



Iowa Balance of State Continuum of Care Strategic Plan

**Proposal Submitted to
Iowa Balance of State Continuum of Care**

Submitted by SPPG + Essman Research
November 11, 2020



Wednesday, November 11, 2020

Courtney Guntly
Iowa Balance of State Continuum of Care Director
Institute for Community Alliances
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E: courtney.guntly@icalliances.org

Dear Ms. Guntly and Iowa Balance of State Continuum of Care Board Members:

State Public Policy Group + Essman Research (SPPG) is pleased to submit our proposal to guide and execute a strategic visioning and comprehensive planning process for your newly formed organization. We would appreciate the opportunity to lead this project, and we believe our experience in strategic planning, particularly for non-profit organizations and government entities, would enable us to get your organization off to a great start.

At SPPG, we approach strategic planning with a very holistic process. We pair our team with your team at the very start to ensure clear expectations are set, effective communication is in place, research needs are identified to ensure decisions throughout the process are informed by reliable data, and all stakeholders are engaged to ensure thorough input.

We will partner with you until you are completely satisfied that your organization's vision, strategic plan and implementation process are in place and your direction forward is crystal clear.

After reviewing our proposal, if you have any questions or need additional information please let us know. Our proposal outlines a process that we believe would be most conducive for achieving your goal. We are happy to discuss and make any modifications you desire.

Thank you for the opportunity to submit our proposal and for taking your time to review it. We would be honored to partner with you in your success and future.

Sincerely,

A handwritten signature in black ink, appearing to read "Brianna Steirer".

Brianna Steirer
Senior Program Manager

Why SPPG?

STRATEGIC PLANNING IS WHAT WE DO

State Public Policy Group + Essman Research (SPPG) is well suited to facilitate the IA BoS CoC's strategic plan and identify your next steps forward. Our consensus-based process, honed over many years and scores of strategic plans, has proven effective because it ensures all stakeholders are engaged and their voices heard.

Developing an organization's first strategic plan is complex. But when done well, the discussions about the mission, vision, threats, strengths, opportunities and goals produce a shared mindset of where the IA BoS CoC is at this moment, where it collectively wishes to go, and the next steps to move forward.

SPPG's approach to facilitation is based on openness and inclusiveness that assures deliberative review, data gathering, public and organizational stakeholder participation, interim decision making, and respect given to all perspectives throughout the process.

While we have developed many strategic plans for non-profits, public and private entities, no two planning processes are the same. We stress adapting the work to the organization's unique culture and mission. Through the approaches identified in this proposal, the IA BoS CoC Board will be incrementally and deliberatively receiving and processing inputs with SPPG's facilitation. The resulting plan will clarify key elements critical to the organization's mission, vision, role, and its place in the broader picture of the state's progress in ending homelessness.

IA BoS CoC Board and staff, other organizations and programs, and additional stakeholders will have multiple opportunities to provide their thoughts about the direction of the IA BoS CoC. SPPG has the capacity and the track record to make certain that external and internal stakeholder voices are heard through in-depth interviews, surveys and experienced facilitation.

IOWA CONNECTIONS

SPPG has a strong presence and network throughout Iowa and an extensive record of working with regional planning bodies and non-profits. SPPG's work in policy and issue areas requires constructive and strategic engagement with multijurisdictional partners.

As a West Des Moines-based business, SPPG has a professional presence in the state. All staff have a personal interest and investment in the sound, integrated development of the state. In sum: SPPG knows Iowa and shares a passion and commitment to its development and growth of the people that live here.

The SPPG team for this project will consist of several senior staff who have experience with feasibility studies, strategic planning and communications, in-depth interviews, facilitation, community outreach, research, advocacy and the visual arts. Team members will have designated responsibilities and communicate formally and informally throughout the project. Biographical summaries for each team member are provided below.

Brianna Steirer is a Senior Program Manager with SPPG since June 2017 and will serve as team lead. Steirer leads a variety of large and small-scale projects, including but not limited to: organizing, marketing, and executing an annual 30,000-person art festival, managing a statewide association of workforce professionals, as well as serving as a consultant for non-profits, public and private clients as needed. Steirer also assists senior staff at Essman Research, a division of SPPG. Her experience

includes planning, executing, and analyzing the results of both qualitative and quantitative market research studies. She is committed to producing data-driven results for her clients.

