

DRAFT MEMORANDUM OF UNDERSTANDING

Family Planning Council of Iowa & Larned A. Waterman Iowa Nonprofit Resource Center

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Family Planning Council of Iowa

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July 21, 2023 DRAFT

Dear Board of Directors and Staff,

Greetings! Below is an update on our progress, a description of the documents herein, and next steps.

Update. As stated in our letter dated April 28, 2023, our intention was to get to know the people who make the Family Planning Council of Iowa (FPCI) possible. We were able to meet for one-on-one conversations with four of the seven board members, three staff members, and three leaders of subrecipient organizations for approximately five hours of meaningful and insightful dialogue. We have used this work to produce the documents described below.

Documents. The “Executive Summary” provides a brief set of six key observations and six recommendations based on our one-on-one conversations. It is followed by our proposed “Memorandum of Understanding” that will guide our work together over the next several weeks and months if we choose to move forward. This includes a Work Plan with activities, assignments, and due dates.

Next Steps. We sent a draft of this document to Adam Stark and Allison Smith, as they are serving as our early liaisons to the board and staff. We have worked with them to make edits and/or additions to the MOU. If the board and/or staff members have any questions—including additions or edits—just let us know. Once accepted, we will follow the Work Plan in the MOU, which includes activities, assignments, and general due dates.

I do want to stress that the “Executive Summary” here is not meant to be comprehensive. It was our best effort to distill hours of conversations into key focus areas. If additional key focus areas arise during this process, we are nimble enough to add and address them. The production of these documents was the next step towards building the trust and understanding necessary for us to assist your organization with its valuable work.

Sincerely,

Paul Thelen, JD | Director
paul-thelen@uiowa.edu | 319-335-7094

EXECUTIVE SUMMARY

Purpose: The purpose of our work together is for the Larned A. Waterman Iowa Nonprofit Resource Center at the University of Iowa (INRC) to assist the Family Planning Council of Iowa (FPCI) in its strategic planning process, as well as opportunities for board capacity building. Strategy is not only about goals, objective, and activities, but it also involves considering how the organization is structured to make decisions and produce outcomes. Board capacity building focuses on developing the knowledge, skills, This Executive Summary condenses our copious notes into five key observations and five recommendations.

Strategy: At the INRC, we think the surest way to build understanding and trust with an organization is to get to know its people. To adapt a phrase, “Relationships move at the speed of trust; progress is built on the strength of relationships.” Rather than a survey or full board meeting, we find one-on-one conversations help us understand organizations and how they operate.

Participants: Four out of seven board members and three staff members completed one-on-one conversations, as well as three leaders of subrecipient organizations—including Brandi Steck from Siouxland Community Health Center, Cherry Klein from Great River Health, and Heather Montgomery from Women’s Health & Family Services. INRC participants include summer research associates, as well as the INRC director.

FPCI Mission: Your Wellbeing. The purpose of the Family Planning Council of Iowa (FPCI) is to provide quality reproductive health care and family planning services to all people in Iowa who desire it. We provide this care through the delegation of Title X (ten) funds from the federal government, subcontracting with delegate agencies to provide family planning services to low-income individuals in local communities. FPCI additionally provides services and programming available to nurses, students, and the public.

FPCI Vision: Responsible Sexual Health For All. We envision an Iowa where sexual health results from responsible decision-making and access to care for all who seek it. FPCI is committed to seeing this through in all of our efforts.

INRC Experience & Research: At the INRC, our consultants bring over three decades of experience working with and advising nonprofit organizations of all sizes and missions. We have extensive experience in capacity building, strategic planning, succession planning, and overall organizational governance and structure. In the summer, we recruit an outstanding cohort of advanced undergraduate and graduate students to our Summer Research Associate Program. This builds our capacity during the summer months to deliver products and services.

Six Key Observations

Key Observation 1: Overall positive view of the organization by internal and external stakeholders. Participants shared positive views on their service and/or work with FPCI. There was agreement that FPCI plays a crucial role in the health and well-being of lowans. This includes FPCI's role in delegating Title X funds to frontline subrecipients, as well as collaborating on programs like the free reproductive health kits for lowans. Efforts to build positive community climates for family planning, supporting health education competence, promoting healthy sexual relationships, and beyond were also seen as vital.

