

**Proposal to Provide Services  
In Development of a  
Five-Year Strategic Organizational Plan  
for  
Marina Coast Water District**

**Prepared For:**

**Marina Coast Water District**

**Attn: Jean Premutati, Management Services Administrator**

**11 Reservation Road**

**Marina, CA 93933**

**Prepared By:**

**The Ingram Group in collaboration with Tersol & Associates**

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## 1.0

### COVER LETTER

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Jean Premutati, Administrative Services Administrator  
Marina Coast Water District  
11 Reservation Road  
Marina, CA 93933

RE: Development of a 5-Year Strategic Plan for the Marina Coast Water District

Dear Ms. Premutati:

*The Ingram Group* is pleased to submit a response to a Request for Proposal to develop a 5-Year Strategic Plan for the Marina Coast Water District.

Candace Ingram, principal of *The Ingram Group*, will serve as the primary consultant for the plan project, and will work in collaboration with Teresa Tersol-Wiseman, principal of Tersol & Associates, in conducting planning sessions and producing materials and the Specific Plan document for the District. Both principals are experienced in developing Specific Plans within the public and private sectors, have worked with a number of public agencies as well as within the private sector, and have demonstrated skills and abilities in:

- working with diverse populations, interest groups and decision-makers on a variety of complex and often controversial issues and projects;
- providing strategic planning services;
- facilitating meetings to achieve progress, clarity and conclusions;
- preparing informational materials and policy-related documents;
- understanding local issues and concerns; and
- possessing working knowledge about the District, water and resource management in the region, land and resource planning, CEQA and the Regional Desalination Project.

*The Ingram Group* has demonstrated experience in providing services to a number of public agencies including the Marina Coast Water District, the Monterey County Water Resources Agency, the Monterey Regional Water Pollution Control Agency, the Monterey Regional Waste Management District, the Fort Ord Reuse Authority, the Monterey Peninsula Water Management District, the Pajaro Valley Water Management Agency, the Transportation Agency for Monterey County and a variety of other agencies, local jurisdictions and elected and appointed officials on various public outreach and information projects, strategic planning, and public and jurisdictional meeting facilitation.

Thank you for your consideration of this response. We hope for the opportunity to meet with you to further discuss approach and content for the sessions and development of a Specific Plan for the District, and we look forward to working with the MCWD Board and staff if selected.

Sincerely,

*Candace Ingram*

Candace Ingram, Principal  
*The Ingram Group*

## 2.0

### WORK PLAN

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#### 2.1 PROJECT OBJECTIVE AND UNDERSTANDING

**Project Objective:** To identify and strategically focus policy, planning and program implementation in a 5 year time frame related to District and community needs and services.

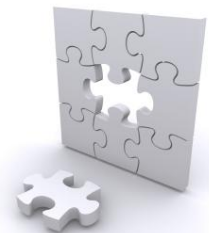
**Discussion:** A Strategic Plan (SP) encompasses both a baseline assessment of an organization and a “road map” to develop and achieve a planned response to factors which affect an organization’s mission. It identifies the purpose of an organization (mission and vision), what it will do and how it will perform (goals and measureable objectives) and under what terms it will operate (values). It specifies baseline capabilities, real or potential constraints that may exist or be placed on an organization, and delivers a set of goals and requirements to achieve identified objectives and desired outcomes. A SP allows an organization to establish direction and priorities, to focus on the critical actions necessary to implement and achieve the mission, improves resource utilization, reduces redundancy, and allows an organization to both establish stability and seek opportunity. A SP receives final review and approval by organizational management and policy makers (the District Board of Directors) and is developed through a process to assure that objectives can be implemented and achieved with directed action.

#### **Project Understanding:**

Marina Coast Water District (MCWD) provides water, wastewater and recycled water services for approximately 8,000 customers in the City of Marina (“Central Marina”) and Ord Community (former Fort Ord). MCWD is also leading the planning and permitting process for the Regional Desalination Project (Project) which is a public-private partnership between the Marina Coast Water District (MCWD), Monterey County Water Resources Agency (MCWRA) and California American Water Company (CAW). The Project includes source wells for production of brackish water, a desalination facility, conveyance infrastructure to deliver product water to the CAW system, and an aquifer storage and recovery system for storage of water in the Seaside Groundwater Basin.

