

ATTACHMENT C

STATEMENT OF QUALIFICATIONS (SOQ)

(Revised Pursuant to Addendum No. 2, September 13, 2016)

Section 1: ADR Provider Contact Information & Languages			
Last Name	Barg	First Name	Libby
Company Name	Barney & Worth, Inc.		
Business Address	1211 SW Fifth Ave., Suite 2330		
City	Portland	State	OR
Zip Code	97204	Phone 1	503-222-0146
E-mail	libbybarg@barneyandworth.com		
Web Site	www.barneyandworth.com		
Languages Spoken	English, Spanish	Fax #	503-274-7955
Section 2: Provider Overview			
<p>The following Section provides a brief overview of the provider's experience and qualifications</p> <p>Libby Barg, president and managing principal at Barney & Worth, Inc., has over 16 years of experience in meeting facilitation, public involvement, project management, planning, communications, and media relations for large and controversial facilities and programs. She is widely known for her planning and strategic communications expertise, working with elected officials, interest groups and the general public to build long term support for public projects.</p> <p>Clients value Libby's expertise with committee management and facilitation as well as her commitment to well organized and efficient meetings that accomplish goals. As a trained facilitator, she specializes in managing and facilitating meetings for large groups and committees: collaboratively developing agendas and meeting plans, providing timely and informative meeting notifications, and documenting meeting outcomes and next steps. Her facilitation style is inclusive; ensuring everyone has an opportunity to participate while staying on-time and on-topic. A hallmark of her meetings—they always end on time.</p> <p>Over the last decade, Libby has developed facilitation protocols for electronic polling to help large groups direct their time and attention to only the most critical topics. Anonymous, electronic polling quickly shows participants what issues they agree on and what needs more attention. Libby's polling technique has been used successfully to allow groups to tackle complicated topics in a timely and uncontroversial manner.</p>			

Section 3 Services Offered and Rate			
Type of Service Key Person Desires to Offer & is Qualified to Offer	ADR Provider Billing Rate per hour	Support Staff Billing Rate Per Hour (Rate/Title)	The following items, if checked, are expenses that may be passed through at cost to the agency (See Price Agreement for details):
<input type="checkbox"/> 1. A <u>Mediation General Practitioner</u> is an impartial third party who assists two or more parties in reaching a mutually acceptable resolution to a controversy. These Practitioners have broad mediation experience and skills and are able to adapt mediation to a wide variety of circumstances, including workplace disputes.	00.00	00.00 to 00.00 (range) Administrative Assistant	<input type="checkbox"/> Copy/print charges <input type="checkbox"/> Facility Use/ Rental Fees
<input checked="" type="checkbox"/> 2. A <u>Facilitation General Practitioner</u> is an expert at helping large groups work effectively towards a desired objective. These Practitioners have sufficiently broad experience and skills so as to be able to design and facilitate a large group process to achieve variety of goals or objectives.	210.00	85.00 to 120.00 (range) Administrative Assistant	<input checked="" type="checkbox"/> Copy/print charges <input checked="" type="checkbox"/> Facility Use/Rental Fees
<input checked="" type="checkbox"/> 3. A <u>Public Policy Facilitator</u> is an expert at helping governmental entities and diverse stakeholders reach agreement on controversial public policies or public projects, often within a complex legal, political or regulatory context. These providers are experienced at assessing, designing, convening and facilitating collaborative processes.	210.00	180.00 Senior Associate 160.00 Associate 120.00 Research Associate 85.00 Graphic Design 80.00 Support	<input checked="" type="checkbox"/> Copy/print charges <input checked="" type="checkbox"/> Facility Use/Rental Fees
<input checked="" type="checkbox"/> 4. A <u>Public Involvement Practitioner</u> is an expert at helping governmental entities engage the public on public issues or projects. These providers are able to design and implement an appropriate public involvement process from projects that seek to inform or educate the public to projects that allow for greater public involvement via consultation or collaboration.	210.00	180.00 Senior Associate 160.00 Associate 120.00 Research Associate 85.00 Graphic Design 80.00 Support	<input checked="" type="checkbox"/> Copy/print charges <input checked="" type="checkbox"/> Facility rental fees <input checked="" type="checkbox"/> Mail or bulk email fees <input checked="" type="checkbox"/> Telephone charges <input checked="" type="checkbox"/> Website hosting, online software or online services fees <input checked="" type="checkbox"/> Video production services <input checked="" type="checkbox"/> Other Subcontractors

Section 4A: Does the Provider charge travel expenses to provide services in your area?

