

Statement of Work

City of Coppel: Allies in Community™ (SOW.Allies.3)

March 16, 2018 May 31, 2018

Spring 2018 Allies

Networking, Focus Groups, Interviews, Data Collection, OCM Process, Communication, Analysis. Cohort Selection

Date: April 11, 2018

Buyer Phone: [972-304-3670](tel:972-304-3670) (office)

Client Name: City of Coppel, Texas

Buyer Name: City Manager

Buyer Email: MLand@coppelltx.gov

Bill to Name: Mike Land

Buyer Address:

City of Coppel
255 Parkway Boulevard
Coppel, Texas 75019-9478

The Services provided pursuant to this Statement of Work shall be governed by the terms and conditions attached hereto:

Overview of SOW Allies.3 March 16 – May 31, 2018

This work is a continuation of the Coppel Allies in Community Initiative. The main focus of this work is listening to a range of stakeholders across the community, detailing the challenges and opportunities of engagement across the City of Coppel. By the end of this SOW.3 period, focus groups and interviews will be completed, data collected, analyzed, and a report delivered, the first Allies in Community cohort selected, and curriculum design and development begun.

Description of Services:

Major Project Steps (1-8).

Details of each of the project steps are discussed in more detail (below) for your reference.

1. Survey Follow-up: Focus Groups | HOA Forum | Interviews
2. Focus Group and Interview Follow-up: Analysis and Report
3. Cohort Development and Selection
4. Outreach and Program Communication
5. Curriculum Outline Design

1. Kaleidoscope Survey Follow-up

In SoW.2, DiversityWealth identified a wide array of potential interview participants in conjunction with the Allies Steering Committee, the City Manager's Office (CMO) and other key stakeholders. In order to obtain a clearer picture of the wide range of community viewpoints, the next step is to create a variety of forums through which the community's insights and needs can be elucidated. The scheduled activities are detailed below.

Focus Groups

- A. Using State of the Art Qualtrics software, a registration survey was created to automatically filter interested participants into focus groups. >350 potential focus group participants were contacted, and those that responded were filtered into 10-12 focus groups. Each focus group focuses on the 9 targeted questions developed by the DiversityWealth team
 - i. Develop and maintain focus group participant list
 - ii. Expansion of focus groups design
 1. Create PowerPoint (Intro to Allies Initiative) for Focus Group Participants
 2. Design focus group questions.
 - iii. Develop State of the Art Qualtrics online survey registration
 - iv. Invite, follow up, and schedule candidates for the focus groups - Using initial recommendations received in SOW-2 as a base, new connections and focus group participants have emerged.
 1. Contacted >350 potential focus group participants.
 2. As per SoW-2, 10-12 focus groups were scheduled.
 - a. Email and phone scripts development
 - b. Multiple Email campaigns to invite candidates
 - c. Individual emails
 - d. Individual Phone calls
 - e. Confirming and following up with participants
 - v. Coordinate location and times in conjunction with City Manager's Office (CMO).
 - vi. Conduct focus groups
 - a. Each focus group will be 1.5 hours long and will focus on 9 questions.
 - b. Focus Groups will include a range of categories including long and short tenured residents,, faith groups, areas of service, etc.
 - c. Participants will include, Residents, Service providers, City and CISD Employees

HoA Forum

As the HoA presidents are integral to connections in their neighborhoods a decision was made to conduct a separate HoA Presidents' forum.

1. Interview, work closely with HoA Presidents Assoc., lead, Gary Tanel.
2. Create / coordinate HOA email invite
3. Conduct HOA forum, follow-up

Individual Interviews

Identified stakeholders were interviewed separately to gather unique insights and / or accommodate those with schedules who could not participate in scheduled focus groups.

2. Focus Group and Interview Follow-up: Analysis and Report

DiversityWealth will provide a summary report of the Focus Groups and interview follow-up findings, including specific challenges and opportunities and recommended next steps. The report will be delivered to the Allies Steering Committee and the CMO's office.

3. Cohort Development and Selection

Working closely with the Allies Steering Committee and the CMO's office, the DiversityWealth team will guide and develop Allies in Community Cohort 1 selection. The process will include a brief assessment screening and interview. Final approval of all processes rests with the CMO.

- a. DiversityWealth in conjunction with the Steering committee will conduct interviews for candidates needing additional screening.
 - i. Select candidates who are confirmed and candidates needing additional screening.
 - ii. Confirm the final cohort list.
 - iii. Identify potential cohort candidates.