The MCWRA will own, construct, operate and maintain source wells and source water conveyance facilities to the Desalination Plant. The MCWD will own, construct, operate and maintain the Desalination Plant and water conveyance facilities to the point of delivery to the CAW facilities (the Desalination Plant). CAW will own, construct, operate and maintain the pipeline, conveyance and pumping facilities necessary to deliver water to CAW’s Monterey system. The Project was approved by the California Public Utilities Commission (CPUC) in December 2010. Upon completion of the Project, it is expected that CAW will purchase approximately two-thirds (2/3) of its water supply from the Desalination Plant. Desalinated water from the Project will also be supplied to MCWD for service to meet approved redevelopment water needs in reuse of the former Fort Ord.

MCWD seeks assistance in development of a strategic organization plan which incorporates five-year goals and measureable objectives. The scope of services requested by MCWD include development of Values, Vision and Mission, creation of Goals and measureable Objectives, identification of tasks/activities and



resources to be applied or needed, assignments of responsibility, schedule/activity timeframes, production of a Strategic Plan document and identification of recommended implementing policy documents to guide the District in achievement of goals, objectives and activities.

## **2.2 SUCCESS FACTORS**

*The Ingram Group* team will specifically provide services which lead to production of a 5-Year Strategic Plan for the District. Consultants will facilitate focused discussion sessions with District Board and Management staff in identification of values, vision and mission statements, goals and objectives, activities, resources, assigned responsibilities, policy development as applicable, and a schedule and timelines for measureable progress and accomplishment. Consultants will produce an administrative draft Strategic Plan document for initial review by management, and a Final Strategic Plan document for review and consideration by the District Board of Directors. Consultants will additionally provide a public presentation of the proposed Final document prior to action by the District Board.

**Success Factors** shall be those which result in identified and agreed upon direction and activities pertinent to achieving adoption of a 5-Year Strategic Plan for the District.

## **2.3 PROPOSED METHODOLOGY/APPROACH**

**Participants** It is suggested that to the extent feasible, sessions include both Board members and primary management staff/ department heads with responsibility for implementing policy direction and action plans to refine and accomplish objectives, and who can also serve as technical resources and contributors in session discussion. Inclusion encourages stronger team work and “ownership” in District plans, policies, activities and goals. The Board ultimately retains authority for review and approval of District direction, policy, and results.

**Session Agendas and Materials** Consultant will prepare draft agendas and work with the General Manager/staff to identify, provide and distribute materials needed prior to and during the sessions.

**Length of Sessions** Sessions are proposed to be approximately 3 hours in length, but may vary dependent upon the desires of District Board and staff members as content is determined.

**Process/Approach** *The Ingram Group* proposes a 10-step/task process to achieve production of a final Strategic Plan for the Marina Coast Water District.

### **Step 1 Pre-Session Meeting with General Manager and Management Staff**

Consultant(s) will meet with the General Manager to review contract, scope of services, and identify information needed and discuss/refine goals and format for the sessions. Consultant will also attend a staff meeting of management staff/ department heads ahead of the initial scheduled discussion session to provide clarity about the process, to gather input on items and resources to be considered in the process, to identify information needed for sessions, and to review the intent and process for the Plan and sessions.

### **Step 2 Pre-Session Interviews with Board and Management Staff**

Consultant(s) will conduct in-person and/or telephone interviews with Board members, the General Manager, and identified Management staff members to gather information about desired projects, elements and policies to be considered in developing the Strategic Plan.

### **Step 3: Preparation of Participant Notebooks and Materials**

A notebook will be prepared and provided to the Board and Management staff. Notebooks will contain written information about Strategic Planning, the process that will be used, purpose and expected outcomes, and survey documents to be completed by participants. Survey documents are requested be completed by participants and provided to consultants in advance of scheduled sessions for purposes of organizing and focusing session content.

