



November 5, 2021

Joe Napoli
City Manager
Cooper City

RE: Broward County/Municipality American Rescue Plan Act Funding

Dear Mr. Napoli:

This letter documents our understanding of the engagement you have requested for your city, Cooper City (“Client”). Strategic Philanthropy, Inc. has been engaged by Client to provide grant consulting services for all six relief programs: (mortgage/utility/small business/rental/nonprofit and places of worship) through the *American Rescue Plan Act Funding*. The services include, but not limited to the following:

Consultative

- Assist in creating/finalizing a strategic rollout of the *American Rescue Plan Act Funding*. This includes, but is not limited to:
 - Provide recommendations on best practices for timeline and process
 - Assist with solidifying the criteria and guideline requirements
 - Determine the parameters for residents/businesses/organizations to qualify and apply for grant
 - Work with Client team to launch initiative
- Manage and implement the day-to-day initiatives determined by the rollout plan and timeline. This includes, but is not limited to:
 - Assist with answering requests via phone and/or email
 - Send weekly or monthly reports to City staff with applications data and next steps
 - Oversee the day-to-day operations, which includes coordinating and managing programming related activities

Application Portal Build-out & Website

- Assist with the creation of an online application portal
 - Online eligibility quiz for residents, organizations and/or businesses to qualify
 - Online application for residents, organizations and/or businesses to apply if they meet the eligibility quiz
 - Online appeals process application for residents, organizations and/or businesses



- Work with Client Marketing/Communication team to discuss key goals for external website
 - Assist with establishing layout for external site
 - Discuss layout/building additional pages to communicate Client's funding efforts, criteria/guidelines, FAQ, Contact etc.
 - Creation of recommended text for external site
 - Client Marketing/Communication team to consult with Strategic Philanthropy on suggested text
 - Create electronic messages for all applicants
- Develop scoring rubric for application review team

Grant Review & Execution

- Manage overall budget
- Organize the applications for residents' and/or business
 - Saving the individual applications & the documentation required
 - Data to be organized and scored
- Conduct due diligence on all documentation submitted:
 - Legitimacy of applicant
 - Applications meet the program criteria/questions; appropriate attachments are included and complete
- Coordinate report for Client team with applicant recommendations
 - Client to validate utility account / amount transfer internally
 - Client to write/disperse/mail checks to all residents, organizations and/or businesses granted funding
- Communicate to applicants with acceptance / decline / appeals messages electronically
- Manage the administrative aspects of this project as it relates to achieving the stated outcomes:
 - Data entry
 - Creating and coordinating materials, filing documents, etc.
- Assist with managing the appeals process
- Assist Client with data points for public relations coverage on community efforts
- Assist with revisions/edits to website and communications pieces as needed
- Provide all documentation and reporting to City for public record/auditing purposes

The Agreement is for a period of one (1) year beginning December 1, 2021 and ending December 16, 2022 or until the funds are dispersed. There will be an initial flat fee of \$18,820 to build out the program. Sixty (60) days after the signing of the contract, the fee will be \$5,000 per month. The contract includes the review of up to 465 online submissions. Should the Client surpass 465 online submissions, the per application fee of will \$8.64. Should the Client need additional time, this contract shall continue on a month-to-month basis at \$5,000 per month until Client notifies SPI the program is completed. Invoices are due and payable upon presentation. Either party reserves the right to terminate this Agreement for any reason upon a thirty (30) day written notice.



While this Agreement is in effect, and at all time thereafter, Strategic Philanthropy, Inc. employees shall comply with any rules or direction made or given by Client with respect to the safeguarding or ensuring of the confidentiality of information, data, documents or materials acquired or by which access has been given in the course of or incidental to the performance of this Agreement.

All information, data, research, reports, documents, photographs and materials discovered or produced by Strategic Philanthropy, Inc. or any employees, in the performance of this Agreement, and all copyright therein, shall be the exclusive property of Client and shall be delivered without cost to the Client upon request. Strategic Philanthropy, Inc. reserves the right to retain copies of files that document its work efforts.

