



Proposed Scope of Work for the North Santa Clara Resource Conservation District: SWOT Analysis Preparation

Project Overview

The North Santa Clara Resource Conservation District (NSCRCD) is seeking support to conduct a comprehensive Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis as a foundation for their upcoming strategic planning process. This analysis will capture insights from all current Directors, who are familiar with the agency, including those whose terms end in November 2024. The process will continue through March 2025, allowing both outgoing and incoming Directors to contribute to the SWOT analysis and strategic planning foundation.

My Approach

With over 20 years of experience in environmental and organizational leadership, I am deeply committed to the vital work of Resource Conservation Districts. The North Santa Clara Resource Conservation District plays a crucial role in promoting the conservation of natural resources in Santa Clara County, and I am honored to support this important mission.

As a consultant I bring practical experience to every engagement with a unique blend of strategic insight and hands-on expertise. My approach is rooted in the understanding that effective strategic planning is not just about setting goals, but about fostering an environment where people can thrive.

I believe that the strength of an organization lies in its people and their relationships. My process is designed to:

- Create spaces of productive tension that maximize growth and innovation
- Build deeper relationships that lead to powerful community impact
- Create clear and measurable plans that have the detail required to align teams and set the course for the future

Project Goals

- To provide a comprehensive discovery process that gathers insights from existing materials, current NSCRCD Directors, Associate Directors, staff, and incoming leadership
- To facilitate a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis process that captures the experience and knowledge of current and incoming NSCRCD internal stakeholders as well as external stakeholders.
- To document a thorough SWOT analysis that:
 - Provides a clear picture of NSCRCD's current position and future potential
 - Will inform the subsequent strategic planning process with the new Directors
 - Is simple and focused for easier public understanding
- To provide facilitation support throughout the SWOT analysis process, ensuring productive and inclusive discussions.
- To offer coaching and guidance on next steps following the completion of the SWOT analysis, supporting a smooth transition into the strategic planning phase.

Detailed Scope of Work

The scope of work is based on the above listed goals between October 2024 and November 2025. The intent is to provide clarity for both Megan Fluke Consulting and NSCRCD about expectations and deliverables. If NSCRCD should require additional support beyond the articulated scope, I will be amenable to adjusting the work streams and deliverables in service to the project.

Phase	Consultant Deliverable	NSCRCD support needed	Complete Date	Approx time
Process Preparation and Document Review	Review of existing strategic plans, work plans, and relevant documents Development of tailored SWOT analysis framework Preparation of internal stakeholder interview questions and process Preparation of external stakeholder survey questions. Weigh in on survey dissemination process	Staff send existing strategic plans, work plans, and relevant documents to consultant Staff provide perspective on the SWOT analysis framework to consultant Staff and Directors provide perspective on internal stakeholder interview questions and external stakeholder survey questions to consultant	Oct 2024	10 hours

		<p>Staff provide contact information for internal stakeholders to consultant and support scheduling of internal stakeholder interviews</p> <p>Staff and Directors develop a list of desired external stakeholders to conduct survey with</p> <p>Staff develop process to disseminate external survey to appropriate stakeholders to consultant</p>		
Internal Stakeholder Interviews	Schedule and conduct individual interviews with staff, Directors, Associate Directors (both outgoing and incoming)	Staff, Directors, Associate Directors (both outgoing and incoming) make themselves available for a 30 minute interview	Dec 2024	10 hours
External Stakeholder Survey	<p>Design external stakeholder survey</p> <p>Support dissemination of external stakeholder survey</p>	Staff disseminate external stakeholder survey	Dec 2024	5 hours
Summary of Findings	Create a summary report of internal stakeholder interview findings and external stakeholder survey findings with an associated drafted SWOT analysis	Staff review and provide comment on summary report of internal stakeholder interview findings and external stakeholder survey findings with an associated drafted SWOT analysis	Jan 2025	5 hours
Facilitated Session	<p>Design collaborative session to:</p> <ul style="list-style-type: none"> - Present drafted SWOT analysis and receive input from the Directors, staff, and interested general public - Present recommended strategic planning process and receive input from the Directors, staff, and interested general public 	<p>Staff provide perspective on the session to support an efficient and effective session.</p> <p>Staff post requested preparation communication</p> <p>Staff provide day of support</p>	Feb 2025	15 hours

	<p>Prepare session materials and exercises</p> <p>Draft preparation communication for Directors and staff</p> <p>Day of session facilitation</p>	Directors to actively prepare and participate in session		
Analysis and Reporting	<p>Revise SWOT analysis report and strategic plan recommendations based on feedback received from the session</p> <p>Create a simplified, public-facing version of the SWOT analysis report for easier understanding by the general public"</p> <p>Debrief session with Executive Director Revise SWOT analysis report and strategic planning process</p> <p>Conduct debrief session with Executive Director</p>	<p>Staff provide feedback on the SWOT analysis report before finalization.</p> <p>Provide feedback on the simplified, public-facing version of the SWOT analysis report</p> <p>Staff arrange and deliver presentation of key findings to the incoming Board of Directors</p>	Mar 2025	10 hours

Consulting Fees It is estimated that this project will take about 55 hours. Consultant's rate is \$250 per hour, for an estimated total of \$13,750. Proposed payment schedule:

1. October 31, 2024: \$2,500 (estimated 10 hours for Process Preparation and Document Review)
2. December 31, 2024: \$3,750 (estimated 15 hours for Internal Stakeholder Interviews and External Stakeholder Survey)
3. January 31, 2025: \$1,250 (estimated 5 hours for Summary of Findings)
4. February 28, 2025: \$3,750 (estimated 15 hours for Facilitated Session)
5. March 31, 2025: \$2,500 (estimated 10 hours for Analysis and Reporting)

Any additional hours beyond the estimated 55 will be billed at the end of the project, capped at 70 hours. If fewer hours are used, the final payment will be adjusted accordingly.