

REQUEST FOR QUALIFICATIONS

# MISSION SPRINGS WATER DISTRICT

for Strategic Planning Services



SUBMITTED FRIDAY, JULY 14, 2023, BY:

*Erin LaCombe*

Erin LaCombe  
President, CEO & Founder, CV Strategies  
erin@cvstrat.com | 760.641.0739

CV STRATEGIES

PRECISION IN PERCEPTION<sup>SM</sup>

Los Angeles • Palm Desert • Sacramento

CVSTRATEGIES.COM

July 14, 2023

Brian Macy, PE  
Mission Springs Water District  
66575 Second Street  
Desert Hot Springs, CA 92240

Dear Mr. Macy,

It is our privilege to present the attached proposal to the Mission Springs Water District. We understand your agency seeks to retain a consulting firm and professional partner to update your strategic plan and support its implementation, and we are well-qualified to assist you with this task.

To help the District establish a long-term vision and develop a five-year strategic plan, we acknowledge the need for community engagement through stakeholder meetings and an online survey. Additionally, we recognize the importance of Board engagement through a priority and goal-setting workshop, as well as employee engagement by gathering input from all levels of the organization.

CV Strategies is eager to collaborate with MSWD to identify goals, priorities and objectives and develop a strategic plan incorporating measurable, quantifiable goals and timetables for achievement. The team at our Palm Desert, California office will manage the project at a cost of \$35,000.

Our firm is well-prepared to lead this effort. We are a comprehensive communication and public engagement firm with extensive experience creating strategic plans for agencies such as yours. We are actively involved in ongoing planning and communications initiatives with more than 100 public agencies throughout the state, in addition to serving clients in the private, nonprofit, education and renewable energy sectors.

We look forward to your review of the attached proposal and are eager to get started on your strategic plan.

Sincerely,



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Erin LaCombe  
President, CEO & Founder  
CV Strategies  
73700 Dinah Shore Drive  
Palm Desert, CA 92211

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erin@cvstrat.com | 760.641.0739

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# PROJECT UNDERSTANDING

Establishing a strategic plan is essential for any well-run organization. The effort allows for a close examination of the mission and vision statements and core values, priorities and goals.

As part of the strategic planning process, CV Strategies will gather information in interviews and at workshops to identify internal strengths and weaknesses. This will involve looking ahead at potential challenges and opportunities. Our firm will garner feedback from executive management, the Board of Directors, staff and customers to guide the development of priorities and determine where to focus energy and resources.

The resulting multi-year strategic plan will strengthen operations, ensure employees are working toward common goals and inform decision-making. The plan will include timelines and benchmarks to keep Mission Springs Water District focused and on track for meeting the stated goals. It will address issues of key importance, including operations, finances, communications, public outreach, government relations, management, staffing and leadership.

The end goal: to strengthen operations and develop tools that allow for achievement of organizational objectives.

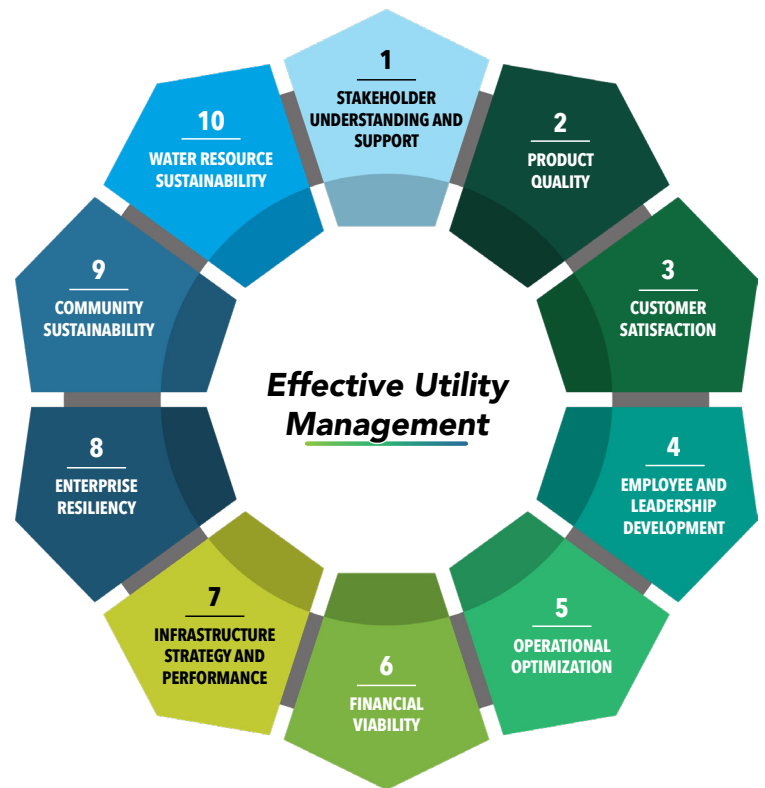


## BEST PRACTICES

As part of the process of crafting a strategic plan, CV Strategies considers industry best practices. For water and wastewater utilities, the Effective Utility Management (EUM) framework is a proven and widely used platform for assessing how well a utility organization is carrying out its core service mission. The EUM framework was developed over nearly a decade, with input from national utility organizations such as the American Water Works Association (AWWA), Water Environment Federation (WEF), National Association of Clean Water Agencies (NACWA) and the federal Environmental Protection Agency (EPA).

CV Strategies will incorporate attributes of the EUM framework to assess MSWD's effectiveness and efficiency as an organization. The framework will provide a comprehensive and balanced review of how well MSWD is doing, identify gaps between actual and preferred conditions, and narrow the focus to what actions must be taken to ensure the organization is highly functioning across the full spectrum of critical success factors.

