

Company Profile Association Management Services

Commitment to Excellence and Service

The cornerstone of Western Advocates' business is our commitment to delivering advocacy and association management services at an unrivaled level of quality. The intensive experience and training of our staff has enabled the company to not only successfully represent our clients before a wide array of state and local government agencies, but also to manage overall association activities when needed.

When providing overall association management, we have an extensive track record of event planning, membership database maintenance, publication of newsletters, website creation and updates, and all the other unique needs of individual membership organizations.

Current Association Management Client List

Western Advocates currently manages four organizations, split between one made up primarily of private sector members and three primarily of public sector members. The four are:

Oregon Transit Association

With over 70 members from mass transit districts, for profit providers, vendors, transportation districts, nonprofit providers, businesses, associates, cities, counties and transit users, the mission of the OTA is to assist members in the development and improvement of efficient, safe and convenient transportation services, techniques and methods, facilities and equipment. WAI works diligently to ensure that all objectives of the OTA are implemented and executed at the highest caliber of professionalism and quality.

Services provided by Western Advocates since 2010:

- Planning, staffing and execution of the Annual Oregon Transportation Conference which is held annually and involves the participation of over 250 participants and vendors
- Planning and staffing of the OTA Legislative Day at the Capitol
- Staffing and overall strategic support and

planning for the OTA Board of Directors, including monthly board meetings

- Grassroots efforts including mobilization and education on state, local and federal issues
- Maintenance of a world wide web site dedicated to keeping members informed
- Overall daily management of the association including phones, member support, communications, and bookkeeping

Significant accomplishments

Increased attendance at OTA's 2010 Public Transportation Conference while decreasing expenses by almost 20%; also produced a higher quality of all conference materials and increased number of vendor/exhibitors. In March, 2011, handled all arrangements for "Transit Day at the Capitol," which saw the number of attendees double from the same event in 2009.

National Association of Industrial & Office Properties, Oregon Chapter

A 150-member organization of developers, owners, managers, and brokers of commercial and industrial real estate.

Services provided by Western Advocates since 2006:

- Planning and staffing of monthly board meetings and monthly informational events.

- Coordination of regional government affairs efforts
- Planning and staffing of annual 400-player golf tournament.
- Website maintenance (www.naioporegon.org).
- Maintenance of all financial accounts, provide monthly reports to board, and interface with CPA to produce annual tax return.
- Production and distribution of quarterly electronic newsletter on government affairs issues

Significant accomplishments

Selected as "2009 Chapter of the Year" for U.S. and Canada by national association as a result of breaking new attendance records at chapter events, attracting attention from regional news media, establishing new programs for younger members, serving as a catalyst for new industry coalitions, and growing membership during a very challenging time for the real estate industry. Chapter was also recognized nationally in 2007 and 2008 as having best government affairs/legislative programs. Membership has increased 40% during the four years under Western Advocates management.

Oregon Municipal Finance Officers Association

A 489-member organization of city, county, and special district finance managers.

Company Profile Association Management Services

Services provided by Western Advocates since 2008:

- Planning and staffing of Northwest Government Finance Institute, a statewide educational conference for approximately 200 attendees
- Planning and Staffing of OMFOA Annual Spring Conference, a three-day event with social networking, educational speakers, and banquet for approximately 300 attendees
- Coordination and planning of quarterly board meetings and activities
- Administering website (www.omfoa.org), including registrations for events, job board postings and maintenance
- Maintenance of all financial accounts, provide routine accounting services and timely financial reports to the Board of Directors
- Provide support to organization's committees
- Assist in the administration of OMFOA's Certification Program

Significant accomplishments

Took over association management after sudden departure of previous manager, just three months before a major conference. WAI was able to pull off that conference and has increased budgeted profits of subsequent conferences by 40% for the first and 100% for the second.

Willamette River Water Coalition

A coalition formed by intergovernmental agreements between four local governments (Tigard, Tualatin, Sherwood and the Tualatin Valley Water District) that have united to preserve access to the Willamette River as a potential municipal and industrial water source for each of these growing communities.

Services provided by Western Advocates since 2000:

- Organization and staffing of quarterly board meetings.

- Management of public relations and education efforts.
- Budget and work plan preparation.

Staff Profiles

Kelly Ross, President

Kelly Ross began his professional career in 1980 by becoming Oregon's youngest elected county commissioner at the age of 24. Subsequent positions included public affairs director for a Los Angeles-based public policy think tank, an association manager and lobbyist, and a government affairs consultant to business organizations, property owners and developers. His articles on various public policy issues have appeared in numerous local and national publications, and he is a frequent speaker to groups around the country.

Prior to becoming president of Western Advocates in 2005, Ross served for eight years as Chief Lobbyist with the Home Builders Association of Metropolitan Portland. While in that capacity, the association's lobbying accomplishments were recognized four times by the National Association of Home Builders to receive its "Local Government Affairs Program of the Year" award. A graduate of Willamette University, Ross has also served on numerous state and local advisory committees and commissions.

Misty Slagle, Association Manager

A graduate of Western Oregon State College, Misty has extensive experience both in the legislative process and association management. She began her career by working for three sessions in the Oregon Senate as legislative staff before joining a Salem-based association management company that focused on agricultural trade associations.

Immediately prior to being hired by Western Advocates, Misty spent nine years working for the Home Builders Association of Metropolitan Portland, where she served as the organization's

Political Affairs Director. In addition, her responsibilities also included the organization's educational programs, nonprofit foundation, and several committees.

Tracy Rutten

A graduate of the University of Oregon, Tracy joined the staff of Western Advocates in 2003 after working for the Springfield Chamber of Commerce.

With experience in both state lobbying and association management, Rutten has worked with a wide-array of clientele including the Special Districts' Association of Oregon, the Oregon Fire District Directors' Association, the Clackamas County Business Alliance, the Oregon Physical Therapy Association, and the Oregon State Chamber of Commerce.

Tracy has extensive experience in providing support services to a variety of associations including website maintenance, membership relations and communication, meeting planning and support, newsletter formatting and distribution and event planning.

Tomilynn Ross

With over twenty years of experience managing trade associations, Tomi began her career as Executive Officer for the Umpqua Valley Home Builders Association in Roseburg, moved to Portland in 2000 to become Deputy Director for the Portland Building Owners & Managers Association (which managed five other associations), and joined Western Advocates in 2006. She has a long history of successful event planning (including golf tournaments of over 400 players), membership database management, and organizational communications.