Key Observation 2: There is a strong desire to do more to advance FPCI's mission and vision. Members of the board and staff expressed interest in exploring opportunities to increase FPCI's impact on the health and well-being of lowans. This included ideas around additional fundraising, advocacy, education, and collaboration. The subrecipients shared that additional resources would make it more possible for them to deliver programs and services—such as free cervical cancer screenings—not funded by Title X but still vital to serving the needs of lowans. While there was strong desire to explore these opportunities, there was also some trepidation in raising the public profile of FPCI.

Key Observation 3: FPCI's current organizational structure and individual role descriptions may need to be adapted for future success. Turnover at both the board and executive staff levels—as well as reimagining of FPCI's work going forward—offers an opportunity to revisit how the organization operates. In the past, the long-serving executive director performed most of the work, including the mission-related work and mission-supporting work such as board recruitment. The board of twenty or so members did serve on committees, but board member activity was seen as mostly passive. Turnover at the executive director position has led to greater executive committee and board engagement. Now, after another turnover in the executive director position—and a whittling of board members below ten—there is an interest in structuring FPCI to best serve its purpose.

Key Observation 4: Administrative requirements for funding can be onerous. Both staff and subrecipients acknowledge that the process of receiving funds, delegating funds to clinics, registering individuals for service, and delivering required reports are burdensome. Clinic coordinators spend significant hours on filling out paperwork, especially in the past when the organization was run through actual paper. Though there has been improvement, there are still challenges with logistics, notetaking, and legal requirements. This includes e-SPAR requirements, annual audits, and other reporting needs that limit the services medical providers can offer. Participants acknowledged it will take resources to streamline this system.

Key Observation 5: Turnover of board members and executive leadership has been exhausting at times but offers an opportunity for rejuvenation. Everyone acknowledges the transitional period of the organization, but everyone is also hopeful and optimistic for changes and growth moving forward. Recruiting board members with key knowledge, skill, and experience was seen as a priority, as well as building the capacity of current board and staff.

Key Observation 6: A challenging state and national climate. Recent state and federal judicial opinions—as well as recent state legislation—have placed reproductive rights and reproductive health at the center of local, state, and national debates. Some participants expressed that FPCI needs to play a lead role in helping shape public opinion and public policy; others are not so sure.

Six Recommendations

Recommendation 1: Reenergize board, staff, and subrecipients. These last few years have been challenging both internally and externally for FPCI. Oftentimes, consultants will want to jump quickly into identifying and addressing issues and facilitating plans to move the organization forward. While this is no doubt important, our first recommendation is to care for the board, staff, and subrecipients who have made the work of FPCI possible. People are FPCI's most valuable asset. We would recommend starting our work by focusing on FPCI's people. This will make pursuing our following recommendations more possible.

Recommendation 2: (Re)commit to outcomes FPCI most wants to (co)produce. Outcomes like reducing unintended pregnancies and ensuring reproductive health are central to FPCI's mission and vision. There were several other areas participants raised as potential outcome areas—from additional sexual health outcomes to tangential outcomes in areas related to marginalized communities and those with housing or food insecurity. For some outcomes, it may mean collaborating with other entities to produce meaningful impact. At the heart of this recommendation is a commitment to the purpose of FPCI moving forward.

Recommendation 3: Reimagine and rebuild the staff and board structure. A common phrase we use is that “structure must be in service of purpose.” The staff and board structure are key tools towards fulfilling FPCI's mission. To do so, we must clarify the individual roles of members of the board and staff, to prepare for the subsequent work of recruiting individuals to these roles based upon their knowledge, skills, and experience. For current staff and board members, this may mean capacity building at the individual, organizational, and even inter-organizational levels. For example, is fundraising going to be a strategy for supporting programs and services? If so, how do we build FPCI's capacity to successfully fundraise? There is also opportunity for creativity here in terms of board structure—such as an advocacy advisory board. Finally, outcomes are also relevant here, but instead of “mission-related outcomes,” we would identify these as “mission-supporting outcomes.”

Recommendation 4: Commit to a well-considered advocacy strategy. FPCI must be intentional if it pursues a more public role for itself, and it must have clear outcomes it is looking to produce or co-produce as part of this role. Given the current climate in the state and across the United States, raising the public profile of FPCI does not come without potential risks and rewards. Research into peer entities in similar environments may prove instructive.