The EUM Ten Attributes of Effectively Managed Water Sector Utilities attributes provide a clear set of reference points to help utilities proactively maintain a balanced focus on all operational areas rather than solely responding reactively to issues that arise.



# Background



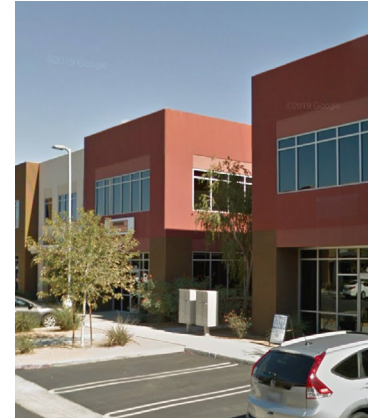
# FIRM'S QUALIFICATIONS

CV Strategies is a communications and community engagement firm that leverages expertise, influence and instincts to enhance the way public agencies tell their stories. Founded in 2007 by former television news director Erin LaCombe, CV Strategies helps clients blend media, messaging and audiences to connect with communities and drive support on the issues that matter. CV Strategies' staff of 14 is made up of former journalists, news executives, marketing experts and designers who use their storytelling skills to provide value to clients.

The firm is currently involved in active, ongoing communications initiatives with more than 100 public agencies across California. Our strategists provide support on issues as diverse as branding, website design, strategic planning, crisis communications, public education campaign architecture, and tactical outreach implementation. Our extensive experience makes us adept at crafting effective messaging for organizations with varying stories to tell.

The firm has developed conservation, education and engagement campaigns for clients across California. With offices in Palm Desert, Los Angeles, and Sacramento, our team members leverage their diverse expertise, contacts and skill sets to support water industry, energy and government clients. Our firm is deadline-oriented and driven to deliver updates and results that identify measurable targets and achieve progress throughout a project's scope.

We provide our clients with a diverse set of tactics to help them meet their outreach objectives with a wide variety of audiences. Through careful research, planning and strategic implementation, our specialists work closely with staff to create effective and innovative solutions to communication challenges. CV Strategies unites these elements to fulfill the organization's vision and ensure achievement of communication goals.



# THE CV STRATEGIES NEXUS



## WE UNDERSTAND PUBLIC AGENCIES.

With more than 100 current public agency clients across the state, CV Strategies consultants have an intimate knowledge of municipalities and special districts, and are well versed in the tactics that enhance customer engagement and messaging success.



## WE KNOW THE REGION.

We understand the unique relationships, communities, and issues of the region, as well as the messages that resonate with stakeholders. Additionally, our extensive portfolio of strategic communication initiatives for public sector clients throughout the state has fostered a deep understanding of the issues that impact California communities.



## WE ARE SKILLED STORYTELLERS.

Our backgrounds in journalism, advertising, design, film production and social media marketing have honed keen storytelling instincts that help create dynamic visuals and compelling copy.



## WE THINK HOLISTICALLY.

Our professionals are experienced in gathering and analyzing information in pursuit of a comprehensive and holistic strategic approach. The guidance and counsel we provide are engineered out of an in-depth understanding of client nuance and need.



## WE DO ALL OUR WORK IN-HOUSE.

CV Strategies offers a full suite of in-house creative services - concepting, copywriting, design, web production, photography, videography, social and digital media. This combined-services approach improves control of costs and deadlines, while close interaction between designers, copywriters and account coordinators results in deliverables that are cohesive, targeted and harmonious.



# References





# REFERENCES

## JURUPA COMMUNITY SERVICES DISTRICT

11201 Harrel Street, Jurupa Valley, CA, 91752

**CONTACT** Chris Berch, General Manager | [jberch@jcsd.us](mailto:jberch@jcsd.us) | 951.685.7434

JCSD partnered with CV Strategies in 2017 to develop a consensus-based strategic plan incorporating feedback from the Board of Directors, employees and the community. The five-year plan was delivered in June 2018.

## ROWLAND WATER DISTRICT

3021 Fullerton Road, Rowland Heights, CA 91748

**CONTACT** Tom Coleman, General Manager | [TColeman@rwd.org](mailto:TColeman@rwd.org) | 562.697.1726

When Rowland Water District entered the final stages of its third strategic plan in 2021, it turned to CV Strategies to facilitate and create its fourth strategic plan. Since the District was familiar with the process, CV Strategies inspired all stakeholders to think innovatively to create a vision that improved upon past successes. The latest strategic plan was adopted in March 2022.

## WEST COUNTY WASTEWATER

2910 Hilltop Drive, Richmond, CA 94806

**CONTACT** Andrew Clough, General Manager | [aclough@wccd.org](mailto:aclough@wccd.org) | 510.837.6221

CV Strategies worked with WCW starting in November 2019 to update its existing strategic plan and support implementation, delivering a five-year strategic plan in April 2020. As part of the process of crafting its Strategic Vision, West County Wastewater considered industry best practices. The plan relied on the Effective Utility Management (EUM) framework, a proven and widely used platform for assessing how well water and wastewater utilities carry out core services.