County or County Area	Available to work in this area without charging travel expenses.	Available to work in this area but will charge travel expenses
1 Clatsop, Columbia, Tillamook – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 Washington, Multnomah – Counties	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 Polk, Marion, Yamhill – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4 Lincoln, Benton, Linn – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5 Lane – County	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6 Douglas – County	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7 Coos, Curry – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8 Josephine, Jackson – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9 Hood River, Wasco, Sherman, Gilliam, Wheeler	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 Jefferson, Crook, Deschutes – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11 Lake, Klamath – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12 Morrow, Umatilla - Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13 Wallowa, Union, Grant, Baker – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14 Harney, Malheur – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15 Clackamas – County	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Section 4B: Hourly Travel Charges. *If, in addition to allowable travel expenses, the Provider will charge for travel time and the travel time of administrative assistants or staff, or both, the hourly travel rate for Proposer and each of Proposer's administrative assistant and staff must be identified here: :*

Travel time will be charged at the regular hourly rate for the Provider, administrative assistants and staff.

Section 5: Standards the Provider Subscribes to and Licenses Held

- ☐ Oregon Mediation Association Core Standards of Mediation Practice, April 23, 2005
(<http://www.mediate.com/oma/pg61.cfm>)
- ☐ Association for Conflict Resolution, Model Standards of Conduct for Mediators, 2005 revisions.
http://www.imis100us2.com/acr/ACR/Resources/Model_Standards/ACR/Resources/Model_Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08
- ☐ Model Standards of Practice for Family and Divorce Mediation
http://www.imis100us2.com/acr/ACR/Resources/Model_Standards/ACR/Resources/Model_Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08
- ☒ International Association for Public Participation (IAP2), Code of Ethics for Public Participation Practitioners (See
<http://www.iap2.org/displaycommon.cfm?an=1&subarticlenbr=8>)
- ☐ Other professional standards that the provider subscribes to:
- ☐ Oregon State Bar #
- ☒ Other professional licenses: **Oregon Level 4 Water Treatment and Water Distribution Operator**