*To implement the Values Identification, Vision and Mission statements segment in Steps 4 – 6 below, participants will be asked to complete short survey documents found in the notebooks prior to the first group meeting. Survey documents will inquire about items that participants consider of critical importance relative to the purpose of the organization, how it conducts its business, programmatic components, and financial and personnel resources to be considered in developing the Specific Plan. Responses will be compiled by consultants and not attributed to specific individuals. Compilations will be distributed and used as the basis for discussion to identify and rank value consensus within the group during this segment of the process.*

### **Step 4: Values Identification**

Persons within organizations are typically motivated and make decisions based on belief systems and values. Values represent what the District stands for, what people believe in, and what is most important in motivation, decision-making and achievement. Values identification notes the individual and organizational principles, standards and actions that persons in the organization consider inherently worthwhile and of importance to be represented in developing, guiding and implementing actions of the organization. Identifying and prioritizing values promotes links among diverse points of view by creating a sense of common direction/guidelines for activities and behaviors and encourages personal and organizational responsibility in decision-making.

### **Step 5: Creating a Vision Statement**

Visioning is a form of problem solving and lays the foundation for forward planning and achieving incremental improvements by allowing persons to consider what can be done and how. Building upon values expressed by participants, the group will be asked to submit a worksheet to consultants which pulses for items to be considered in a District vision statement. Based on information received, consultants will compile the information for presentation of a draft vision statement in the Board/management session on this topic.

### **Step 5: Creating a Mission Statement**

Participants will be asked to complete a brief survey document from the notebook designed to elicit comments about the purpose of the District. Comments will be compiled by consultants and a draft Mission Statement provided to participants for consideration during the session on this topic.

### **Step 6: Development of District Goals and Primary Objectives**

Participants will be asked to complete a brief survey to identify primary goals and objectives. Consultants will combine this survey data with information obtained from interviews and sessions and present draft goals and objectives for consideration by the Board and management staff during the session on this topic. Session discussion will also elicit comments about proposed activities, tasks, resources, policies and timeframes to accomplish identified goals and objectives.

### **Step 7: Refinement of Goals, Objectives, Activities and Scheduling**

Consultants will attend 2 additional meetings with management staff to further refine activities based on suggested goals and objectives resulting from the Goals and Objectives Board/Management session on this topic. Recommended goals, objectives and measureable activities with scheduled timeframes will be included in production of the administrative and final drafts of the Strategic Plan and are subject to final approval and adoption by the District Board.

### **Step 8: Draft Policies Related to Implementation of the Strategic Plan**

Consultants will work with District management and legal counsel to identify and further refine suggested and desired/needed policies in achievement of Strategic Plan goals, objectives, and activities. If desired, consultants will assist in preparation of initial draft of policy statements for review by management/ counsel and ultimate approval by the District Board.



Strategic Planning

### **Step 9: Administrative Draft Strategic Plan**

Consultants will prepare an Administrative Draft of the Specific Plan for review by management staff and refine the document as needed prior to presentation of a Draft Plan for consideration by the District Board.

### **Step 10: Production of Final Draft and Final Strategic Plan for Review and Consideration by District Board**

Consultant will produce a Final Draft Strategic Plan for review and approval or modification by the District Board of Directors within four months of start of the project dependent upon availability of Board and staff. Consultant will present and discuss the plan at a public hearing of the Board. Following this consideration and upon approval of an adopted Final Plan, Consultant will provide an electronic copy and 6 hard copies of the Final Plan to the District.

**2.3.1 Deliverables/Outcomes:** Meetings with Management and Board; statements of consensus-based organizational Value(s)/ principles, Vision and Mission to help guide development of the Strategic Plan and organizational activity and decision-making when implementing the Strategic Plan; identification of Goals, Objectives, Activities/Tasks, Resources needed, Schedule and Timelines for activity completion; Assignments of Responsibility; draft Policy Statements; Administrative Draft of the Strategic Plan; Draft Final of the Strategic Plan; and an electronic and 6 hard copies of the Final Strategic Plan.

### **2.4 CONSULTANT AND DISTRICT RESPONSIBILITIES: Materials, Meetings, Notices**

Consultant will provide a notebook and survey worksheets for use in scheduled sessions with Board members and Management staff, bring materials to be used by Consultants in conducting sessions with Board and staff, provide an electronic copy of the proposed Administrative Draft Strategic Plan, provide an electronic copy of the proposed Draft Strategic Plan, and provide an electronic copy and 6 hard copies of the approved Final Strategic Plan adopted by the District Board.

The District is requested to work with consultants by scheduling dates, times and locations for informal and formal meetings; preparing and distributing legally required noticing of meetings with the Board; assisting in identifying and providing various informational materials for sessions as mutually determined; and providing copies of Strategic Plan materials for scheduled sessions and copies of products for consideration in meetings of the Board and/or management.

