



# Metropolitan Group

the power of voice

DRAFT AND UNPROOFED

To : Eric Vines, Executive Director, Gray Family Foundation  
From: Ezra Milchman, Beth Strachan  
Re: Proposal for continued strategic consulting and research services  
Date: February 13, 2014

Strategic Communication

Resource Development

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## Introduction

Multicultural Communication

Metropolitan Group (MG) is honored to be working as a strategic partner for Gray Family Foundation (GFF) as it explores a refined direction for its core programs. From our initial work with you facilitating your board and family council retreat in January, it is clear that you have a highly effective, energized and engaged group of leaders that want to invest considerable time and thought into revisiting fundamental philosophy and direction for GFF's impact over its projected lifespan.

Organizational Development

One clear next step coming out of the retreat is that GFF would benefit from foundational research into unanswered questions related to your theory of change. We believe this research will greatly inform the thinking we've articulated together around the problem you seek to address, the solution you envision, the strategies you will implement to achieve that solution, and the ultimate change you hope to stimulate.

MG is pleased to submit this proposed scope of work to continue guiding GFF through a period of creative exploration with research as the first step. We will assemble and manage a research team comprised of our own researchers, members of Sightline Institute, and policy researchers we rely on for assessing landscape and opportunities at the State capitol in Salem. You will have the ease of MG as a single point of contact and coordination for all aspects of the research process, and at the same time GFF staff will function as an integral member of the team with direct access to all the individual researchers on an ongoing basis.

Our scope of work outlined below purposefully extends across two of your fiscal years to create greater affordability and to reflect the time it will take to generate initial research findings. The scope includes work across three areas: research question formulation; research study completion; and strategic action plan finalization.

As always, we provide this proposed scope of work in draft as a start point for discussion and remain open to any changes needed to fit your goals and resources.

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# Scope of Work

## 1. Formulate Research Questions

MG will work with Gray Family Foundation staff, board and family members to facilitate a retreat in April 2014 (conference call option for those who cannot travel) as well as additional meetings as needed for the purpose of finishing strategic discussions necessary to inform next steps with research.

- a. **Finalize the revised mission, vision, values statement, and theory of change** statements for GFF outlined in the draft Strategic Action Plan.
- b. **Surface GFF thoughts on possible research questions** by sharing the illustrative strategies, tactics and metrics captured in draft in the Strategic Action Plan. Note: the strategies, tactics and metrics will be shared only as a means of stimulating discussion of research questions and will not be refined or implemented until research studies are significantly underway or completed.
- c. **Conduct detailed audience mapping** to clarify and prioritize the communities and stakeholders (captured in the Strategic Action Plan) that GFF most wants to reach and activate as part of its theory of change. Recognizing that research into “the general public” is costly and time-consuming, drive GFF choice-making around key populations and influencers that present a logical place to start. For each prioritized stakeholder group, begin to explore possible needs, motivators, and influencers that can be further clarified through research via direct engagement.
- d. **Prioritize key questions for research** using the revised mission, vision, values and theory of change to guide decision-making on what’s most important to explore. For instance, does the foundation want to research how to engage people more broadly in environmental education or might it want to study how civic discourse can be a vehicle for community activism?

**Deliverables:** 1) retreat facilitation to finalize mission/vision/values/theory of change statement; 2) prioritized audience map; and 3) prioritized list of research study questions.

*Timeframe: March-April 2014*

## 2. Conduct Research Studies

MG will work with foundation staff and board to assemble and manage a research team comprised of MG researchers, a Sightline Institute researcher, and a researcher with the ability to engage Oregon policymakers. The collective team will be charged with the design and implementation of the steps outlined below.

- a. **Amalgamate existing research** to understand those issues of interest to GFF that are already the subject of significant study, such as: the economics of outdoor education; best practices from outdoor education programs in other states; the state of natural resources and environmental ethics in Oregon.
- b. **Conduct original research** with prioritized stakeholders through a mix of one-on-one interviews, community focus groups, and on-line or telephone surveying. Possible areas of study include:
  - Which priority needs/ values are the best ones to tap in order to inspire and feed sustained action on stewarding communities natural and built?
  - How could public sector or philanthropic programs best be designed to serve identified needs/ values?
  - What ideas and interests exist within the State of Oregon for shaping, funding and/or delivering these programs?
  - What messages would be the right ones to communicate the values and programs that inspire communities to take action?
  - Which communication vehicles, pathways and messengers are the right conduit to activate different stakeholders groups and cultures?
- c. **Synthesize existing and original research** studies to begin to answer key questions related to how different stakeholder groups can best be inspired/ activated to steward communities natural and built.
- d. **Formulate and test engagement models and messages** with prioritized stakeholders to assess efficacy and make refinements as needed in order to incorporate them into GFF programs and communication.
- e. **Produce a Research Report** on the learning from each area of study suitable for distribution by GFF as a thought leadership piece for the field.

**Deliverables:** 1) audit of existing research; 2) summary report on original research findings; 3) engagement models and messages; and 4) research report suitable for distribution to the field.

*Timeframe: April-December 2014*

### 3. Finalize Strategic Action Plan

As research findings emerge through the course of the work above, MG will guide Gray Family Foundation through a series of discussions designed to reflect on what is learned and how it should be used to shape future programs of the foundation and its partners/collaborators. We envision these discussions culminating in the completion of a detailed 3-year Strategic Plan that will inform and guide the redesign and delivery of core GFF programs.

- a. **Issue Findings & Recommendations Report** that examines the research findings in the context of implications for GFF direction and core program design.
- b. **Facilitate discussion of refined GFF direction and programs** based on the research report and the Findings & Recommendations Report.
- c. **Identify the greatest legacy opportunity for GFF to invest in** as it spends down its corpus over a 50-year (or less) investment period.
- d. **Finalize a Strategic Plan** to seize the identified opportunity(s). Clarify and ensure staff, board and family consensus around the core GFF strategies, tactics, metrics and budget for 2015-2018.

**Deliverable:** 1) lasting legacy concept; final GFF Strategic Plan 2015-2018.

*Timeframe: January-February 2015*

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Numbers

February 13, 2014 10:54 AM

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Eric, good talking today. To recap, here are the numbers we're working with as a guide:

Phase 1: Finalize mission/vision/values/theory of change and research question formulation = \$30,000-\$50,000 over 1-2 months

Phase 2: Research implementation and report for the field = \$425,000-\$475,000 depending on Sightline costs over 6-9 months

Phase 3: Strategic plan and business plan for life of foundation, with 3 year detail for re-engineering programs = \$75,000 over 3 months

Total: \$530,000-600,000 over 9-13 months, and it could run a bit longer as these things often do

We could scale back to \$500,000 if needed by limiting # constituencies researched and limiting different research approaches (maybe drop polling or surveying), changing our role in producing the research report for the field, containing Sightlines costs, and/or limiting length of MG time to complete the work. Scaling back to \$300,000 would take some cutting of muscle and connective tissue so to speak.

Let me know windows Mon or Tues to talk (or Wed early morning if that's the only things work). Look forward to your mountaintop ah ha moments. Think big and creative my friend.

Best, Ezra

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