Section #6: Provider's Specialized Areas of Expertise		
Area of Expertise	Sub Specialty	Areas of expertise
Business and Finance	General	<input type="checkbox"/>
	Investment and Finance	<input type="checkbox"/>
	Patents or Intellectual Property Rights	<input type="checkbox"/>
Civil Rights	Civil Rights	<input type="checkbox"/>
Consumer	All Types, Consumer-Merchant Disputes	<input type="checkbox"/>
	Assistive Technologies	<input type="checkbox"/>
	Vehicle Sales, Service or Repair	<input type="checkbox"/>
Cultural	Cross Cultural, Ethnicity, or Related Fields	<input type="checkbox"/>
Education	Education	<input checked="" type="checkbox"/>
	Special Education	<input type="checkbox"/>
Environmenta	Agricultural Exceptions (goal 2)	<input checked="" type="checkbox"/>
	Agriculture	<input checked="" type="checkbox"/>
	Air, Land and Water Quality	<input checked="" type="checkbox"/>
	Coastal	<input checked="" type="checkbox"/>
	Endangered Species or Wildlife	<input checked="" type="checkbox"/>
	Energy	<input type="checkbox"/>
	Forestry	<input checked="" type="checkbox"/>
	Hazardous Materials and Environmental	<input checked="" type="checkbox"/>
	Other Natural Resource Related	<input checked="" type="checkbox"/>
	Water Resources, Wetlands	<input checked="" type="checkbox"/>
	Governmental and Regulatory	Government-to-Government (e.g., state-tribal)
Professional Licensing		<input type="checkbox"/>
Public Utilities		<input checked="" type="checkbox"/>
Human Services	Child Dependency and Permanency Planning (Adoption)	<input type="checkbox"/>
	Disability	<input type="checkbox"/>
	Family Services, including Service Plans	<input type="checkbox"/>
	Health Care	<input type="checkbox"/>
	Senior Services	<input type="checkbox"/>
	Social Services	<input type="checkbox"/>
	Vocational Rehabilitation	<input type="checkbox"/>
	Public Assistance - AFS	<input type="checkbox"/>
International	International	<input type="checkbox"/>
Labor and Employment	Collective Bargaining and Labor	<input type="checkbox"/>
	General Employment and Human Resources	<input type="checkbox"/>
	Workers' Compensation	<input type="checkbox"/>
	Workplace Interpersonal Disputes	<input type="checkbox"/>
Torts or Insurance Claims	Torts or Insurance Claims	<input type="checkbox"/>
Transportation, Housing and Land Use	Construction Industry & Contracts, Civil Engineering	<input type="checkbox"/>
	Eminent Domain	<input checked="" type="checkbox"/>
	General Planning	<input checked="" type="checkbox"/>
	Growth Management	<input checked="" type="checkbox"/>
	Housing	<input type="checkbox"/>
	Land Use	<input checked="" type="checkbox"/>
	Railroad	<input checked="" type="checkbox"/>
	Real Property	<input checked="" type="checkbox"/>
Siting Controversial Projects or Facilities	<input checked="" type="checkbox"/>	

Section 7: Relevant Education and Training

Libby holds a BS degree in Fisheries and Wildlife Biology from Kansas State University and a Masters in Community and Regional Planning from the University of Oregon. Libby has attained the State of Oregon's Level 4 Water Treatment and Water Distribution Operator licenses. Libby is a proficient Spanish speaker.

Section 8: Relevant Training Conducted by the Provider

Libby is active in Oregon Association of Clean Water Agencies and the Pacific Northwest Section of the American Water Works Association. Through both organizations, Libby has been actively involved in public involvement and facilitator training. She has written papers and given papers at conferences, one-day training seminars and short-schools. Most recent training conducted includes Women in Leadership Symposium (Portland and Seattle, 2015 and 2016), Strategic Water Quality Communications Workshop (2016) and Waterworks School Clackamas Community College (2015 and 2016).

Section 9: Workplace Mediation Experience

Libby is not seeking selection in the Mediation General Practitioner category.

Section 10: Litigation Settlement Related Experience

Libby is not seeking selection in the Mediation General Practitioner category.

Section 11: Overall Mediation Experience

Libby is not seeking selection in the Mediation General Practitioner category.

Section 12: Facilitation Experience

Libby has more than 15 years of experience designing and facilitating meetings, many on technical and controversial topics with an expertise in drinking water, wastewater and stormwater utilities. The groups she has worked with have included public agencies, elected officials, business groups, non-profit organizations, advocacy groups, environmental organizations and citizen activists. She has worked with an estimated 100 advisory bodies guiding them toward consensus. This year alone Libby has likely recorded 200 hours of facilitation experience. Each project can last from 8 hours, on the low end as is the case with the Hillsboro SDC Advisory Committee or upwards of hundreds of hours such as for the multiple facilitation projects for the Oak Lodge Sanitary District. Examples of facilitation work include Oak Lodge Sanitary District Surface Water Management Strategic Plan, Bend Sewer Master Plan Advisory Committee, and Waste Management Stewardship Committee.

Libby has facilitated Board meetings and management teams to help identify strategic direction for the organization. For the Metropolitan Wastewater Management Commission, Libby facilitated a peer to peer workshop for staff as well as Board meeting to set the values and strategic direction of the organization.