### 3.0

## PROJECT TEAM QUALIFICATIONS AND EXPERIENCE

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### 3.1 FIRM DESCRIPTION AND TEAM ROLES

*The Ingram Group* is a sole proprietorship. The firm utilizes a business model format that utilizes professional and skilled independent consultants to achieve a team composition that is most responsive to the needs of individual projects rather than maintaining a full complement of regular staff.



Candace Ingram will serve as the lead consultant, project manager and primary facilitator for the sessions.

Teresa Tersol-Wiseman will assist with project coordination and preparation of materials for and resulting from meetings. Both Ms. Ingram and Ms. Tersol are experienced in work with public agencies and elected officials, as well as having demonstrated strategic and private sector experience. Ms. Tersol also brings additional legal skills to the team's composition.

Should the District desire expanded expertise in land planning, financing, engineering, public works construction, or other project-related expertise, *The Ingram Group* can also provide additional technical resource consultant assistance based on costs for time and materials

### 3.2 PRIMARY TEAM RESUMES / SAMPLE PROJECTS

Please refer to Attachment A the end of this Response document for copies of resumes for the primary consultants Candace Ingram and Teresa Tersol-Wiseman.

### 3.3 BILLING RATES

Billing rates for primary consultants:

Candace Ingram	Primary Consultant/Session Facilitator	\$ 125 per hour
Teresa Tersol-Wiseman	Project Assistant/Recording/Policy	\$ 125 per hour

Out-of-pocket expenses will be billed and reimbursed on an actual cost basis.

### 3.4 REFERENCES

References for *The Ingram Group*/Candace Ingram are noted on the following page. In addition to the references listed, you are more than welcome to contact anyone whom you believe may have knowledge about the ability of *The Ingram Group* / Candace Ingram.



Michael A. Houlemard, Jr.  
Executive Officer  
Fort Ord Reuse Authority  
100 12<sup>th</sup> Street, Building 2880  
Marina, CA 93933  
(831) 883-3672

William Merry  
General Manager  
Monterey Regional Waste Management District  
P.O. Box 1670  
Marina, CA 93933  
(831) 384-5313

Debra L. Hale  
Executive Director  
Transportation Agency for Monterey County  
55 – B Plaza Circle  
Salinas, CA 93901  
(831) 775-0903

### **3.5 CONFLICT OF INTEREST STATEMENT**

The primary consultant team members have no known conflicts with respect to work with the Marina Coast Water District. In the past, Candace Ingram has provided independent contractor services in public outreach, information, strategic planning, team building and meeting facilitation for a number of local agencies and jurisdictions including the Marina Coast Water District and the Monterey County Water Resources Agency. She is married to a city attorney for cities within the CAW boundaries.

4.0

**BUDGET AND IMPLEMENTATION SCHEDULE**

Activity	Month 1	Month 2	Month 3	Month 4	Est. Hours	Est. Cost
2.3.1, 2 & 3	Pre-Session Meetings, interviews, materials, summaries				36	\$ 4,500.00
2.3.4 & 5		Values, Vision, Mission Statements Session 1			23	\$ 2,875.00
2.3.6, 7 & 8			Goals & Objectives - Draft Policies		40	\$ 5,000.00
2.3.9				Administrative Draft	12	\$ 1,500.00
2.3.10				Draft Strategic Plan, Presentation, Final Strategic Plan	10	\$ 1,250.00
Contingency					8	\$ 1,000.00
					<b>Total Estimated Labor Costs</b>	129 \$16,125.00
					<b>Additional Misc. Costs: Materials, printing</b>	400
						<b>\$16,525.00</b>