Steirer graduated with Bachelor Degrees in Politics, Rhetoric, and Law, Politics, and Society from Drake University in Des Moines in May 2016. She is currently pursuing her Masters of Public Administration at Drake University.

Britney Samuelson is a Senior Program Manager and has been with SPPG since 2018. In this role, Samuelson leads teams focused on secondary research, outreach, public affairs, advocacy, and strategic planning. Samuelson enjoys working closely with clients to ensure their goals for the project are achieved and their expectations are exceeded. Prior to joining SPPG, Samuelson worked as a freelance policy researcher for United Way of Central Iowa, served as the executive assistant to Senator Tom Harkin (retired) at The Harkin Institute at Drake University, and held an internship at the Iowa Department of Human Rights, Office of Asian and Pacific Islander Affairs. Samuelson earned bachelor degrees in Social Justice, Spanish, and Applied Philosophy with a minor in Latin American Studies from Simpson College in May 2017.

Deborah Stearns, PRC, Marketing Research Director for SPPG + Essman Research, has more than 27 years of marketing research and management experience, and leads the research division at SPPG + Essman Research. Stearns is responsible for the development and implementation of all quantitative and qualitative marketing research projects – new business development, methodology and research design, questionnaire design and development, focus group facilitation, sampling, data collection, and data analysis. She authors research reports and maintains relationships with clients locally, within the state of Iowa, nationally and internationally to ensure client and corporate expectations are met for each project.

Stearns has been awarded the Professional Researcher Certification (PRC) through the Insights Association (formerly the Marketing Research Association/MRA) and has been certified by the Marketing Research Association for successfully completing the Professional Interviewer Module of the MRA's Data Collection Training Program.

Stearns is an active member of the Insights Association (formerly the Marketing Research Association/MRA) and the Council of American Survey Research Organizations/CASRO), the American Marketing Association (AMA), AMA Iowa, and is involved with the Downtown Des Moines Chamber of Commerce and the Des Moines Leadership Network. Stearns currently serves on the Leadership Board for the Iowa Arthritis Foundation. She is a former member of the Iowa State University Alumni Association Board of Directors (2015-2019) and the Greater Des Moines Partnership Communications Advisory Council.

Stearns, a Sioux City, Iowa native, received her Bachelor of Arts degree from Iowa State University where she majored in Journalism and Mass Communications, with an emphasis in broadcast, and minored in Business.

Emilee Harris joined SPPG in June 2019 as a Program Manager. In this role, Emilee assists teams with policy research and analysis, strategic planning, coalition building, public policy development, legislative and electoral advocacy, campaign management and communications with an emphasis on social media. Prior to joining SPPG, Emilee was a research associate for Vote Smart, where she tracked and analyzed environmental, national security and foreign relations, and health care policy. She also held internships with the Iowa Senate and Lutheran Services in Iowa, as well as managing local school board campaigns. Emilee graduated from Grand View University in 2018, earning bachelor's degrees in political science, public administration and sociology.

Hannah Gebhart came to SPPG in 2009 as Communications and Design Manager. Gebhart ensures that each project's individual message is presented effectively and within client specifications. Gebhart considers each client's personality and target audience to develop a unique, consistent identity and/or marketing campaign. Gebhart works closely with printers, mail houses, website hosts, and media outlets to make sure that each client's message reaches their target audience in a timely, cost-effective manner. Gebhart's diverse set of design skills allows SPPG to provide its clientele a multitude of creative solutions for their individual needs. She earned her Bachelor of Fine Arts from Drake University.

EXTENSIVE EXPERIENCE

To many, SPPG is synonymous with community participation, consensus building, and bringing a creative twist to planning and facilitated processes.

SPPG has a long history of taking on complex projects with multiple stakeholders, managing evolving opportunities, and facilitating processes and issues that lack focus or a clear path to a solution.