# Personnel



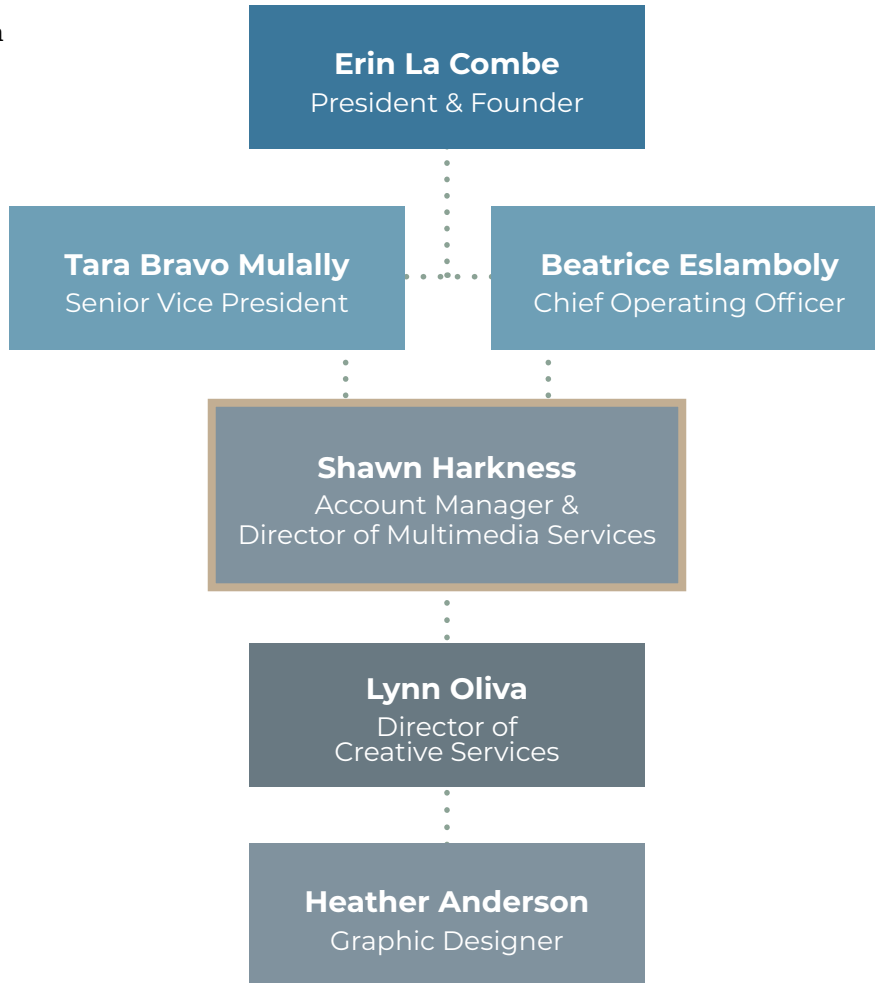
# PROJECT ORGANIZATIONAL STRUCTURE

## Key Contact/Project Manager:

Shawn Harkness

Ph: 727.631.7639

Email: shawn@cvstrat.com



## ABOUT THE PROJECT TEAM

CV Strategies President and Founder Erin LaCombe will serve as project director to ensure all objectives of the proposal are satisfied. Senior Vice President Tara Bravo provides guidance on execution and strategy while Shawn Harkness takes a hands-on approach as project manager, coordinating all team members to drive the project forward. Director of Creative Services Lynn Oliva will conceptualize and design the layout of the plan, with graphics support by Graphic Designer Heather Anderson.

The team and their percentage of time devoted to this project:

- **Project Director:** Erin La Combe, 10%
- **Project Advisor:** Tara Bravo Mulally, 30%
- **Project Manager:** Shawn Harkness, 40%
- **Creative Director:** Lynn Oliva, 40%
- **Graphics Support:** Heather Anderson, 20%

# ERIN LA COMBE

## PRESIDENT, CEO & FOUNDER

### EDUCATION

#### University of Southern California

Los Angeles, California

Bachelor of Arts Degree //  
Broadcast Journalism

### CAREER HIGHLIGHTS

**Kiner Communications // 2006-2007,**  
Vice President, Public Relations

**CBS 2 // 2002 -2006, News Director**

**KESQ TV, KUNA TV, KDFX TV //**  
1996 - 2002, News Director

**KESQ TV //**  
1995 - 1996, Assignment Manager/  
Managing Editor

**KESQ TV // 1995 - 1996, Assignment**  
Manager/Managing Editor

**KFWB AM // 1993 - 1995, News**  
Editor

### AFFILIATIONS

**The California Club //**  
Board Member

**FIND Food Bank //**  
Board Member

**California Utility Executive**  
**Management Association //**  
Board Member

**Jim Murray Memorial Foundation //**  
Board Member

### SELECT AWARDS

**Pacific Southwest Chapter Emmy //**  
June 2003  
Best Newscast Winner

**Pacific Southwest Chapter Emmy //**  
June 2004  
Best Newscast Winner

**Communicator Award Winner //**  
January 2006  
Breaking News

**Bill Stout Memorial Award of**  
**Excellence Winner //** March 2006

**Best Spot News Coverage Winner //**  
March 2006

An Emmy Award-winning journalist with over 25 years in the communications industry, Erin LaCombe is the President and Founder of CV Strategies, a Southern California strategic communications and public engagement firm serving corporate, government and non-profit clients.

Erin has led the communications and public affairs support team and overseen graphics development for myriad cities, water districts, and nonprofit organizations across the state for more than a decade. A talented mediator, she has provided guidance to numerous government agencies through the strategic planning process, leading workshops and providing key messaging strategies to gain positive public perception. Her insights into the minds of reporters and editors are often one step ahead of the story of the day, offering a highly valuable service that is difficult to match.