<b>Project Tasks</b>	<b>Est. Hours</b>	<b>Estimated Costs</b>
<b>Pre-Session Meetings, Interviews, Materials, Summaries</b>	36	\$ 4,500.00
Step 1 Pre-Session Meeting with General Manager and Management Staff		
Step 2 Pre-Session Interviews with Board and Management Staff		
Step 3: Preparation of Participant Notebooks and Materials	23	\$ 2,875.00
<b>Values, Vision, Mission Statements</b>		
Step 4: Values Identification		
Step 5: Creating a Vision Statement		
Step 5: Creating a Mission Statement		
<b>Goals &amp; Objectives</b>	40	\$ 5,000.00
Step 6: Development of District Goals and Primary Objectives		
Step 7: Refinement of Goals, Objectives, Activities and Scheduling		
<b>Administrative Draft</b>	12	\$ 1,500.00
Step 8: Draft Policies Related to Implementation of the Strategic Plan		
<b>Draft Strategic Plan, Presentation, Final Strategic Plan</b>	10	\$ 1,250.00
Step 9: Administrative Draft Strategic Plan		
Step 10: Production of Final Draft and Final Strategic Plan for Review and Consideration by District Board		
Contingency	8	\$ 1,000.00
	<b>129</b>	<b>\$ 16,125.00</b>
	<b>Estimated Misc. Costs (materials, printing, etc.)</b>	<b>\$ 400.00</b>
	<b>Estimated TOTAL COSTS</b>	<b>\$ 16,525.00</b>

**ATTACHMENT A**  
**RESUMES FOR PRIMARY CONSULTANTS**

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**CANDACE INGRAM**

P.O. Box 51661 Pacific Grove, CA 93950

Phone: (831) 373-3609 Fax: (831) 373-0108 Email: [ingramgp@ix.netcom.com](mailto:ingramgp@ix.netcom.com)

**PROFESSIONAL EXPERIENCE**

*Principal  
The Ingram Group  
Pacific Grove, CA*

Principal/consultant for private consulting firm providing services related to land use, community and governmental relations; public relations and marketing; political campaign management; strategic planning; administrative and management consultation; process facilitation and management skills training; organizational development; meetings and conferences facilitation and management. The Ingram Group is a woman-owned small business.

*Executive Director  
Community Human Services Project  
Monterey, CA*

Administrator of Joint Powers Agency. Fiscal and contracts management; personnel management, supervision and development; program development and implementation; data collection and analysis; grants and reports; community organization and liaison; fund raising; marketing; training.

*Executive Director  
The Center  
Pleasanton, CA*

Administrator of non-profit corporation. Responsible for establishment of agency. Duties similar to those described above.

*Director, Information and Education  
Planned Parenthood of Western Missouri and Kansas  
Kansas City, MO*

Administrator of program and volunteer services. Program development; administration and management; grants management; fiscal systems compliance; fund raising; personnel supervision, training and evaluation; data collection and analysis; community liaison; media and public relations.

*Program Director  
YWCA  
Ogden, UT*

Administrator of program and volunteer services. Development and supervision of programs/services; fund raising; contracts management; volunteer recruitment, supervision, training, public relations; and publicity.

**COMMUNITY INVOLVEMENT**

Member, Board of Directors, Monterey Credit Union Prior member and chair, Supervisory (audit) Committee, Monterey Credit Union

Former Public Member and Chair, Monterey County Local Area Formation Commission

Member, past-President and Vice-President, Soroptimist International of the Monterey Peninsula  
Former Member and Board President, Board of Education, Pacific Grove Unified  
Former Member/past-President, Session Presenter, Board of Directors, Leadership Monterey Peninsula  
Former Member and past-President, Board of Directors, Elkhorn Slough Foundation  
Former Commissioner and Vice-Chair, Monterey County Community Services Commission  
Former Public Representative, Monterey County Administrative Review Board  
Member, Monterey Peninsula League of Women Voters; past member Board of Directors and Voter Services Director  
Former Nominating Committee, Tri-County Area Girl Scouts

## **EDUCATION**

Master Degree: Public Administration (MPA)

Bachelor of Arts Degree: Spanish/English

## **The Ingram Group Sample Projects Summary**

### **Regional Area**

***Fort Ord Reuse Authority:*** Reuse Plan/EIR development and implementation process - public and agency outreach, information, meeting facilitation. Current public information officer/consultant for the agency. Publications and materials, facilitation of numerous community and agency meetings, media information and liaison, and special events management.

***Monterey Regional Water Pollution Control Agency:*** Preparation of Public Relations Plan. Facilitation of regulatory meetings for agency project. Assistance in preparation of agency annual report.

***National Oceanic & Atmospheric Administration (NOAA):*** Development, implementation and facilitation of Partnership Program for National Marine Sanctuary. Community/business/agency information, materials and workshops.