Examples of SPPG's work included here are projects that focus on strategic planning, significant stakeholder engagement, or are of a scope similar to that described for the IA BoS CoC strategic planning process:

Iowa Quality Standards. SPPG facilitated stakeholder-driven process to develop and promote common standards for programs serving those who are or at risk of homelessness. An initiative of the Iowa Council on Homelessness, SPPG worked directly with an advisory committee during the process and development, reported to the Council, conducted two rounds of statewide outreach and an electronic survey. Iowa Quality Standards were adopted by the Council on Homelessness in 2015.

Reference: Amber Lewis – amber.lewis@iowa.gov; 515-725-2209

Metropolitan Planning Organization (MPO) Strategic Plan. An eight-month planning effort designed to engage multiple stakeholders across jurisdictions to develop a consensus strategic plan for the organization. The process included individual interviews, SWOT and PEST analyses, issue-focused small group meetings, an online stakeholder survey, monthly facilitated sessions of the planning committee, coordination through co-chairs and MPO staff leadership and development of the organization's first strategic plan.

Reference: R. Todd Ashby, AICP – tashby@dmampo.org; 515-334-0075

Oakridge Neighborhood Services Strategic and Transition Planning. Oakridge Neighborhood is a Section 8 housing development in Des Moines serving many low income individuals and families, including African and Asian refugees. SPPG engaged the board, staff, and residents of Oakridge to inform the development of the strategic plan.

Reference: Teree Caldwell-Johnson - tcaldwell-johnson@oakridgeneighborhood.org; (515) 244-7702

Iowa Nonprofit Association Feasibility Study and Recommendations. SPPG conducted extensive research for a small group of nonprofits seeking to start an Iowa nonprofit association. SPPG conducted focus groups, telephone and online surveys with leaders of nonprofit organizations across the state of Iowa. SPPG collected information about their organization's size, resources, greatest day-to-day challenges, and services needed. Following the data collection, SPPG created recommendations for how to structure and launch an Iowa Nonprofit Association.

Iowa Girls Justice Planning Initiative. SPPG facilitated a planning process with the expanded Iowa Girls Justice Initiative planning group to develop consensus recommendations for a system and services for girls in the juvenile justice system who have the highest needs. The system and services recommended by consensus agreement of the planning group will guide state policy makers in providing the services no longer available since the closing of the girls' state training school.

Iowans Experiencing Homelessness are Diverse

SPPG's history of working on the issue of homelessness and the organizations that serve individuals experiencing homelessness have led us to understand the complexity of the problem and the diversity of this population. This knowledge is key to executing a strategic plan for the IA BoS CoC that is grounded in reality and addresses the multi-faceted needs of the population and organizations it seeks to support.

EDUCATION

Education is not a defining factor of whether or not a person will experience poverty or economic hardship. Individuals experiencing homelessness in Iowa are often well educated—in fact, most have earned their high school diploma or GED, and nearly one quarter of individuals experiencing homelessness in Iowa went to college.

HOMELESSNESS DOES NOT MEAN JOBLESSNESS

Often people assume individuals experiencing homelessness are simply not working hard enough to improve their situation, however, data shows that this is typically not the case. In Iowa, 71% of families experiencing homelessness are headed by an individual that has a consistent income and 44% are currently employed. However, economic hardship, unexpected emergencies, and other external circumstances can still cause individuals and families with employment or a steady income to fall into homelessness. Additionally, about 7.2% of individuals experiencing homelessness in Iowa are veterans.

MINORITY STATUS

In every measure of homelessness status in Iowa (coordinated assessment, emergency shelter, permanent supporting, and rapid re-housing), the representation of nonwhite individuals is significantly higher than the rate of the general population. Minority individuals and families experiencing homelessness in Iowa also skew younger. Thirteen percent of the nonwhite homeless population is under the age of 18, whereas only 8% of the white homeless population is under 18.

PERSONS WITH DISABILITIES EXPERIENCING HOMELESSNESS

Persons with disabilities are disproportionately affected by homelessness and are more likely to experience chronic homelessness. In fact, nearly half (49%) of families experiencing homelessness in Iowa are headed by a person with disabilities.

Scope of Work, Work Plan & Cost Proposal

Strategic visioning and comprehensive planning process to create an actionable strategic plan.