## PROJECT EXPERIENCE

**Coachella Valley Water District** – Chromium-6 Outreach, Palm Desert, California. Crafted direct mail pieces, quarterly updates and factsheets to educate customers about new state reporting threshold for drinking water. Facilitated community meetings, prepared public presentations and directed videos.

**Elsinore Valley Municipal Water District** – Variable Rates Outreach, Lake Elsinore, California. Led an extensive educational campaign for the District's move to variable sewer rates. The project included online content, FAQs, infographics, newsletter articles, bill inserts, mailers, social media and more.

**Desert Healthcare District** – COVID-19 Outreach, Palm Springs, California. Directs and manages a comprehensive educational effort that includes creation of an online Coachella Valley COVID-19 Resource Center, news releases, newsletter content, social media and media coverage.

**Hi-Desert Water District** – Sewer Assessment District, Yucca Valley, California. Guided the Hi-Desert Water District Water Reclamation Facility and sewer system outreach effort, securing a voter turnout of more than 50% and overwhelming total assessment voter approval of more than 70%. Tactics included designed ads and billboards, media ad buys, legislative document development, microsite creation and video production.

**Turlock Irrigation District** – FERC Relicensing, Turlock, California. Created a successful campaign to engage media, the community and ultimately the State Water Resources Control Board to support a science-based approach for relicensing Don Pedro Dam. The project involved a media-focused website, videos, factsheets and press relations.

**Byron-Bethany Irrigation District** – Water Rights Protection, Byron, California. Spearheaded a campaign that resulted in the protection of water rights for farming communities in the San Joaquin Valley. Work included video production, media relations, website creation and event organization to influence state decision-makers.

**College of the Desert** – State of the College, Palm Desert, California. Directed all outreach and strategic planning related to the president/superintendent's annual State of the College event for more than 200 regional thought leaders and influencers. The project involved advertising, content and design of a 60-page annual report, event planning, speech writing and numerous videos for the event presentation.

# TARA BRAVO MULALLY

## SENIOR VICE PRESIDENT

### EDUCATION

**California State University,  
East Bay**  
Hayward, California  
Bachelor of Science // Business  
Administration  
*Graduated Cum Laude*

**Cogswell Polytechnical  
College**  
Sunnyvale, California  
*Computer Arts Focus*

### AFFILIATIONS

**Association of California  
Water Agencies //**  
Communications Committee

**Friends of the Desert  
Mountains //**  
Board of Directors

### SELECT AWARDS

**ABA Stevie Award //**  
iEfficient  
*Water Conservation Website*

**PRSA Capella Award //**  
Elsinore Valley Municipal  
Water District  
*Notice of Public Hearing*

**PRSA Capella Award //**  
iEfficient  
*Water Conservation Campaign*

**CAPIO Award of Distinction //**  
East Valley Water District  
*Transitioning to Budget Based Rates*

**CAPIO Award of Merit //**  
Rowland Water District  
*Strategic Plan*

**CAPIO Award of Distinction //**  
Elsinore Valley Municipal  
Water District  
*Variable Sewer Outreach Plan*

Tara leads the staff at CV Strategies, where she guides the development and execution of communications and outreach campaigns for public agencies, nonprofits and corporations. She has served as the architect of multiple, complex outreach efforts that include enhanced website design, branding, strategic planning, water and wastewater rates outreach, video direction and communications training.

Tara's background in graphic design gives her a unique skill set and the ability to convey highly technical information in a visual format that provides added value to her work with clients. Since joining CV Strategies in 2010, Tara has proven herself as a skilled leader who helps clients successfully overcome their communications challenges.

### PROJECT EXPERIENCE

**United Water Conservation District** – Water Sustainability Summit 2020, Oxnard, California. Organized and facilitated a regional sustainability summit to foster collaboration in Ventura County. Speakers included Dorene D'Adamo, State Water Resources Control Board; Vic Nguyen, California Department of Water Resources; Assemblymember Jacqui Irwin (D-Thousand Oaks) and Catherine Freeman, Chief Consultant to the California State Assembly Water, Parks and Wildlife Committee. CV Strategies designed the event materials and presentations, as well as produced the historical and event recap videos.

**San Bernardino County Superintendent of Schools** – Rebrand and Website, San Bernardino, California. When one of the largest educational providers in California needed a new look, it turned to CV Strategies. Tara led the effort to rebrand the organization starting with employee focus groups and progressing to a new website, logo, collateral material templates and a style guide.

**West County Wastewater District** – Strategic Planning, Richmond, California. Led the strategic planning process, which included in-depth work sessions with executive staff and board members to identify priorities and initiatives. Those strategic elements were later incorporated into all district communications, including videos, newsletter articles and community events.

**Mission Springs Water District** – Assessment District, Desert Hot Springs, California. Implemented multiple successful assessment district outreach campaigns. Created “meeting-to-go” video, door hangers, bill inserts and surveys.

**California Special Districts Association** – Video Production and Outreach Plan, Sacramento, California. Directed a series of videos titled “What are Special Districts?” The educational segments were based on scripts and video shoots highlighting the work of special districts in the community.

**Helix Water District** – Rates & COVID-19 Outreach, La Mesa, California. Developed campaign framework elements including key messages, infographics and board talking points, provided media engagement strategies and campaign outreach plan, adjusting to current events with agility and alacrity.

**SCV Water** – Creation of a New Water Agency, Santa Clarita, California. Developed and facilitated community outreach regarding a potential merger and eventual dissolution of four agencies, creating a new larger agency in the process. Tactics included a microsite, townhall meetings with individualized workstations, branded campaign and surveys. This led to a complete branding process, including a new logo, website, letterhead, etc.