Libby has also facilitated processes on controversial issues that have significant financial implications for the communities. Recent examples include a citizen stakeholder group in Oregon City tasked with determining whether a charter amendment to increase water rates should be sent to the public, and the percent increase of the water rate. A similar project, the Hillsboro Water SDC Policy Group was tasked with recommending an equitable share of cost to be paid by new development for the City's new water source.

The processes designed by Libby ensure that concerns are addressed. For the Oak Lodge Sanitary District Boardman Wetlands Project, Libby facilitated an agreement between the neighbors, the District and the Boardman Watershed Community Committee to ensure that the new Boardman Wetland Complex could be a good neighbor while also being an asset to the community. Through the advisory groups created to provide input in the OSU - Cascades Long Range Development Plan, city residents and neighbors were able to weigh in on the campus design. Libby used electronic polling to break through vocal minority perspectives on the advisory committees and help them identify the areas of conflict and consensus.

Section 13: Public Policy Facilitation Experience

Many of the consensus-building processes facilitated by Libby government agencies and more than four interest groups. Libby has a skill for listening to each group and making sure that their perspective is understood and communicated to the larger group. With a win-win goal in mind, Libby designs the public policy facilitation process in a way that allows participants to search for solutions. An example is the Oak Lodge Water and Sanitary District merger which required numerous groups to support the change in organization and governance. The process involved hundreds of hours of facilitation with elected officials, staff and ratepayers of both districts. The facilitation required more than facilitating meetings as it involved a change in the way business was being done. Libby was able to guide participants through the process in a way that they learned to trust the outcome. A similar governance public policy facilitation project was Clackamas County's Water Environment Services which, with Libby facilitating, moved forward with prioritizing district issues for the four cities and two special districts in the service area.

Libby also facilitated the Bend Sewer Infrastructure Advisory Group. Monthly meetings for two-and-a-half years (over 660 project hours for Libby) resulted in a unanimous recommendation to support a \$85 Million capital improvement program and received support from the Bend newspaper.

Section 14: Experience as a Public Involvement Practitioner

Libby specializes in developing public involvement and outreach programs that support our clients' varied natural resource management initiatives: planning for public water supply and stormwater systems; watershed/wellfield protection programs; and transportation, land use and environmental projects. During her career, Libby has designed and implemented public involvement plans for hundreds of clients, accumulating thousands of hours of public involvement outreach. Many of the public involvement approaches used by Libby have been recognized nationally through awards, trade publication articles or conference sessions. The Pacific Northwest Section American Water Works Association has awarded Excellence in Communications awards to the following public involvement tools developed by Libby:

- Best Marketing Campaign: Drinking Water Rate Increase, City of Tigard**
- Best Videos: Salem's Underground Drinking Water Reserve; Saving Tomorrow's Drinking Water Today**
- Best Water Conservation Program: Lake Oswego's "Beat the Peak"**

Libby's public involvement experience includes involving the public in the identification of community priorities for the cities of Vancouver, WA, and Monmouth, Hermiston and Independence, OR. She worked with the City of Salem to create marketing and outreach materials for an expanded economic development program and provided support for the Salem Downtown Parking Stakeholder Outreach Program by staffing community parking forums and educational presentations. Libby also led public outreach for development of a 102-acre industrial site in the Portland area, which included stakeholder interviews and presentations to the neighborhood association. Libby's most recent public involvement experience includes:

- Public outreach task lead for the Eugene Water and Electric Board Water Reliability campaign that sought to educate and engage customers about the need for drinking water reliability and to support rate increases.**
- Project Manager for the Willamette Water Supply Program providing strategic insight in the development and implementation of outreach plans for the five cities and unincorporated Washington County. Outreach plans address communications with the general public, property owners along the 30-mile pipeline route, elected officials and other community leaders.**
- Public outreach for Troutdale Road Maintenance Funding which included facilitation of the City Council's process to identify the need for a local fuels tax measure and the voter education campaign to support the measure.**