**Statement of Work (SOW)**

**Encore Fellows Program**

**Social Venture Partners Portland**

**Instructions for Completing the Statement of Work:**

This form is the Statement of Work for the Social Venture Partners Portland Encore Fellows program. The SOW should be jointly completed and agreed upon by the Encore Fellow and Executive Director or Hosting Manager of the Work Host agency **within two weeks of starting the assignment**. When the SOW is first completed and agreed upon, please submit a copy to Fellows Program Director, **steve@svpportland.org**. It is not unusual for assignments to evolve during the course of a Fellowship; plan for regular reviews between the Fellow and Hosting Manager to discuss progress and evolve the SOW as required.

**PLEASE NOTE: To support a successful Fellowship experience, the SVPP Encore Fellows program provides regular educational programs (~monthly) and 1-1 coaching (~quarterly) to Fellows. These activities require approximately an additional 40 hours of Fellow’s time above the 1000 hours of the Fellowship. Work hosts are encouraged to support the Fellow’s use of these program benefits.**

**Date**: 9/22/14

**Name of Organization:** Institute of Portland Metropolitan Studies/Population Research Center (IMS/PRC) and Institute on Aging (IOA) /College of Urban and Public Affairs, Portland State University

**Senior Level Hosting/Manager Name**: Sheila Martin, IMS Director, and Margaret Neal, IOA Director

**Encore Fellow Name**: Peggy Valenti

**Position Title/Project Name(s):** Director of Strategic Communications

**Role/Project Description:**

* 1. Work with IMS/PRC and IOA to develop detailed communications plans consistent with the CUPA framework but more specific to IMS/PRC and IOA audiences:

1. Analyze current coverage of IMS/PRC and IOA to inform the strategies:

* Extent and nature of current coverage
* Potential for gaining coverage among media outlets important to our stakeholders;

1. Develop communications plans for IMS/PRC and IOA that, if implemented, will meet the following goals:

* Create a strong identity for IMS/PRC and IOA within the College of Urban and Public Affairs at PSU.
* Generate media exposure about our research, data, or other activities through local and regional media outlets.
* Enhance the IMS/PRC and the IOA reputations as sources for credible data, a provider of high quality policy research, and a convener of regional leaders about important regional issues.
* Increase awareness among IMS/PRC and IOA stakeholders (decision makers and citizens) of the services provided by the IMS/PRC and the IOA.

1. Train IMS/PRC and IOA staff to implement the respective plans.
2. Consult with CUPA’s Communications Director and the Dean to align the IMS/PRC and IOA strategies with the CUPA strategy and generate ideas where needed for CUPA’s communications strategy.
   1. **IMS/PRC and IOA Communications Plan details**

Each plan should include the following:

* A clear statement of the goals of the plan
* A profile of IMS/PRC and IOA audiences
* A set of highly credible and memorable messages that define IMS/PRC and the IOA and make claims to the policy and practice research markets that we serve.
* A list of the communication channels (local press, local broadcast, specialized national blogs, social media) most effective for conveying the key messages to our audiences
* A schedule of practical strategies, activities, and materials to be conveyed through each of these channels
* Assistance in assigning staff to each of the activities.
* Recommendations for how and when to partner with University Communications, the College of Urban and Public Affairs, and other PSU organization on the campus and the community to assist in reaching our audiences;
* A plan for evaluating the outcomes of the communications strategy

**Encore Fellow Role**: The Fellow will lead the development of the strategic communication plans for CUPA, IMS/PRC and IOA and will work with IMS/PRC and IOA to develop annual workplans to implement the strategic plans and will train IMS/PRC and IOA staff to implement the plan.

**Duration (start/complete dates):** October 13, 2014

**Schedule (part-time, full-time):** Part-time

**Work Location(s):** Urban Center, PSU: 506 SW Mill Street

**Onboarding** **and Integration**- what will your organization do to onboard and integrate the Encore Fellow into your organizational mission and work?

We will create a courtesy faculty appointment that will allow Ms. Valenti access to the library, the computer network, as well as other resources at PSU. We will immediately introduce her to all of our staff and encourage her to meet with them individually to understand the scope of the work that they perform.

**Position/Project Scope** – what the Fellow will and will not address in the position/project.

We believe the scope is pretty well spelled out above.

**Organizational Need for the Position/Project** – Describe high priority work that builds lasting organizational capacity and cannot be accomplished with existing resources.

The development of a smart and practical communications strategy for CUPA, IMS/PRC and IOA is essential to the primary objective of our respective institutes: for IMS/PRC, to influence the public realm by providing information and data relevant to public policy debates and decisions, and for IOA, to enhance understanding of aging and facilitate opportunities for elders, families, and communities to thrive. If people are not aware of and using the resources that we provide, we cannot fulfill our respective missions.

**Project Timeline** – Describe major phases of the project and expected completion date.

*Phase I - Information gathering and development:* October – December 2014

Deliverable: Memo describing the following:

1. A clear statement of the goals of the each plan (IMS/PRC plan and CUPA IOA plans)
2. A profile of IMS/PRC and CUPA and IOA audiences and their current awareness and understanding of mission and activities.

*Phase II - Strategy Development part I: January – March*

Deliverables:

1. A set of highly credible and memorable messages that define CUPA and IMS/PRCand IOA and make claims to the markets that we serve.
2. A list of the communication channels (local press, local broadcast, specialized national blogs, social media) most effective for conveying the key messages to our audiences.

*Phase III: Strategy Development Part II: April – June*

Deliverables:

1. A schedule of practical strategies, activities, and materials to be conveyed through each of channels
2. Assistance in assigning staff to each of the activities, training staff and developing a communications guide for IMS/PRC and IOA

*Phase IV: Strategy evaluation and refinement*

1. A plan for evaluating the outcomes of the communications strategy;
2. Development of IT tools to gather required data and generate reports;
3. Recommendations regarding how to adjust strategy based on evaluation results.
4. Recommendations for how and when to partner with University Communications, the College of Urban and Public Affairs, and other PSU organization on the campus and the community to assist in reaching our audiences

**Decision Framework for the Project –** Identify phase review meetings, interim report sign-offs, strategy review, etc.

We will meet after each phase to review the work completed, provide feedback, and discuss implications for the following phase

**Measuring Impact** – what are the Position/project goals and how will each be measured?

This will be built into Phase IV of the workplan – evaluation of the strategy. We will set up immediate and longer term feedback loops that will allow us to adjust the strategy as needed according to our impact on key audiences.

**Key Inputs or Dependencies –** what will your organization provide that is critical to the success of the position or project (e.g., information, access to individuals or functions within the organization, office space, equipment or services, and other dedicated resources)?

Access to board members, stakeholders, and other key audiences.

**Sustainability of the Work** – what resources, people and funds will the organization dedicate to maintaining the project deliverables once the Fellowship/project is completed?

The Fellow will complete a training manual that will allow staff and students to implement the respective communications plans on an ongoing basis, and a set of suggestions for adjusting the plans as longer term feedback is received.