



SDAO  
CONSULTING SERVICES  
PROGRAM

SPECIAL DISTRICTS  
ASSOCIATION OF OREGON

PROVIDING OUR DISTRICTS WITH EXPERT ADVICE AND  
GUIDANCE FOR REDUCING RISK, IMPROVING SERVICES,  
**AND PLANNING FOR THE FUTURE.**



# CONSULTING SERVICES PROGRAM

## ABOUT US

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The SDAO Consulting Services Program was established in 2007 to assist districts with addressing complex issues as they work toward providing their patrons with cost-effective, highly desirable, and efficient public services. With a cadre of expert consultants at its fingertips, the Consulting Services Program can assist districts with board and organizational assessments, management recruitment, strategic planning, board and staff training, meeting and process facilitation, and overall best practices for your district.

## MISSION

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The mission of the program is to provide members with assistance in making sound management and policy decisions that are in alignment with best practices and state law. As a result, districts operate more proficiently, with less conflict and liability exposure, providing more resources for their specific service.

## 8 HOURS OF FREE CONSULTING SERVICES

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Member districts enrolled in the general liability program are eligible for up to eight hours of free consulting services each year provided by a team of experienced consultants. After the eight hours of complimentary service is exhausted, members will have the option of continuing consulting services at a reduced hourly rate. Members that are not in the general liability program can access the program at the reduced hourly rate, however, are not eligible for the free 8 hours of consulting services.

Member districts with SDIS property casualty insurance coverage are eligible for up to eight hours of free services provided by our consultants every year. After this time is exhausted, members will have the option of continuing at an hourly rate



## ■ HONEST AND EXPERT OPINIONS

Our consultants are committed to excellence and are here as a valuable resource to help your district succeed. We have a range of expertise and experience with almost all district types and sizes. Our consultants can assist with problem-solving almost any business challenge your district may have.

## ■ ORGANIZATIONAL SERVICES

Your district's success and response to future challenges are built from the foundation of a well-run organization. Our consultants help organizations optimize their core performance by identifying what works, what needs to be fine-tuned, and planning for future requirements.

## ■ FREE 8 HOURS PER YEAR

Did you know that your district's SDAO membership includes 8 FREE consulting hours each year? Receive helpful advice, address issues, or brainstorm project ideas with one of our experts. Don't miss out on this valuable and impactful benefit for your special district.

LOWER COSTS

OPTIMIZE PROCESSES

IMPROVE EFFICIENCIES

# OUR SERVICES

*Our expert consultants collaborate with members to understand their individual needs in order to provide exceptional, effective, strategic and compliant best practices for their district.*

## DISTRICT MANAGER TRANSITION PLANNING

Every district will experience a change in leadership. Being prepared for that change, be it suddenly or planned, will impact the short and long-term future of the district. We have developed a guide to assist districts with planning for and implementing a process that will ultimately lead to a successful transition from one district manager to another.

## MANAGEMENT RECRUITMENT

The program's management recruitment services are tailored to meet your district's needs at a substantially lower cost than national recruitment services. We do this through working hand-in-hand with district leaders to design and implement an inclusive recruitment process that best fits the needs of the district. The amount of assistance can range from SDAO outlining the recruitment process for the districts to implement to SDAO leading and facilitating the entire process.

## EMPLOYEE HANDBOOK DEVELOPMENT

SDAO Consulting Services provides professional assistance in developing or updating employee handbooks to ensure clarity, consistency, and legal compliance. This service includes a structured and comprehensive approach, guiding organizations through the process while maintaining ownership of their handbook.

## PUBLIC MEETING LAW TRAINING

SDAO Consulting Services offers Oregon Public Meetings Law training! This course is approved by the Oregon Government Ethics Commission (OGEC) and satisfies the training requirement in ORS 192.700. It provides a clear, practical overview of Oregon Public Meetings Law, including when the law applies, public notice requirements, executive session procedures, and proper meeting documentation. The course also covers OGEC enforcement updates and potential penalties, helping public officials stay compliant

## ORGANIZATIONAL ASSESSMENTS

Our team of consultants have the expertise to assist your district with assessing your overall operation. With a look from the outside, our consultants can provide you with guidance and recommendations that will set your district up for long-term success. Consultants assess organizational efficiencies and effectiveness; financial sustainability; personnel management; operating policies and procedures; staff and board training opportunities and involvement; and specific operational activities associated with the type of district being assessed. A written report is provided to the district that summarizes the consultant's findings and recommendations for improvements.

## BOARD PRACTICES ASSESSMENT (BPA)

The Board Practices Assessment (BPA) shows district boards how they rate in six key areas of risk management. The BPA reveals how a board performs in such areas as communications, customer relations, personnel, operations, etc. Results of the BPA underscore the significant link between a board's performance and their district's risk management experience. Simply put, good board practices lead to sound risk management.