PHASE 1 - EXTERNAL RESEARCH

December 1st to 15th

1. Meet with the Interim IA BoS CoC Board to review expectations and get initial input for Iowa research and implementation of the Scope of Work. Provide the Board with meeting notes and plans for proceeding with the project. (Estimated 15 staff hours)
2. Background (Secondary) Research – SPPG will do a scan of CoCs for substantive strategic plans and programs with an emphasis on states similar to Iowa (examples: Wisconsin, Indiana, Nebraska, Ohio, Kansas & Missouri). (Estimated 15 staff hours)
3. Utilizing HUD's "BoS CoC Toolkit,"¹ the U.S. Interagency Council on Homelessness's "Expanding the Toolbox"² and other resources, SPPG will assemble background information and examples for utilization in leading IA BoS CoC through a strategic visioning and comprehensive planning process. (Estimated 15 staff hours)

Phase 1 Cost: \$3,000

PHASE II – IOWA RESEARCH

December 15th to February 19th

1. Meet with the Iowa Council on Homelessness to gather the Council's thoughts and expectations for the overall effort to address homelessness in Iowa. Week of December 14th. Provide a summary report to the IA BoS CoC Board. (Estimated 10 staff hours)
2. Develop the Iowa research plan and review the plan with the Interim IA BoS CoC Board. While the secondary research of other states will be informative for developing potential strategies and plans for Iowa, the input from Iowa homelessness stakeholders will be a vital phase of this project. We want to ensure the Iowa vision, strategy and plans address Iowa's needs and goals. Week of January 4th. (Estimated 12 staff hours)

Research components will include:

- A. Interviews with homeless-serving organization leaders, front line workers and other stakeholders (January 11th to 22nd). An option for interviews with additional stakeholders, including with individuals currently experiencing homelessness, can be discussed in the initial planning meetings with the board. SPPG will provide a Summary Report to the Board. (Estimated 40 staff hours)
- B. Virtual focus groups (January 25th – February 5th).
 - » Focus group with IA BoS CoC Board (Estimated 10 staff hours)
 - » Two focus groups with stakeholders serving homeless individuals (Estimated 24 staff hours)
 - » Focus Group Summary Report (Estimated 10 staff hours)
- C. Online survey of Iowa homeless-serving organizations in the 96-county Balance of State region (February 8th to 19th). Draft survey; Board review and input; distribute the survey; survey follow-

¹ <https://files.hudexchange.info/resources/documents/Balance-of-State-Continuum-of-Care-Toolkit.pdf>

² https://www.usich.gov/resources/uploads/asset_library/USICH-Expanding-the-Toolbox.pdf

up; compile survey results; and Summary Report delivered to the Board. (Estimated 40 staff hours)

Phase II Cost: \$10,500

PHASE III – STRATEGIC GOALS, COMPREHENSIVE ACTION PLAN; TIMELINE & MEASUREMENTS

February 22nd to March 26th

SPPG will facilitate a series of four sessions with the IA BoS CoC Board:

1. Present the final research report for discussion and utilization in a brainstorming session to establish a shared strategic vision for Iowa which is, as described in the RFP:

- » Clearly stated;
- » Compelling;
- » Timely;
- » Describes a clear and present need;
- » Motivates people to act: and
- » A worthwhile challenge.

And, conduct a facilitated discussion on potential strategies and implementation plans for achieving the shared vision. (Estimated 24 staff hours)

2. SPPG will further develop the potential strategies and plans identified and present them for facilitated discussion and identification of further information needed. (Estimated 23 staff hours)
3. SPPG will research and provide any further information needed and facilitate a discussion and selection of strategies and implementation plans, including a detailed timeline to implement the plans and methods of monitoring and measuring performance for IA BoS CoC's vision and work. (Estimated 37 staff hours)
4. Presentation of Iowa's strategic vision and comprehensive plans for final approval. (Estimated 41 staff hours)
5. Subsequent meetings as needed to reach final strategy and plan conclusion.