# SHAWN HARKNESS

## ACCOUNT MANAGER

### EDUCATION

**Mansfield University**  
Mansfield, Pennsylvania

Bachelor of Arts //  
Communication

*With an emphasis in  
broadcasting and a  
minor in music*

**Rhode Island College**  
Providence, Rhode Island

*Received college credits*

### AFFILIATIONS

**American Ground Water  
Trust //**  
Board of Directors

**American Red Cross of  
Montana //**  
*Board of Directors 2004*

### SELECT ACCOMPLISHMENTS

**2017 Southern California  
RTNA Golden Mike Award //**  
*Best Newscast*

**Poynter Institute, St.  
Petersburg, FL //**  
*"Leadership for TV & Radio  
News Directors" March 2003*

**RTNDA Communicator //**  
*"Tough Calls" opinion piece  
published June 2001*

**West Virginia Associated  
Press Broadcasters Award //**  
*"Best News Operation" 2000*

Shawn Harkness draws upon more than 25 years of experience in the communications industry to develop relatable and easy-to-understand messages. As a veteran television producer and manager with multiple top-rated broadcast stations, he offers a deep understanding of how to translate messages to achieve the greatest impact while utilizing video, print, web, social media and in-person communications.

Possessing an acute sense of narrative style and focused, targeted messaging that is adaptable to multiple industries, Shawn's high level of professionalism is reflected in his work. He an expert storyteller, giving clients an edge in communications development and outreach. Shawn is a results-oriented, natural leader who thrives in fast-paced environments and is committed to personal and organizational success.

### PROJECT EXPERIENCE

**City of Coachella** – Produced the State of the City presentation to residents and community leaders to highlight achievements and future goals of the City of Coachella. This project included speech writing, the supporting visual presentation, writing and field producing videos, coordinating production on the day of the event, pre- and post- event news releases and arranging media interviews for city leaders.

**Pico Water District** – Led PFAS outreach campaign to educate customers about water safety following changes to state water quality standards regarding PFOA and PFOS levels. Outreach included development of news releases, website updates, social media posts and direct mailings to residents to correct misinformation and provide accurate facts from credible outside sources.

**Leeward Renewable Energy / First Solar** – Serving as the public contact to maintain positive community relations before, during and after construction of utility scale solar projects in Rosamond, California. Community engagement effort includes face-to-face interactions to address neighbors about their concerns and in-person attendance at local government meetings to monitor public perceptions and respond as needed to project questions.

**Riverside Community College District** – Created LAUNCH program content for website and printed collateral to promote a new apprenticeship program for a group of community colleges. The work required presentation of complex information in a manner that was easy to understand and providing relevant information to potential students and local businesses that could benefit through participation in the program.

**City of Coachella** – Established social media as a primary means of interactive communication between the city and its residents. Through a regular schedule of creating and posting relevant content and by providing prompt responses to visitors' questions, the city's organic efforts more than doubled the number of social media followers in 2 years.

**College of the Desert** – Wrote the annual speech delivered by College of the Desert Superintendent/President Joel L. Kinnamon to campus and community leaders. The speech highlighted achievements of the past year while focusing on specific projects. The content and tone was carefully crafted to address an audience that included the Board of Trustees, local elected officials, key donors and community leaders.

**Zone 7 Water Agency** – Produced a series of educational videos to promote the services provided by this wholesale water district. This included field producing a multiple-day video shoot and writing scripts that resulted in visually compelling presentations.

# LYNN OLIVA

## DIRECTOR OF CREATIVE SERVICES

EDUCATION

**Art Institute of California**  
Inland Empire, California  
Bachelor of Science //  
*Graphic Design*

TECHNOLOGY

<b>Adobe Creative Suite //</b> <i>After Effects</i> <i>Audition</i> <i>Flash</i> <i>Illustrator</i> <i>InDesign</i> <i>Photoshop</i> <i>Premier Pro</i>	<b>Microsoft Office //</b> <i>Access</i> <i>Excel</i> <i>PowerPoint</i> <i>Word</i>
<b>Website Design //</b> <i>HTML/CCS</i> <i>Wix/Squarespace</i>	

SELECT ACCOMPLISHMENTS

**PRSA Capella Award //**  
Elsinore Valley Municipal  
Water District  
*Notice of Public Hearing*

**PRSA Polaris Award //**  
Elsinore Valley Municipal  
Water District  
*Water Quality Report*

**CAPIO Award of Excellence //**  
Elsinore Valley Municipal  
Water District  
*Water Quality Report*

**CAPIO Best in Show //**  
Rowland Water District  
*Newsletter*

With a deep understanding of the graphic design industry, Lynn combines professionalism and creativity to tap into her clients' visions and help them realize their goals. Working closely with various public agencies has helped Lynn develop an understanding of the intricacies of diverse communications techniques. With attention to detail and deadlines, Lynn's expertise flourishes in a communications environment.

A graduate of the Art Institute of California, Lynn is skilled in Photoshop, Illustrator, InDesign and After Effects, among others. Lynn understands the aesthetic value and care that must be put into print and web design to maximize business and customer satisfaction.

### PROJECT EXPERIENCE



**City of Banning** – Designed logo and branded outreach materials for the “Inspire Banning” city beautification campaign; created new logo for revamp of city transit system; designed outreach materials for several ballot measures that included presentations, ads, flyers and lobby posters.



**Coachella Water Authority & Sanitary District** – Led visual rebranding effort for newly combined agencies, including new logo, collateral and stylesheet, calendars that doubled as a consumer confidence report, and annual report concepts and design; also provided Spanish translation.