Recommendation 5: Let FPCI be a great supporter and follower of others. Oftentimes, organizations focus on their role as leaders regarding certain services, issues, etc. While this is important, actively and enthusiastically supporting individuals and organizations that align with FPCI's purpose can also help generate key mission-related and mission-supporting outcomes.

Recommendation 6: Explore and experiment additional collaborations with potential partners. This recommendation builds directly off the preceding recommendation. The key is that this work also takes time and additional resources, as FPCI understands from its current partnerships. The benefit is that by working with aligned individuals and/or entities, there is the potential for producing even greater impact across a multitude of key areas. Further, there is a continuum of collaboration that may start with sharing a project or program to more involved activities that may lead to greater integration.

MEMORANDUM OF UNDERSTANDING

This Memorandum of Understanding (MOU) is made between **Family Planning Council of Iowa (FPCI) 108** – Third Street, Suite 220 Des Moines, Iowa, and the **Larned A. Waterman Iowa Nonprofit Resource Center (INRC)** at the University of Iowa located at 1 West Prentiss Street, Iowa City, Iowa.

I. **PROJECT.** This project focuses on delivering a combination of products and activities to help build and strengthen FPCI’s strategic performance.

II. WORK PLAN.

WORK PLAN		
Completion Date	Activity	Responsible Party – Tasks
End of June 2023	<ul style="list-style-type: none"> • ONE-ON-ONE CONVERSATIONS 	<ul style="list-style-type: none"> • BOARD, STAFF, INRC– We will have one-on-one sessions with current board members and lead staff. The purpose is threefold: establish trust; learn about each individual’s experience; and understand desired outcomes for this strategic planning process.
End of July 2023	<ul style="list-style-type: none"> • INRC EXECUTIVE SUMMARY • FPCI – COMMITTEE (FPCIC) • SCHEDULE & MEETINGS 	<ul style="list-style-type: none"> • INRC – Draft a brief executive summary that will capture major takeaways and offer a path forward for our capacity building and strategic planning work. • BOARD & STAFF – Identify a small and energetic group of board and staff members to lead the capacity building and/or strategic planning process (FPCIC). While all board and staff members may be involved at different times—as well as additional stakeholders—this committee is responsible for moving this work forward. This committee might also include members who are neither board nor staff. • INRC – We are responsible for working with the FPCIC to produce the desired board development and strategic planning outcomes. This will likely require coordinating work—including scheduling and facilitating meetings. We only meet as necessary to do work that cannot be best done asynchronously.
Mid-August 2023	<ul style="list-style-type: none"> • CURRENT RESOURCES 	<ul style="list-style-type: none"> • FPCIC – Gathers and organizes current existing resources that may assist with board development and/or strategic planning. This could be in the form of policies/procedures, role descriptions, organizational chart, data and/or reports related to FPCI programs, services, etc.
Mid-End August 2023	<ul style="list-style-type: none"> • REENERGIZE BOARD, STAFF, 	<ul style="list-style-type: none"> • FPCIC & INRC – Produce an event designed to recognize the valuable work contributed by internal