## BOARD GOVERNANCE QUESTIONNAIRE

During times of crisis, all eyes look to the special district's board to figure out where things went wrong. Boards that strive to improve their governance practices are less likely to subject themselves to a calamity. A board's effectiveness is determined by its practices of good governance and understanding the principles of good governance is a necessity for board members in order to follow through on their duties and responsibilities. The Board Governance Questionnaire tool was designed to help boards decide whether they would benefit from participating in the BPA. Your district can use the Board Governance Questionnaire electronically and confidentially to determine how your board is faring. Once the questionnaire is completed by each board member, a summary will be sent to the board with a rating. Based on the rating, your board can decide whether to request the BPA.



# WE HAVE A HIGHLY-QUALIFIED TEAM OF EXPERIENCED CONSULTANTS READY TO HELP YOUR SPECIAL DISTRICT.

## BASIC PLANNING



Board Practices Assessments Completed

Consultants are available to assist districts with a wide range of planning projects. This service is focused on facilitating and outlining basic goals, objectives, and actions to assist the district with preparing for a preferred future or address management/operation issues. Implementation details and evaluating performance measures are generally left for the district to complete. Consultants can assist districts with developing strategic, business, capital equipment, training, and succession plans.

## BOARD TRAININGS

Consultants are available to provide trainings for board members that identify key roles, responsibilities, and duties of board members in the areas of CEO/board relations, ethics, finances and budget management, public meeting requirements, and other issues associated with governing a special district.



## CONSULTANT PROCUREMENT SUPPORT

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SDAO Senior Consultants will assist districts in the procurement of other specialty consultants such as engineers, architects, planners, rate economists, accountants, auditors, and other specialists. Depending on the needs of the district, SDAO Senior Consultants can assist in identifying applicable state procurement requirements, prepare requests for proposals, propose evaluation criteria, administer the consultant procurement process, provide outreach to prospective consultants, coordinate the district's consultant selection, and coordinate contracting with the selected consultant. These services can be scaled to meet the unique needs of the district from offering limited guidance and suggestions, to providing full-service consultant procurement support.

## SPECIAL PROJECTS

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Consultants are available to assist districts with special projects or problem solving when an issue has come to the surface. Through facilitation and interviewing, consultants can assist with addressing a variety of issues such as meeting and process facilitation, public outreach, board/manager relations, and reviewing, updating, and implementing policies and procedures.



**12**  
Senior Consultants

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# TESTIMONIALS

## RIVER ROAD PARK & RECREATION DISTRICT

This park and recreation district is based in Eugene. It provides classes, recreation programs, an aquatics center and a fitness center to local community members.

*"As a member of Special Districts for the last four decades, we have employed several areas of service over the years. Recently, our district utilized SDAO's consulting services for management recruitment. The vacancy was for superintendent. The Board and senior staff made the decision to invest in the expertise of SDAO for such a critical hire. SDAO (Bob Keefer) facilitated the recruitment from the inception, resulting in acquiring a superior candidate. During recruitment, every phone conversation, email, video chat, and in-person interaction was performed with the utmost professionalism. We would not hesitate to enlist your consulting services in the future. Bob Keefer, Senior Consultant and Shanta Carter, Consulting Services Administrator, made the process seamless with exceptional results. Thank you, SDAO!"*

*Board of Directors and Staff  
River Road Park & Recreation District*



## LYONS RURAL FIRE PROTECTION DISTRICT

LRFPD is located in Lyons, a community 25 miles east of Salem. It provides a 24/7 response to fire, rescue emergencies and EMS incidents. The primary fire response area is 37 square miles, which includes a small city area, agricultural farming lands, heavy timbered canyon areas, and timbered wilderness.

*"The Lyons Rural Fire Protection District Board of Directors passed a motion to have SDAO come in to conduct an organizational review of the entire fire district. We had never done this process before. The SDAO team conducted a complete review of our department top to bottom. We were presented with and approved the final report. The board and staff have been using this report as a template to make positive changes, updates and create new opportunities for the fire district. Our goal is to provide the highest level of service to the patrons of our district. We believe following this roadmap we can up our game internally and externally to provide that higher level of service."*

*Gary Rychard, Board President  
Lyons Rural Fire Protection District*



## SCAPPOOSE DRAINAGE IMPROVEMENT COMPANY

SDIC is located in Columbia County and is responsible for drainage and flood control for approximately 5,700 acres. The levee is roughly 10 miles long and serves around 900 landowners across 6,100 acres. Without SDIC's levee and drainage facilities, much of the housing, commercial uses, farming and recreation within its boundaries would not be possible.