Phase III Cost: \$9,000

Total cost for professional services: \$22,500

Expenses: Our professional services' cost includes office expenses, copies, travel within the Des Moines Metro area and incidental items. By utilizing internet based meeting services for focus groups and individual interviews, no additional travel is anticipated. If travel outside the Des Moines Metro area is required, mileage expenses are expected to be reimbursed at the state approved government rate. Additionally, if the Board desires professional printing of the final report that would be an additional cost item.

Note: This Work Plan has the flow of work in a slightly different order than the four stages outlined in the RFP. The SPPG recommendation implements an extensive external and internal research plan of various stakeholders before the RFP's proposed "Stage 1: Discovery - Vision and key goals with IA BoS CoC Board of Directors and Stakeholders." The RFP identifies Stage 1 for discovering a shared strategic vision. We recommend conducting the research of Iowa stakeholders first to inform the Board of the needs, perceptions, expectations and input of Iowa's homelessness stakeholders when establishing the shared strategic vision. We are open to either approach and will take the Board's direction on order.

General Information	
Vendor Name:	SPPG, LLC
Primary Contact Person:	Brianna Steirer
Primary Contact phone and email:	(515) 237-0338

Please complete each question with sufficient detail:

1. Do you foresee any supply or service disruptions in the contract period? If yes, what actions will you take?
No

2. What plans do you have in place to ensure continuity of supply and services?
At SPPG, we take a team-approach to all of our projects and client work. Team members meet regularly and share updates and progress on all elements of a project. This insures no element of a project gets delayed should any member of the team become unavailable on the project.

3. How long would it take to activate a contingency plan?
With regular team meetings and cross function engagement any contingency should be seamless and require little, if any additional time.

4. Describe your working capital/cash position and your ability to remain viable over the period of the contract.

SPPG has been in business since 1984. During the past 4½ years under the ownership of Brad Knott and John Norris at no time has SPPG been in arrears on payroll or any expenses or needed to utilize our line-of-credit. We have sufficient cash reserves to cover expenses and payroll for four months if revenues went to zero. At SPPG, we believe we do not exist to profit. Our mission is to bring positive social change. But, we do have to profit to exist.

5. Prove details of any material changes (e.g. ownership, structure, acquisitions etc. in the last financial year.

No changes in the last 4½ years. At the end of 2020, Co-owner John Norris' role will change from Partner to being "Of Counsel," with the possibility of selling his share of the business. The staff that would be on this project team are full-time staff that intend to be here for many more years.

6. Provide a list of 3 similar-sized customers. Include a description of products or services supplies and a contact name (name, designation, email, phone) for each.

We include several prior clients with contact information for references in our proposal.

- » **Metropolitan Planning Organization (MPO) Strategic Plan; Des Moines Area MPO**
Reference: Todd Ashby, Executive Director, Des Moines Area MPO;
e: tashby@dmampo.org; p: 515-334-0075
- » **Iowa Quality Standards Development; Iowa Finance Authority**
Reference: Amber Lewis, Homeless Programs Manager, Iowa Finance Authority;
e: amber.lewis@iowa.gov; p: 515-725-2209
- » **Oakridge Neighborhood Services Strategic and Transition Planning; Oakridge Neighborhood**
Reference: Teree Caldwell-Johnson, Chief Executive Officer, Oakridge Neighborhood; e: tcaldwell-johnson@oakridgeneighborhood.org; p: (515) 244-7702

7. What percentage of your business would we claim if you are successful and awarded this project?

Over the approximate three to four months for this project this would represent about 10% of our workload.

8. Does your company have any pending legal issues or constraints that could impact the performance of your products/service?

No

9. Please provide a detailed implementation plan, including timeline, for the start-up, work period and closing of the project.

This is provided in the Scope of Work/Work Plan in our proposal.

10. How will you monitor progress and performance on the account?

- » *How will you monitor and review the process to ensure any issues are addressed and implementations are improved if needed.*

We will follow the Work Plan timeline included in the proposal as closely as possible and measure progress to this timeline. There are multiple check in points in the Work Plan with the IA BoS CoC Board that include reports and progress updates to enable tracking of any implementation issues that need addressed and/or improve upon.

Please send this questionnaire with your submitted RFP to IA BoS CoC Director, Courtney Guntly at courtney.guntly@icalliances.org.