WORK PLAN		
Completion Date	Activity	Responsible Party – Tasks
	SUBRECIPIENTS & ADDITIONAL STAKEHOLDERS	and external stakeholders and reinvigorate the people in these roles to do the work necessary to move FPCI forward.
End of August 2023	<ul style="list-style-type: none"> NEW RESOURCES PEER RESEARCH 	<ul style="list-style-type: none"> FPCIC, INRC – Identify and develop new resources to gather/produce data that would be helpful with strategic decision-making. New resources may include the following: Board Survey, Board Matrix, Subrecipient Survey, etc. FPCIC – Identify peer entities. These may include similar entities in other states, as well as entities in Iowa doing work that aligns with FPCI's purpose. INRC – Conducts research of peer entities in areas including structure, strategy, development, and beyond.
End of August 2023	<ul style="list-style-type: none"> STAKEHOLDER ENGAGEMENT SURVEYS 	<ul style="list-style-type: none"> FPCIC, INRC – Strategize meaningful engagement(s) with key stakeholders in the strategic planning process. This may include former board/staff, donors, community leaders, peers, etc. FPCIC, INRC – Hold in-person and online sessions with key outside stakeholders. Distribute and analyze surveys.
End of September 2023	<ul style="list-style-type: none"> MISSION, VISION, VALUES, & GOALS CONTINUE STAKEHOLDER ENGAGEMENT 	<ul style="list-style-type: none"> FPCIC – Revisits mission, vision, values, and goals from previous plan. Highlight new areas where FPCI is focused on producing meaningful outcomes. INRC – Offers examples and templates, as well as facilitates the drafting of these elements and additional document development. Assists in engaging internal and external stakeholders to generate and contemplate updates to these areas. FPCIC, INRC – Continue meaningful stakeholder engagement during this process.
End of September 2023	<ul style="list-style-type: none"> BOARD RECRUITMENT 	<ul style="list-style-type: none"> FPCIC & INRC – Based on the Board Matrix, begin to identify individuals FPCI may recruit to the board.
End of October 2023	<ul style="list-style-type: none"> BOARD & STAFF WORKSHOP / RETREAT CONTINUE STAKEHOLDER ENGAGEMENT 	<ul style="list-style-type: none"> FPCIC – Prepares board and staff to meaningfully participate in a workshop/retreat designed to make decisions on a strategic path forward. INRC – Facilitates workshop to bring together board and staff to adapt and adopt a new strategic plan. FPCIC, INRC – Identify Key Performance Indicators (KPIs) relevant to outcomes/objectives associated with each goal. Continue meaningful stakeholder engagement during this process.

WORK PLAN		
Completion Date	Activity	Responsible Party – Tasks
Beginning of December 2023	<ul style="list-style-type: none"> LAUNCH STRATEGIC PLAN 	<ul style="list-style-type: none"> FPCIC, INRC – Develop work plans to launch new strategic plan. These will include responsible parties, KPIs, due dates, relevant tactics, resources, etc.
TBD	<ul style="list-style-type: none"> BOARD WORKSHOPS 	<ul style="list-style-type: none"> INRC – Develop and facilitate workshops designed to build individual, group, organizational, and/or interorganizational capacities. This could include workshops on governance, strategy, succession planning, fundraising, collaboration, advocacy, and beyond.
TBD	<ul style="list-style-type: none"> STRATEGIC PLANNING REVIEW 	<ul style="list-style-type: none"> FPCIC, INRC – Measure KPIs against actual results. Make adjustments as necessary.

- III. TIME FRAME.** FPCI and INRC will work together over the next several weeks and months towards a goal of meeting the due dates above. Some items—such as coaching—may span several months.
- IV. CONFIDENTIALITY.** Neither INRC nor FPCI will disclose or use, without the prior written permission of the other party, any proprietary or confidential information except to the extent necessary to perform the services described herein.
- V. INRC INTELLECTUAL PROPERTY and WORK PRODUCT.** INRC owns and retains its intellectual property, including all copyrights, trademarks, and other property rights therein. The work product produced under this MOU—including the mission, vision, values, strategic plan, and similar items—are the property of the FPCI.
- VI. RELATIONSHIP.** INRC is independent of FPCI. INRC has the right to perform services for others during the term of this MOU. INRC has the sole right to control the direct means, manner, and method by which the services of this MOU will be performed. The FPCI will not withhold FICA, not make state nor federal unemployment compensation contributions, and not withhold state nor federal income tax for the INRC.
- VII. PAYMENT.** INRC would normally offer the services described herein for a flat fee of \$5,000. Unless FPCI is successful in securing a capacity-building grant or similar funds to cover this amount, we are happy to offer these services for a flat fee of \$2,000. INRC benefits from our engagement with FPCI, as INRC seeks opportunities across Iowa that are mutually beneficial with the organizations that serve our state. Payment is due 60 days after the Board/Staff Workshop/Retreat, so long as further progress is being made toward the launch of the strategic plan.
- VIII. EXPENSES.** INRC is responsible for all expenses in performance of its roles and responsibilities except for travel. Travel costs (federal mileage rate) will apply for any travel outside of the Iowa City area. Travel will only occur with the prior written permission of FPCI.

SIGNATURES

Printed Name, Title

Signature

Date

Family Planning Council of Iowa

Printed Name, Title

Signature

Date

Larned A. Waterman
Iowa Nonprofit Resource Center