**College of the Desert** – Advanced the 2018 and 2019 annual reports, creating a themed design thread to pull the audience through the piece. Crafted a marketing campaign look behind “Create Tomorrow” to bridge the reflective Annual Report with the forward focused State of the College event collateral and invites, harmonizing a look that allows the audience to look to the past while envisioning the future.



**Elsinore Valley Municipal Water District** – Creates graphics and overall look for numerous ongoing projects, including redesign of the district’s Integrated Resources Plan, supporting collateral and graphics, conservation website graphics, quarterly newsletters and bill inserts. Provides Spanish translation as needed.



**City of Rancho Cucamonga** – Designed a 106-page strategic communications plan for the City that included a detailed brand style guide directing use of approved colors, typography, logos and imagery. The guide helped employees deliver a consistent message to stakeholders and the work led to an updating of the City’s logo design and colors.



**Website Design** – Designs web pages in close collaboration with project teams, creates infographics and iconography, provides photo editing services, and assists with layouts and assets for websites, such as [wcd.org](http://wcd.org), [UnitedWater.org](http://UnitedWater.org), and [northcountytransportationcoalition.org](http://northcountytransportationcoalition.org)

# HEATHER ANDERSON

## GRAPHIC DESIGNER

EDUCATION

### Northeastern Illinois University

Chicago, Illinois

Bachelor of Arts // *Graphic Design*

### Ball State University

Muncie, Indiana

Bachelor of Science // *Fashion Merchandising/Marketing*

TECHNOLOGY

Adobe Creative Suite //

*Illustrator  
InDesign  
Photoshop*

Website Design //

*HTML/CCS*

MailChimp

Microsoft Office //

*Excel  
PowerPoint  
Word*

With a decade of experience and a wealth of print, digital and social media skills, Heather is a vital member of the CV Strategies team. This Chicago native took her talents abroad, returning to the States after several years of living and learning in the United Kingdom. Heather's experience, which includes an extensive background in fashion and household consumer product development, along with her multidisciplinary approach and abilities, makes her a unique and valuable addition to the CV Strat crew.

She upholds each client's vision by generating creative ideas and refining design elements until an exceptional product is achieved. Having worked with a variety of brand types in both B2B and B2C verticals, Heather understands how to visually communicate each message tastefully and effectively with specific attention to the client's needs and brand identity.

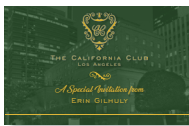
## PROJECT EXPERIENCE



**City of Indio** – Created branded ads for numerous City campaigns and events, including Second Saturdays, Farmers Market and Day of the Dead, as well as City Hall directional and door signs, pop up canopies and Coming Soon banners for downtown.



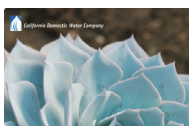
**Civil Rights Institute of Inland Southern California** – Designed all outreach materials for the grand opening event, including the save-the-date, invitation, social media frames, flyers, digital ads, billboards, rack cards, board cards and eblasts. Successful outreach drew more than 1,000 people to the celebration.



**California Club** – Updated communications for this historic and exclusive social club in downtown Los Angeles. The challenge included modernizing the look of all materials for members and prospective members while maintaining a sense of sophistication and tradition. Branded materials ranged from a membership guide and wedding events brochure to social media frames and a coffee table book about the club.



**College of the Desert** – Advanced the 2020 annual report, creating a themed design thread to pull the audience through the piece. Crafted a marketing campaign look behind “Create Tomorrow” to bridge the reflective Annual Report with the forward focused State of the College event collateral and invites, harmonizing a look that allows the audience to look to the past while envisioning the future. Designed a number flyers, banners, catalogs, signage, maps, reports, billboards and other collateral based on institutional brand guidelines.



**Cal Domestic Water Company** – Created the layout, curated photography and designed the company's 2021 Annual Report, as well as an in-depth salary survey report presented to the Board of Directors. Other work for this client includes design of shareholder outreach materials and the strategic plan.



# Scope of Services



# TASK 1 // STRATEGIC ASSESSMENT

## GATHERING INPUT AND EVALUATING CURRENT DOCUMENTS TO ESTABLISH A FRAMEWORK FOR THE STRATEGIC PLAN

CV Strategies will initiate the process by reviewing and analyzing District policies, plans and strategies to identify current and emerging issues. We prioritize a comprehensive understanding of these elements as a necessary component of developing workshop topics and stimulating engaging dialogue.

This information will provide the core details essential to crafting a purposeful strategic plan with realistically achievable goals. Ultimately, we will identify opportunities to help MSWD fulfill its mission to provide, protect, and preserve our most valuable resource... water.

### Deliverables:

- » Kickoff meeting
- » Project timeline
- » Materials audit
- » Site visit
- » Stakeholder list
- » Meeting attendance

### Goals:

- » Evaluate foundational elements of MSWD's mission, vision and guiding principles
- » Ascertain strategic issues to address
- » Pinpoint short- and long-term goals
- » Set priorities
- » Lay groundwork for strategic plan development

SUBTASK	APPROACH
Kickoff Meeting	CV Strategies will meet with District leadership to determine expectations, collect materials, set a timeline, analyze recent strategies and identify stakeholders and workshop participants.
Site Visit	Tour MSWD facilities to gain an understanding of properties and services offered as well as future plans.
Materials Audit	Review and analyze the mission and vision statements, projects, initiatives, policies, reports, etc.
Meeting Attendance	CV Strategies will attend at least one regularly scheduled meeting of the MSWD Board of Directors.