***Central Coast Veterans State Cemetery Foundation:*** Consulting administrator for establishment of cemetery and ancillary services and facilities. Development and implementation of information and fund raising programs, coordination of volunteers, and organizational management.

***Associated Monterey Bay Area Governments (AMBAG):*** Board workshop facilitation.

***Elkhorn Slough Foundation:*** Strategic Plan development and facilitation. Board member.

### **Monterey County Area**

***Transportation Agency for Monterey County (TAMC):*** Public outreach and information program for select road improvement projects including Hwy 68-Ragsdale, Hwy 68-Community Hospital, and Carmel Hill-Hatton Canyon Bike Trail projects. Meeting facilitation. Community, business, agency and media relations and informational materials, events.

***Monterey Regional Waste Management District:*** Development and facilitation of Strategic Planning process for Board and staff, and facilitation of management and task group meetings.

***Monterey County Agricultural Commissioner's Office/California Department of Food & Agriculture:*** Facilitation of community information meetings related to aerial application project.

***Monterey Peninsula Water Management District:*** Public outreach/information for development of waster projects and EIR process. Publications, public and agency meeting facilitation, media liaison/management.

**Marina Coast Water District:** Advisory to GM in augmentation project EIR outreach process. Strategic Planning program facilitator. Staff training in public outreach and communications. Facilitation of Board workshops and strategic planning sessions.

**Monterey County Redevelopment Agency:** Community and government relations for Castroville Revitalization Project. Public and agency information and outreach. Meeting facilitation. Media management. Reports preparation.

**Monterey County Water Resources Agency:** Public, business and agency outreach for fee assessment project related to Basin Management Plan/EIR process. Strategic Planning workshops (design and facilitation) for Board and staff.

**YWCA:** Recruited as consulting administrator for agency for 4 months during search for permanent executive director. Administration of agency, programs and personnel, budgeting and finance, grants preparation and management, and coordination of Board and volunteer services.

**Pebble Beach Company - Real Estate Division:** Community Relations consultant for Spanish Bay project EIR and approval process, and other future planning and development projects. Preparation of informational materials. Community and agency liaison. Community/agency meeting facilitation. Media management.

### **Santa Cruz County Area**

**Pajaro Valley Water Management Agency:** Development and implementation of public information and outreach program for Basin Management Plan/EIR. Community, agency and stakeholder meeting facilitation and contact. Public outreach & management advisor to GM and Board. Media management. Public outreach and information for 218 process.

**Department of Public Works and Planning:** (Graham Hill Road Safety Improvement Project and Sandhills Habitat Conservation Plan/EIR Process) Public outreach and involvement consultant. Community meeting facilitation. Media information and liaison. Agency presentations.

**Santa Cruz City-County Library System:** (Felton Branch Relocation and Scotts Valley Expansion Projects) Public involvement plan development and implementation. Identification and liaison with stakeholders. Selected interviews, survey & questionnaires, focus groups, materials, media communications.

### **San Benito County Area**

**Gavilan-Fairview Corners:** Project area plan for establishment of college campus in Hollister and adjacent private and employee housing and neighborhood commercial project. Public outreach and information and management/planning process consulting.

### **Other Area Projects**

**City of Sanger (General Plan Update process):** Public outreach and information, Identification and engagement of stakeholders. Community meeting facilitation. Materials and communication methodologies.

**Merced County - Stevinson Community Plan:** Community outreach and information in development of Community Specific Plan/EIR. Meeting facilitation, materials, stakeholder identification and contact.

**Alameda County (EBCRC):** Business, organizations and community involvement and funding outreach strategy and meeting facilitation for regional economic development process.

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T E R E S A T E R S O L - W I S E M A N

Postal Box 3747  
Carmel, California 93921  
(831) 624-6023 (phone) (831) 309-6780 (fax) (831) 706-2400 (VOIP)  
teresa@tersol.com (e-mail)

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P R O F E S S I O N A L E X P E R I E N C E

Tersol & Associates, Business Services

June, 1997 to present

Carmel, California - USA

PARTNER, SENIOR CONSULTANT. *Offering consulting services to companies, non-profit and other organizations via various projects. Some of those clients with whom I have worked include: Invest in Sweden; JCG International Site Selection Consultants; NavTeq (both in the U.S. and Europe); Softbank Services Group (ClientLogic); Platinum Development Company; ASE; Solex; Adaptiv; Consumer Link Networks (Perks.com), eGlobal Villages, Telepost; and TopTier Software among others. Some of the projects have included, but are not limited to:*