While this Agreement is in effect and at all times thereafter, Strategic Philanthropy, Inc. and any officers or employees shall not use, publish or disclose any information, data, research, reports, documents, photographs or materials discovered or produced by them in the performance of this Agreement without first obtaining written permission from the client.

Any equipment, materials and supplies provided by Client to Strategic Philanthropy, Inc. for use in the performance of this Agreement shall remain the property of Client and shall be returned without cost to Client upon request.

Strategic Philanthropy, Inc. represents a variety of organizations and potential clients and does not (1) guarantee fundraising for the Client; or (2) guarantee that any other clients or potential clients of Strategic Philanthropy, Inc. will provide funding to Client. During the term of this engagement, we agree that we will not accept representation of another client to pursue interests that are directly adverse to your interests unless and until we have made full disclosure to you of all the relevant facts, circumstances and implications of our undertaking the two representations and you have consented to our representation of the other client. You agree, however, that you will be reasonable in evaluating such circumstances and that you will give your consent if we can confirm to you in good faith that the following criteria are met: (i) there is no substantial relationship between any matter in which we are representing or have represented you and the matter for the other client; and (ii) our effective representation of you and the discharge of our professional responsibilities to you will not be prejudiced by our representation of the other client.

If you are in agreement, please sign below and return one signed original to me for my files. We look forward to working with you.

Sincerely,

Kelly Alvarez Vitale
President

Approved: _____
Signature

Kelly Alvarez Vitale
Printed Name

November 5, 2021
Date

Approved: _____
Signature

Printed Name

Date

Proposed Project Timeline

Goal: To create a strategic rollout of the *American Rescue Plan Act Funding*

- **Week 1 – 9** (**tentatively December 1, 2021 – January 31, 2022*)
 - Meet with Client team to review timeline
 - Conduct research to define and narrow criteria & guidelines
 - Solidify criteria and guideline requirements
 - Set up meeting with IT to learn about Client website capabilities
 - Meet with external website designer to discuss key goals for external community page on all three relief programs
 - Assist with establishing layout for external site
 - Discuss layout/building additional pages to communicate Client's grant efforts, guidelines, FAQ, etc.
 - Creation of text for external site
 - Work with IT/Marketing to finalize site
 - Assist with ensuring External site complete and approved
 - Assist Client with creating a rollout plan
 - Assist Client team with the marketing plan to rollout program utilizing advertising, direct mail, traditional and social media assets
 - Assist with establishing a communications plan for rollout and for events
 - Rollout plan approved
 - Work with Client's in-house assets to begin executing campaign/grant concept
 - Assist with devising budget
 - Assist with creating online application portal:
 - Eligibility quiz
 - Formal Application
 - Appeals Application
 - Test out application before launch/make any edits/revisions based feedback
 - Develop scoring rubric and process for data analysis
 - Assist with creating acceptance/decline emails to go out to community
 - Work with Client team to launch initiative
- **Week 10** (**tentatively February 7, 2022*)
 - ARAP Program Application Opens
- **Week 10 – Week 49** (**tentatively February 7, 2022 – November 30, 2022*)
 - Manage and implement the day-to-day initiatives determined by the rollout plan and timeline. This includes, but is not limited to:
 - Assist with answering requests via phone and/or email
 - Provide appropriate updates to Client
 - Oversee the day-to-day operations, which includes coordinating and managing programming related activities
 - Organize applications for residents and businesses
 - Saving the individual applications & the documentation required
 - Data to be organized and scored
 - Conduct due diligence on all documentation submitted:
 - Legitimacy of applicant
 - Applications meet the assistance program criteria/questions and meet Client's definition of assisting most vulnerable population; appropriate attachments are included and complete



- Coordinate report for Client team with applicant recommendations
- Communicate to applicants with acceptance / decline messages
- Manage the administrative aspects of this project as it relates to achieving the stated outcomes:
 - Crafting emails/communications for acceptance/declines & appeals
 - Data entry
 - Creating and coordinating materials, filing documents, etc.
- Manage the appeals process

- **Week 50 – Week 52** (**tentatively December 1 – December 15, 2022*)
 - Assist Client with data points for public relations coverage on community efforts
 - Assist with revisions/edits to website and communications pieces as needed
 - Provide all documentation and reporting to City for public record/auditing purposes