

Scope of Work # 10: Designing a Strategic Outreach Education Program for Elected Officials

c) Proposal for Addressing Elements of Scope of Work and Required Outcomes:

The EcoLogix Group Team will address the elements of this Scope of Work and provide the required outcomes by: 1) building on the information contained in the management strategy, the work plan summary, and the Chesapeake Watershed Local Leadership Development Programs Report (Leadership Report); 2) working closely with the coordinator and Chair of the Local Leadership Workgroup (LLW) in holding a strategic outcomes discussion with the full LLW; and 3) conducting four focus groups. The strategic outcomes discussion and focus groups will build on the work done to date to provide critical information on:

- *Baseline knowledge and capacity of local officials* – including recommendations on: 1) what information and capacity local officials need in order to become informed, engaged, and effective in the Bay restoration effort; 2) the baseline information and capacity the “average” local official now possesses; and 3) the gap between the information/capacity needed and actually possessed;
- *Existing and proposed local officials’ knowledge building forums both online and in person* – including a list of the forums, entities, etc., that appear best able and positioned to fill the knowledge and capacity gap, and an analysis of whether these programs could/should be tailored (focused, enhanced, or expanded) to better meet the needs of local officials;
- *Peer to peer and other mentoring programs for local officials* – including a list of effective peer to peer, networking, and mentoring programs and opportunities and an analysis of whether they could/should be tailored to increase their use by local officials and their value to them;
- *Key knowledge and content for local officials* – including our recommendation for a delivery mechanism that leverages the best programs, networking opportunities, etc. in a way that will most effectively convey the knowledge and capacity needed by local officials, as discussed in the first bullet above, as well as cost estimates and potential funding sources for creating and sustaining the proposed program;
- *Establish metrics to evaluate the success of programs meant to increase knowledge and capacity of local officials* – including recommendations on potential goals, objectives and milestones for the program structure (delivery mechanism) to ensure it that it can be accurately measured and will support an adaptive management approach.

Our recommendations on these issues will be developed by focusing on information gathering and gap analysis related to local officials’ knowledge levels, skills, and capacity needs, and will include:

- 1) a detailed design of programs and products best able to meet the gap;
- 2) cost estimates for funding these programs;
- 3) a list of potential funding sources;
- 4) a description of potential approaches to sustain program implementation; and
- 5) metrics to evaluate and adaptively manage program success.

Strategic Outputs Discussion

We will, in close coordination with the Local Leadership Workgroup coordinator and Chair (through at least one face to face meeting, emails, and phone calls), organize (handle the scheduling, finalize agendas, propose outcomes, etc.) and conduct (facilitate, take notes, etc.) a strategic outputs discussion with the full Local Leadership Workgroup. We will develop an agenda and proposed outcomes that reflect the work done on the management strategy, the work plan summary, and the Leadership Report. The Key Action sections under each Management Approach will serve as the guide in the strategic outputs discussion and for identifying any necessary revisions to the work plan.

Focus Groups

Based on the results of the strategic outputs discussion, we will organize and facilitate four focus group meetings on topics related to management approaches, summarize the findings on the gap analysis, and recommend a watershed education and training program (delivery mechanism) that includes content, costs, funding, and sustainability considerations. We will provide summary reports after each focus group and then present the findings from all of the focus groups at a Local Leadership Workgroup meeting.

The focus group meetings will be designed to provide recommendations on the questions/key actions consistent with the revised work plan. Each focus group will consist of 12 to 20 individuals, and, as approved by the Chesapeake Bay Program Office (CBPO) project lead, will include local government officials, communications professionals, watershed restoration experts, and leadership program experts. One four-hour meeting with a working lunch will be held in each jurisdiction (VA, PA, DC, and MD) at locations as convenient as possible for the participants and will consist predominantly of representatives from that jurisdiction as well as a few participants from other jurisdictions that are available and willing to travel in an effort to ensure both geographic diversity and subject matter expertise.

Each focus group will provide input and recommendations on baseline knowledge and capacity gaps, successful training programs, delivery mechanisms, costs, funding and success measures. Specific inquiries will include:

- 1) Whether there is agreement with the Leadership Report's recommendations that local officials need both "big picture" information and information on specific success stories, as well as its recommendation to place a higher priority on elected local officials over staff despite the high turnover rate of elected officials;
- 2) How the existing (and planned) training programs and peer to peer networking opportunities could be enhanced or expanded to reach the targeted audience more effectively;
- 3) How the obstacles facing local officials in participating in training programs and networking opportunities can best be minimized;
- 4) Whether there is agreement on the Leadership Report's recommendation that an "umbrella" organization should be considered as an overall delivery mechanism (program) to leverage most effectively the resources of the existing programs, forums, networking opportunities, etc. and meet the challenges facing local officials;
- 5) What the total cost would be of staff and other resources necessary to support the preferred delivery mechanism structure as well as the potential funding sources for creating and sustaining it; and
- 6) What would be the most effective way to measure progress in a way that will lend itself to adaptive management.

Report on Focus Group Findings and Preferred Delivery Mechanism(s)

We will develop a final report that summarizes and highlights the focus groups' findings (including their discussions on the recommendations in the Leadership Report and on other delivery mechanisms). The final report will include our detailed recommendations on the preferred program (delivery mechanism) for watershed education and training that will fill the identified gap in knowledge and capacity for local officials, while leveraging existing programs in an overall structure that will fit the unique needs of the targeted audience. As part of this recommendation, we will identify key players and stakeholders that should be involved (e.g. specific training communities and service providers, state and regional associations, government agencies, etc.). The final report will include budgetary estimates on the cost of creating and financially sustaining the delivery mechanism and the associated programs. Specific

potential funding sources such as foundations, state and federal entities, participant contributions, etc. will also be identified and discussed.

Scope of Work – Services, Timeline and Deliverables

As set forth below, the EcoLogix Group team is uniquely equipped to perform the required services in a timely fashion. Our support for this statement is provided by detailing who will be responsible for conducting the necessary actions and, in the next section of this proposal, describing the extensive background, experience, and expertise our team possesses:

- **Conduct strategic outputs session and draft work plan revisions/workgroup directions (two (2) months from contract start)** – Bob Hoyt and Bob Summers will take the lead in conducting the strategic outputs session within six (6) weeks of contract start and will draft the resulting work plan revisions/workgroup directions within two (2) weeks of the outputs discussion. As part of performing this service, they will work with the Local Leadership Workgroup coordinator and Chair to develop the agenda and otherwise organize the session.
- **Conduct up to four (4) focus groups and report findings to the Workgroup (all focus groups shall be convened within four (4) months of contract start).** – Bob Summers and Bob Hoyt will conduct the focus groups. EcoLogix Group will also provide note takers.
- **Prepare summaries of findings from focus groups (within 21 days of convening each focus group).** – Everyone on the team will contribute to drafting these reports.
- **Draft recommended approaches to implementation of watershed education and training program, including content, detailed design of program, cost estimates and funding sources, and metrics to evaluate success (eight (8) months from contract start).** – Everyone on the team will contribute.
- **Prepare final report (10 months from start).** – Everyone on team will contribute.