorial Hospital Strategic Plan (2022/2023)

# PROJECT APPROACH

## Outcomes:

- » Work with the City Council and Leadership Team to refine + identify high level policy goals and supporting actions to guide the organization aligned with the City's recently adopted 2040 vision.
- » Conduct team building that fosters alignment around the Council's goals and supports a high performing team to advance the goals
- » Develop a summary report of the Council goals, action plan, and any team agreements.

The Dalles team has identified November 15, 2024 as the tentative date for a workshop. The project approach assumes a full-day workshop and the final contract will reflect the confirmed dates and appropriate hours based on the workshop timing.

## **TASK 1: PROJECT SCOPING + PLANNING**

SSW will meet with key City staff to refine the project approach and schedule. As part of this meeting, participants will clarify project progress, challenges, opportunities and identify background information for consultant's review. The consultant will review all pertinent documents, reports, and other background information.

As part of this meeting with staff, SSW will develop a project game plan to define project goals, team members, timelines, potential challenges, success factors and expectations. It is also recommended the team discuss the outreach strategy for engaging the project stakeholders.

### **Deliverables + Key Tasks:**

- » Scoping meeting with City Manager and other project team members
- » Review background materials + 2024 goal progress updates
- » Develop project game plan and schedule
- » Prepare engagement strategy and interview questions

## **TASK 2: OUTREACH**

Conduct zoom or phone interviews with each Councilor in preparation for a goal refinement workshop. These interviews will assist in developing the agenda, identifying expected outcomes, and gathering input on the workshop format. The interviews also provide an opportunity to continue to build trust and rapport with each Councilor prior to our meeting. SSW will also conduct outreach with the City's Leadership team via survey or interviews. Staff's input is very valuable in ensuring the goals set are realistic and aligned with the City's other guiding plans, and account for other ongoing projects or work. Following the outreach conversations, an outreach summary will be developed capturing the themes.

Using the outreach themes and findings, SSW will develop a draft agenda to present to the City Manager. These themes will shape the workshop agendas, and ensure expectations and outcomes are aligned with the agenda topics and sequence.

SSW will meet with the Leadership team prior to the workshop to review the agenda and the themes from the outreach. This team meeting provides an opportunity to discuss the goal refinement workshop, address any staff questions, clarify staff's role, and gather any resources to provide to meeting participants.

Once the agenda has been approved, this will be distributed with any other meeting materials to all participants.

**Deliverables + Key Tasks:**

- » Conduct interviews with Mayor and Council
- » Outreach with Leadership Team (Survey, interviews and/or a staff meeting)
- » Prepare a summary of the outreach and proposed workshop agenda
- » Finalize all meeting materials and distribute to participants

### **TASK 3: WORKSHOP PREPARATION**

SSW will prepare the custom meeting materials to facilitate a 1-day workshop. We will coordinate a logistics plan and the preparation of any meeting materials or resources for the workshop. Graphic templates will be prepared using the themes from the interviews to set the context for the team building and goal setting.

**Deliverables + Key Tasks:**

- » Team building exercises
- » Logistics plan
- » Facilitation guide and graphic templates

### **TASK 4: WORKSHOP FACILITATION**

SSW will graphically facilitate the workshop. The workshop will be in-person and SSW will employ the use of graphic facilitation to capture the ideas and areas of agreement for the group.

At the completion of the workshop, SSW will review the summary information and prepare for a debrief with City staff. In the debrief meeting we will discuss the workshop outcomes and the next steps in developing the summary plan.

**Deliverables + Key Tasks:**

- » Facilitate workshop
- » Prepare workshop notes, graphics, and materials
- » Outline of summary report
- » Debrief meeting with City Manager

## TASK 5: SUMMARY REPORT

During the debrief with City staff, SSW will review the summary meeting documents and discuss the format of the summary report. We will determine if any additional meetings or follow up information is required to complete the report. Once all information has been gathered, SSW will prepare a draft summary report. This report can be presented to the Council, or it can be circulated via email for review and comment. All comments will be submitted to SSW, and the report will be updated accordingly. A final report will be prepared for review and approval by the Council.

A graphic summary of the goals will also be prepared to include in the report and provide to staff as separate JPEG and PNG files.

### **Deliverables + Key Tasks:**

- » Summary Report
- » Graphic Summary of the Goals

# COST PROPOSAL

These primary tasks can be completed for an amount not to exceed \$12,745, which includes all services and expenses (facilitation materials, administration costs, etc.). 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 The Dalles. The costs for additional services will be based on the hourly rates listed below:

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

Expenses will be billed for reimbursement at cost.

| Tasks  | Sara Sing-<br>er Wilson<br>\$200/hr | Ashley Sonoff<br>\$130/hr | Sasha Konell<br>\$110/hr | Cost               |
|--|-------------------------------------|---------------------------|--------------------------|--------------------|
| Task 1: Project Scoping + Planning               | 3                                   | 1                         | 4                        | \$1,170.00         |
| Task 2: Outreach                                 | 4                                   | 2                         | 6                        | \$1,720.00         |
| Task 3: Workshop Preparation                     | 4                                   | 0                         | 4                        | \$1,240.00         |
| Task 4: Workshop Facilitation                    | 15                                  | 1                         | 16                       | \$4,890.00         |
| Task 5: Summary Report                           | 3                                   | 5                         | 6                        | \$1,910.00         |
| <b>Ongoing Project Tasks/Costs</b>               |                                     |                           |                          |                    |
| Project Management + Administration              | 3                                   | 3                         | 5                        | \$1,540.00         |
| <b>CONSULTANT HOURS</b>                          | <b>32</b>                           | <b>12</b>                 | <b>41</b>                | <b>85</b>          |
| <b>TOTAL CONSULTANT FEES</b>                     | <b>\$6,400.00</b>                   | <b>\$1,560.00</b>         | <b>\$4,510.00</b>        |                    |
| EXPENSES (admin, facilitation supplies, mileage) |                                     |                           |                          | \$275.00           |
| <b>GRAND TOTAL</b>                               |                                     |                           |                          | <b>\$12,745.00</b> |