# TASK 2 // STRATEGIC PLAN WORKSHOPS AND INTERVIEWS

## PLANNING AND EXECUTING WORKSHOPS AND INTERVIEWS TO IDENTIFY CRITICAL ISSUES, PRIORITIES AND FUTURE GOALS

CV Strategies will meet with key staff to analyze information obtained in Task 1. This session will provide feedback on the findings to determine specific goals and initiatives and how they fit into the overall objectives of the District.

The feedback will be used to develop topics and questions for three strategic planning workshops for Directors, administrative staff and select employees. These interactive sessions will identify the challenges facing the District and draw out the best ideas to overcome them. The workshops will promote a comprehensive assessment of current initiatives that are working well and look at ways to continue and improve that success.

The workshops will focus on the mission and vision statements, strategic goals, core values, priorities, objectives, action steps and annual performance indicators. The information gathered will create the initial framework for a strategic plan that will provide direction to guide the District on a path toward future success.

### Goals:

- » Identify strengths and potential areas of improvement
- » Inspire creative and critical thinking among process participants
- » Identify common themes across all stakeholder groups
- » Establish District goals and needs
- » Establish agreement around intended outcomes/results

### Deliverables:

- » Brainstorming session
- » Stakeholder interviews
- » Strategic planning workshops
- » Public Engagement
- » Workshop framework
- » Workshops planning
- » Summary of findings
- » Online Survey

SUBTASK	APPROACH
Brainstorming Session	CV Strategies will meet with executive staff and Board members to articulate the findings identified through the strategic assessment and policy audit in Task 1. The session will be designed to generate in-depth discussion of strategic goals.
Workshop/ Interview Framework	Based on District input and materials review, develop questions and topics for discussion at staff workshops and one-on-one or small group interview sessions with stakeholders.
Stakeholder Interviews	Conduct interviews with and gather information from key stakeholder groups to be identified by the General Manager.
Workshop Planning and Facilitation	CV Strategies will organize workshops and develop the agenda and activities to provide an interactive strategic framework for participants.
Strategic Planning Workshops	Conduct workshops for Directors and administrative and cemetery staff to generate discussion regarding goals and strategies based on a presentation of foundational aspects of strategic planning and discussion of critical projects, actions and initiatives by CV Strategies.
Key Findings	Synthesize information gathered in stakeholder interviews and MSWD workshops to develop key points and set priorities and objectives for the draft plan.
Public Engagement	Conduct an online survey and host a listening session inviting the public to provide input on District services and prioritize goals.

# TASK 3 // STRATEGIC PLAN DEVELOPMENT

## ENGINEERING A TARGETED, COMPREHENSIVE PLAN TO GUIDE MSWD'S FUTURE OPERATIONS

CV Strategies will analyze the results of the strategic planning workshops, taking into account the concerns and suggestions of all stakeholders. With our staff's decade-long experience in assisting public agencies in this arena, we will utilize our expertise to develop an effective strategic plan that will guide operations at the district over the next five years.

We will consult with MSWD leaders on the results of the workshops and incorporate all of these components into a draft version of the Strategic Plan for review and input. Our team will provide regular updates to management and staff on the progress of the draft and will be available for consultation by phone or in person as needed.

### Deliverables:

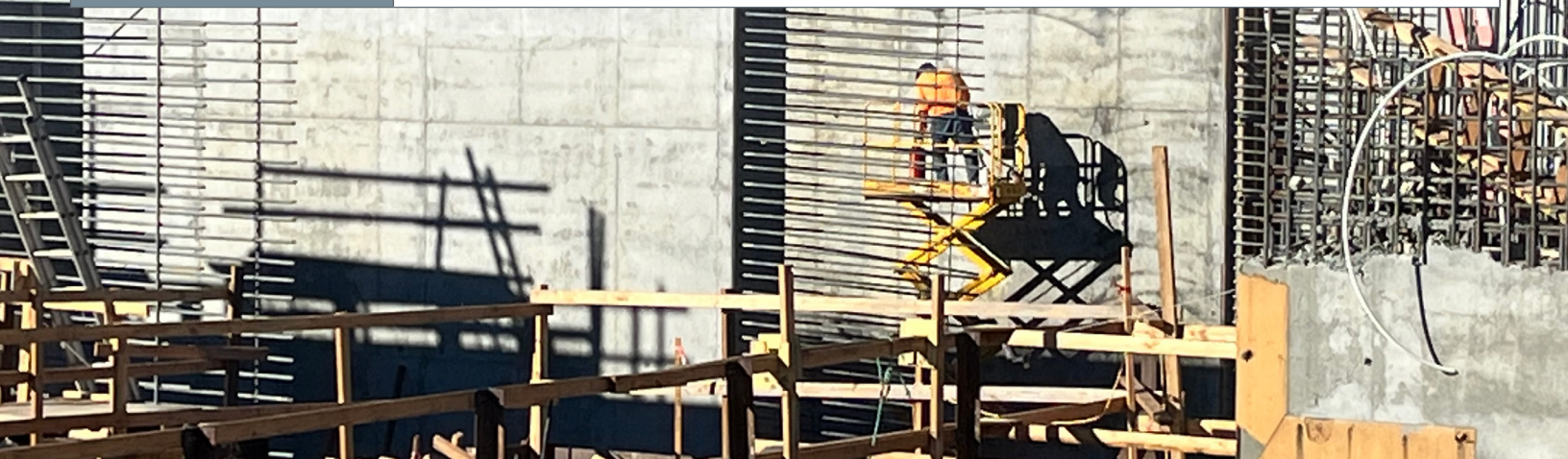
- » Update meeting
- » Draft Strategic Plan
- » Implementation Plan
- » Board presentation



