



To: John Schatz  
Santa Margarita Water District

From: Adam Probolsky  
Probolsky Research LLC

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Subject: Scope of work for ongoing consulting services

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Below is a compiled list of services we provided for the Santa Margarita Water District on an ongoing basis. We genuinely enjoy our work for the District, on behalf of the ratepayers, and hope to continue serving SMWD in 2012 and beyond.

Current retainer services:

- Provide regular strategic counsel to staff and board members via phone, email and meetings
  - Advise on media relations
  - Advise on inter-governmental relations
  - Threat analysis
  - Opportunity analysis
- Assist SMWD staff and designated consultant(s) in developing community outreach strategy to garner support of SMWD initiatives
  - Among other public agencies
  - Among ratepayers
  - Among the broader Orange County geo-political community
- Coordinate with SMWD staff, board members and other involved parties to present the District's positions as favorably as possible as directed by SMWD
- Work with SMWD staff to develop and maintain a database of key influentials relevant to SMWD for use in an ongoing outreach campaign by SMWD
- Work with SMWD staff to program regular contact with key influential
- Research the positions on public policy matters of other agencies
- Maintain a direct line of communication with various key influentials as directed
  - EXAMPLE: City council members and city managers are often the key decision makers for water departments—they do not regularly attend water related events. We maintain these relationships and have the ability to engage them when necessary. Specifically, North County non-water agency elected officials.
- Conduct a weekly review of regional and Orange County public agency agendas, research relevant items
- Offer unique insights based on our internal polling data regarding water policy in Orange County and California.

## **SCOPE OF WORK**

Curt Pringle & Associates is pleased to continue our strong working relationship with the Board and management staff at SMWD, working collaboratively and in conjunction with Probolsky Research to identify the goals of a community and countywide outreach/communications strategy and subsequently implement a targeted strategy to effectuate these goals over the next twelve months.

This scope of work will include, but not be limited to, the following:

- Work with SMWD staff to develop and maintain a database of key elected and appointed officials and other influential individuals and groups of relevance to SMWD for use in an ongoing outreach campaign
- Develop a white paper, talking points and an action plan to be shared with the Orange County legislative delegation to both enhance your profile and to keep them better informed on your ongoing issues and initiatives
- Program, facilitate and establish a plan whereby these key elected and appointed and influential individuals are regularly contacted; this will include, but not be limited to, breakfast and lunch meetings, e-mail updates, letters and copies of relevant news stories with personalized notes, telephone calls and invitations to SMWD-sponsored and other events
- Outreach, as appropriate and guided by your Board, to other south Orange County water districts that share common goals and challenges to build a coalition
- Monitor the agendas and actions of defined agencies and research the positions on public policy matters of select other agencies, including MWDOC, MWD and the Assembly and State Senate
- Strategic Guidance Policy Meeting with the SMWD Board and its existing legislative consultant(s) on a quarterly basis to develop strategies to best achieve legislative & policy goals
- MWDOC – Continue to provide outreach assistance, where necessary, regarding and future negotiations and discussions between SMWD and MWDOC
- Local government outreach – Provide assistance where desired and appropriate with outreach to local municipalities and special districts on items of relevance to SMWD, including LAFCO-related items
- Provide counsel on an as-needed basis regarding SMWD's major initiatives, including the Cadiz project