- *Developing and presenting workshops for organizations in developing and defining organization vision and mission statements, defining organizational values, strategic alignment to organizational goals*
- *Workshop and Seminar Organizing, co-ordination and facilitation*
- *Mediation and Conflict Resolution – intra and inter departmental, organizational*
- *Designing Ongoing Customer Retention Programs and Infrastructure*
- *Establishing Quality Plans, Defining Key Performance Metrics, Measurement Systems*
- *Strategic planning for a company moving to a customer management model*
- *Supplier and Vendor Audits, establishment of Supplier/Vendor Management Programs*
- *Business Process Re-engineering Projects with goal of ensuring organizational strategic alignment*
- *Assisting in preparing for ISO 9000, TS16949 quality certifications and audits*
- *Assessment of existing customer management, accounting system, implementation of new system*
- *Designing Cost Containment –Continuing Improvement Programs for multi-national organization including systems to measure improvements*
- *Building business cases, financial and operational, for organizational IT investments including establishing benchmark measurements and methodology for measuring and tracking Return on Investments.*

Knowledge Adventure, Inc., Educational Software and Online Publisher  
Torrance, California - USA

2005 - present

GENERAL COUNSEL. *Providing general legal services to a software publisher who specializes in online and retail educational games for children. Drafts and reviews all legal agreements including, but not limited to, international and domestic licensing, general corporate agreements, Terms and Conditions, NDAs, Professional and Personal Services Agreements, etc.*

Softbank Services Group  
Monterey, California

December, 1993 to March, 1997

MANAGING DIRECTOR, VICE PRESIDENT-INTERNATIONAL. *Responsible for managing an International/Pan-European call center and fulfillment center in Dublin, Ireland. As a subsidiary of Softbank Services Group whose headquarters are in the United States, had full responsibility for*

*the European operations. Complete Profit and Loss Accountability. Responsible for growth reflecting at least 100% annual growth for the past three years on a profitable basis. Company grew from 5 employees in 1991 to 200+ in 1997.*

Alexander & Lord (UCA&L) January, 1988 to December, 1993  
Monterey, California  
VICE PRESIDENT, CLIENT SERVICES. (Director, Client Services, Operation Manager) *Managed the Client Services group of fourteen - including Account Managers, Account Coordinators, Client Customer Service Representatives, IS Support Coordinators and Inventory Control Manager - of a call center and fulfillment services company. Responsible for ensuring that the company met client expectations, built relationship with clients, understood client marketing and sales objectives.*

Digital Research, Inc. September, 1985 to December, 1987  
Monterey, California  
ADMINISTRATOR OF COMPENSATION AND STATISTICS. *Managed third party license and royalty tracking and reporting for a software company. Managed licensing and royalty tracking from licensing customers. Also managed tracking and payment of all commissions. Primary responsibility was contract administration of all royalty agreements.*

*November, 1980 to August, 1985*

Law Offices of Teresa Tersol  
Monterey, California  
ATTORNEY AT LAW. *Established and ran private law practice in general law.*

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E D U C A T I O N

Martin Luther King Jr. Hall, School of Law - University of California,  
Davis, California 1975 to 1978  
Juris Doctorate - 1978

Oakes College - University of California, 1972 to 1975  
Santa Cruz, California  
Bachelor of Arts, Sociology - 1975

Monterey Peninsula College 1969 to 1971  
Monterey, California  
Associate of Arts, ethnic studies – 1971

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O T H E R I N F O R M A T I O N

Member, California State Bar 1980 - present  
Chairperson, IQPC –conference, Atlanta, GA October 1997  
COPC Auditor’s Class – Buffalo, New York July 1998  
Speaker – Telemarketing 2000 hosted by Telecom Ireland, Dublin, Ireland Sept. 1996  
Speaker, IQPC –, Dublin, Ireland June 1996  
Mediation Training – Certified Mediation  
Lifetime California Community College teaching credential – law  
Former Member, Filipino Community Organization of the Monterey Peninsula  
Former Member, Monterey County Commission on the Status of Women  
Former Director, SCRAMP