### Goals:

- » Identify action steps for implementing core strategies
- » Define strategic goals for the District's programs and services
- » Verify goals with District leadership and ensure they align with MSWD's overarching mission and vision
- » Develop a plan that articulates objectives, strategies and related execution methods
- » Provide tactical recommendations
- » Establish a timeframe and success metric

SUBTASK	APPROACH
Update Meeting	Meet with the General Manager to review findings from interviews and workshops and discuss the preliminary direction of strategic plan.
Draft Plan	Write and design a strategic plan based on stakeholder feedback and best practices. The document will include the District's goals as defined through the planning process, as well as objectives and strategies to reach those goals. The plan will be provided to leadership for feasibility review.
Implementation Plan	The blueprint for plan execution will focus on tactics to reach specified goals and coordinate planning efforts throughout the agency.
Board Presentation	The draft strategic plan will be presented to the Board of Directors for review and discussion.



# TASK 4 // FINAL STRATEGIC PLAN

## SYNTHESIZE EDITS AND FEEDBACK TO CREATE A FINAL PLAN THAT SERVES AS A BLUEPRINT FOR DISTRICT OPERATIONS OVER THE NEXT FIVE YEARS

In conjunction with MSWD leaders, the draft plan will be reviewed and updated as necessary to create the final strategic plan. An execution timeline will be included as part of the final plan to identify priorities, provide action steps and include key performance indicators to measure success.

CV Strategies will make an in-person presentation of the final plan to the Board of Directors.

### Deliverables:

- » Final Strategic Plan document
- » Board presentation
- » Implementation timeline

### Goals:

- » Provide clear direction for the District
- » Ensure that staff is working toward common goals
- » Identify methods to monitor and track success
- » Establish a smart, forward-thinking road map for the District

SUBTASK	APPROACH
Final Plan	CV Strategies will incorporate any additional feedback from the District and deliver a final strategic plan that thoroughly describes strategic goals, core values, priorities, objectives, action steps, and Key Performance Indicators.
Implementation Timeline	A step-by-step timeline will be developed to guide the District through implementation of the strategic plan. The schedule will outline an approach to monitoring, managing and anticipating issues that may require action.
Key Performance Indicators	Identify benchmarks and milestones based on the strategies crafted in the plan and resources available to achieve initiatives. These points will distinguish priorities and low-hanging fruit that can be affected immediately.
Board Presentation	CV Strategies will deliver the final plan in person at a meeting of the MSWD Board of Directors, complete with visuals and response to questions on the planning process.



# PROJECT SCHEDULE

SUBTASK	MONTH 1				MONTH 2				MONTH 3				MONTH 4				MONTH 5			
	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4

## TASK 1 // STRATEGIC ASSESSMENT

Kickoff Meeting	█																			
Site Visit	█	█																		
Materials Audit		█	█																	
Meeting Attendance				█	█															

## TASK 2 // STRATEGIC PLAN WORKSHOPS AND INTERVIEWS

Brainstorming Session					█	█														
Workshop/Interview Framework					█	█														
Stakeholder Interviews							█	█												
Workshop Planning and Facilitation							█	█												
Strategic Planning Workshops							█	█												
Public Listening Session							█	█												
Key Findings								█												

## TASK 3 // STRATEGIC PLAN DEVELOPMENT

Update Meeting										█										
Draft Plan										█	█	█	█							
Implementation Plan													█	█	█					
Board Presentation																			█	

## TASK 4 // FINAL STRATEGIC PLAN

Final Plan																		█	█	
Implementation Timeline																		█	█	
Key Performance Indicators																			█	█
Board Presentation																				█

# STRATEGIC PLAN SAMPLES

## Jurupa Community Services District



**[Click to view plan](http://www.bit.ly/44oSPGu)**  
[www.bit.ly/44oSPGu](http://www.bit.ly/44oSPGu)

## West County Wastewater



**[Click to view plan](http://www.bit.ly/3Df2kMw)**  
[www.bit.ly/3Df2kMw](http://www.bit.ly/3Df2kMw)

# Appendix





# VALUE-ADDED SERVICES

One of the things that differentiates CV Strategies from our competitors is that we maintain a fully staffed and equipped video department, which enables us to produce TV-quality videos for our clients. We offer a comprehensive range of video services, including concepting, script writing, interviews, field producing, drone shots, animation, voiceovers and editing. Our in-house approach allows us to closely control project quality and costs.



## EQUIPMENT AVAILABLE:

- 1 TB SSD Card
- 24-105 Canon Lens
- Angler Softbox
- Black Large Tripod
- **Black Magic Pocket Cinema 4K Camera**
- Black Sandbags
- **Brinno Portable Camera**
- Brinno Time Lapse Grip
- C-Stand
- Camvate Shoulder Stand
- **DJI Mavic 2 Drone**
- DJI Mavic 2 Controller
- **Feel World F6 Plus Monitor for Canon Camera**
- **Glide Gear Teleprompter**
- GVM Portable Lightpanel
- **Indi-Pro**
- **Ipad**
- Litepanels Astra 6X LED Panel
- Metal Light Stand
- Orange Output Extender
- Outlet Splitter
- Portable Light Stand(s)
- **PowerDewise Lav Mic**
- Rode Wireless GO II
- SD Cards
- Smartphone Vlogging Kit
- Tripod for Brinno Camera