4. Outreach and Program Communication

Based upon clear guidance from the CMO and City Council, DiversityWealth will facilitate the role of the Allies in Community Initiative as a connector between stakeholders – individuals and organizations – across the city of Coppell.

- a. Attend meetings to provide information and give presentations on the Allies In Community initiative.
 - i. External Stakeholders (Rotary club, Coppell Women's Club, Lion's club, etc.)
 - ii. Internal Stakeholders (City of Coppell employees, City Council, etc.)

5. Curriculum Outline Design

Final approval of all processes rests with the CMO.

- a. DiversityWealth will meet with the internal DW Team and Steering Committee to identify key themes and sub modules.
 - i. Create first draft of Training Objectives
 - ii. Use training objectives to create first draft of Training Outline
 - iii. Finalize training outline

TOTAL COST: Thirty One Thousand Dollars (\$31,000.00)

NOTE: Per your request, this Statement of Work removes certain services from the previously contemplated Statement of Work.. More specifically, these were the services under Items 3,6,7 & 8. Excluded items are listed in the attached Addendum. These items are now specifically the responsibility of the City of Coppell. DiversityWealth will provide support to the City of Coppell employees for these responsibilities.

Expenses

- Printing Materials & Supplies/Shipping & Handling. Client will pay actual printing and shipping for additional materials requested from DiversityWealth, plus a 10% handling charge.
- Recommend client print workbooks on-site (in-house). Vendor volume print estimate @ \$10-25 per workbook.
- Any DiversityWealth consulting, facilitation, and travel expenses are additional and billed at actual cost, plus a 10% handling charge. Client is responsible for indicating any applicable travel caps.

Requests for Changes - The parties agree to the deliverables and schedule for the Products and Services described in this Statement of Work. Any changes and/or addition of new deliverables, to the Products and Services may require an adjustment to the schedule and/or result in additional fees. DiversityWealth will review requests for changes to determine if such changes can be accommodated within the schedule and for the fees provided herein. DiversityWealth will provide Client cost estimates for any changes that require additional time and/or fees and will require Client's approval in writing prior to beginning the work.

Client specifically represents and warrants that it either owns or uses with permission of the owner any models or data that will be provided to DiversityWealth for inclusion in the course materials. Client further represents that it has the requisite ownership or has obtained requisite permission to authorize DiversityWealth to incorporate such model or material into the customized materials to be provided pursuant to this Agreement. Client shall indemnify and hold DiversityWealth harmless from and against all costs arising out of or resulting from any action by a third party against DiversityWealth that is based upon any claim that DiversityWealth' use of materials provided by Client infringe a patent, copyright or other proprietary right or violate a trade secret.

IN WITNESS WHEREOF, the parties hereto have caused this SOW to be executed as of the day and year first written above.

By:

By:

Title: DiversityWealth, Tasnim Benhalim.
Founder/Principal

Title: City of Coppell, Mike Land, City Manager

Please sign above and return this document to **Omar Benhalim** at Omar@DiversityWealth.com

Addendum to the City of Coppell: Allies in Community SOW 3 dated May 8, 2018 “Excluded Items”

6. Organizational Change Management (20 hours)

DiversityWealth will work in conjunction with the City of Coppell’s OCM provider to better define its increased role in the community

- a. Meet with vendor to identify and align the Allies in Community Initiative process with the OCM process going forward.
- b. Responsibilities will be defined
- c. Identify actionable steps that will be taken.

6. Ongoing Maintenance of Stakeholder Contact List (20 hours)

DiversityWealth will continue to expand and support the contact list of community stakeholders which has been created in support of the Survey Follow-up process.

- a. Continue work in conjunction with city to identify community servant leaders across Coppell
- b. Support contact list with information on areas of interest and connection

7. Communication Strategy (40 hours)

With the stakeholder support of this Allies Initiative, additional support will be given to diversify and support communication outlets for Allies in Community content throughout the Coppell community.

- a. Continuing maintenance and Expansion of City of Coppell website
- b. Creation of and coordination of a communication strategy with City of Coppell Communications stakeholders (internal and external).
- c. On going follow-up to provide guidance and necessary support for the communication strategy.

8. Networking and Coordination (80 hours)

Based upon clear guidance from the CMO and City Council, DiversityWealth will facilitate the role of the Allies in Community Initiative as a connector between stakeholders – individuals and organizations – across the city of Coppell.