*"SDAO has helped us with our confidence in the process of making decisions on behalf of those we serve. Their special training service provided a tune-up of our knowledge of public meetings laws, record-keeping, board communications rules, conflicts of interest, liabilities, and other rights and responsibilities. Our consultant, George Dunkel, was very knowledgeable and supportive. He also provided each of us with a folder full of reference materials and resources. I recommend SDAO's services to all of us who serve on boards as volunteers. A training session may sound like just another meeting to attend, but I believe board education ultimately saves time and prevents headaches.*

*SDAO's Organizational Assessment was a HIGHLY worthwhile use of our time and resources. Our consultant was excellent. She got right to work - in just a few days after we set up our contract with*

*her, she had toured our facilities, attended one of our meetings, and interviewed a large number of our stakeholders. We were impressed by how quickly she understood our organization and the challenges we face. She was very professional and provided honest feedback in a supportive manner. During the time she spent with us, she was a real member of our team and always readily available. At the end, she delivered an excellent 47-page report that is succinct and easy to follow. Among other things, it outlines the major areas where improvements are needed and contains the helpful resources needed to make these improvements. We highly recommend the Organizational Assessment and plan to make use of the other services provided by SDAO for volunteer boards like ours."*

*Karen Kessi, Board of Directors  
Scappoose Drainage Improvement Company*



# TESTIMONIALS

## HECETA WATER PUBLIC UTILITY DISTRICT

Heceta Water Public Utility District (HWPUD) was organized in 1966 to provide potable water to residents immediately north of Florence along the coast. HWPUD draws all of its domestic drinking water from Clear Lake. The district boundaries encompass about 11 square miles, and the district serves approximately 2200 homes within the area.

*“On two occasions, the Heceta Water Public Utility District has participated in SDAO’s Board Practices Assessment. The Board has enjoyed the experience because they feel that SDAO seriously cares about their performance as a board. The Consultant’s Impressions and Recommendations section of the assessment provides needed guidance for the board, it is timely, and it directly relates to the input received by the consultant.”*

Vickie Kennedy, Office Manager  
Heceta Water Public Utility District



## SEAL ROCK WATER DISTRICT

The Seal Rock Water District provides water to approximately 6,000 residents in Seal Rock, Oregon. It sources its water from Beaver Creek and the Siletz River depending on the season. The district has recently transitioned to a smart water grid to reduce water waste and demand, and it is planning for future resilience against potential natural disasters like earthquakes and tsunamis. The district is committed to conserving water and maintaining water quality, ensuring that residents can access safe drinking water.

*“I wanted to take a moment to express my sincere appreciation for the outstanding support Monica Shultz and Jim Knight have provided to Seal Rock Water District in developing our new Employee Handbook.*

*Monica and Jim have demonstrated exceptional expertise in HR compliance and have worked diligently on our behalf. Their professionalism, insight, and collaborative approach have made what could have been a complex and challenging assignment feel truly delightful, educational, and inspiring.*

*We’ve met on three separate occasions to work through the material, and I’m consistently impressed by how quickly the time passes during our sessions, a testament to their engaging and effective style. Their contributions deserve a multitude of praise, and I’m grateful for the opportunity to work with such talented individuals. Thank you for making their support available to member districts, it’s been a tremendous benefit to the district.”*

Adam Denlinger, General Manager  
Seal Rock Water District



## TILLAMOOK FIRE DISTRICT

Tillamook Fire District is located in central Tillamook County on the Northern Oregon Coast. It provides fire protection and emergency services to approximately 11,000 residents that live within the district boundaries of the City of Tillamook and the surrounding rural areas.

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*“As a board member and senior staff member in emergency services, I have worked with consultants from SDAO Consulting Services Program multiple times and have found the services, best practices recommendations and technical assistance to be invaluable during daily activities and stressful times. The consultants understand our needs and limitations. They provide practical recommendations and facilitate a consensus of action between all those involved. It has been a pleasure to work with SDAO’s dedicated staff.”*

*Eric Swanson, Board Member  
Tillamook Fire District*

## CANBY UTILITY BOARD

The Canby Utility Board (CUB) was created by Canby City Charter amendment in 1970. The City delegated authority to CUB to operate, manage all facilities, services, and aspects of the City’s Municipal Water Department. In 1982, a voter-approved city charter amendment transferred water assets ownership to the City Council. The CUB continued to operate and manage the water system.

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*“Canby Utility’s experience with SDAO’s consulting services, led by Mark Knudson, has been an invaluable resource for our organization—helping us navigate a complex RFP process for our new water treatment plant and successfully facilitating the recruitment our new General Manager. Mark’s expertise, professionalism, and steady guidance gave our board and staff confidence throughout, and the cost-to-benefit ratio was outstanding, delivering high-level expertise at an affordable rate. We highly recommend SDAO’s consulting services to any organization seeking reliable and expert support.”*

*Barbara Benson , Interim General Manager  
Canby Utility Board*



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## CONTACT US

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