



PROPOSAL (Draft 03/09/18)

**MILWAUKEE METROPOLITAN ASSOCIATION OF COMMERCE (MMAC)
MAKING DIVERSITY AN ASSET**

- A. **FIRM NAME:** P3 Development Group, LLC
- B. **CONTACT PERSON:** Genyne L. Edwards, JD
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- D. **QUALIFICATIONS and APPROACH:**

P3 Development Group has significant experience in conducting qualitative research and analysis with a specific focus on inclusion. We partner with clients to identify a process that provides a rich, detailed snapshot of the project target audience and insights to inform strategic next steps. In addition to our background in diversity, inclusion and community development, we are a team of planners, legal experts and research specialists with experience in qualitative and quantitative research. We utilize our team of subject-matter and content experts to execute an approach and process that results in broad-based strategies that support our clients' needs and next steps.

While the methodology and the outcomes of much of our work vary, several core values provide a foundation for the P3 approach. First and foremost is respect for the client's goals. Our work begins with establishing collaborative relationships and building trust that not only leads to successful completion of the project, but often results in the building of an effective partnership amongst those who participate in the process, including the implementation of any recommendations.

Our team has a thorough understanding of the MMAC's strategic vision for making diversity an asset. Additionally, as an organization, we are aligned with MMAC's mission and values. We have strategic alliances and partnerships with local community-based organizations and cross sector inclusion initiatives (i.e. African American Leadership Program, African American Leadership Alliance, MKE United, Imagine MKE, etc.) that are developing and employing inclusion strategies that align with MMAC's goals. These relationships will assist us in quickly identifying points of alignment to implement high leverage strategies.



E. PROJECT SCOPE OVERVIEW

The P3 team consists of locally-based professional consultants with relevant experience and skill sets that uniquely position our firm to conduct comprehensive research projects with expert analysis. We will engage this project by utilizing a small, highly qualified team with significant experience in all aspects of data collection, including qualitative and quantitative research and analysis. Our research team is comprised of researchers who will identify the relevant data to assess and synthesize insights into actionable recommendations.

P3 will engage in a qualitative research study which will incorporate several methodological steps to fulfill its objectives and prepare for additional quantitative research in the future. Our research preparation, data collection and analysis process will include but is not limited to the project scope activities included within this proposal.

1. Confirm Research Objectives via Client Engaged Discovery & Knowledge Scan

The P3 team will begin its process by working with MMAC lead staff to clarify the project objectives and co-develop the final methodology and project outcomes. In particular, this task will help identify key project stakeholders and confirm the communication protocol with the project lead(s).

2. Confirm Final Research Methodology

The above referenced *discovery and knowledge scan process* will inform which methodologies best meet the project research objectives. We envision facilitating an initial meeting where key project stakeholders will work collaboratively to design the strategic approach, define study parameters and refine recruitment approaches and research participant incentives.

3. Develop Research Tools & Conduct Research

The following are P3's proposed methodologies, which would be further discussed and confirmed in Step 2 above.

a. Qualitative Research – Key Informant Interviews & Focus Groups

P3 will develop interview protocols that will cover topics that align with the primary project goals and objectives.



We recommend conducting **35 - 40 key informant interviews** across the 25 companies identified for participation in the research project. The key informants selected should be categorized individually by race, age and position within their organizations.

The purpose of the key informant interviews will be to identify perceived and actual systemic barriers and practices that would prevent sponsorship and successful recruitment, retention and/or promotion of minorities in management positions.

Additionally, and specifically from African-American, key informants, the purpose of the interviews is the identification of perceived and actual barriers to advancement and the impact of those barriers on their ability to effectively navigate specific corporate cultures and successfully identify and pursue paths to advancement. Additionally, this interview group will need to uncover insights about how engagement and connection to the broader community impacts retention and advancement.

Although the same base protocol will be used for all interviews, each segment interview will be customized to focus on culture and position and roles within interviewees organizations.

P3 will work with the MMAC to implement participant engagement strategies to identify, screen and recruit participants in the target audience. We may also recruit individuals who have participated in both the African American Leadership Program and African American Leadership Alliance to participate in the study.

Final interview inputs will be transcribed, formatted, coded and analyzed.

In addition to key informant interviews, P3 will facilitate approximately **6-8 focus groups** with 20% + of the target groups described above. The results of the key informant interviews will be used to fashion questions for focus groups. Like with the key informant interviews, we will want to ensure that we are using as large of a sample as possible. Based on current assumptions, two of the 6-8 focus groups, will need to include human resources and supply chain professionals within the organizations identified to participate within the research study.

b. Quantitative Research – Survey

Following the qualitative research activities, a survey may also be created and deployed to a significant number of employees within each of the organizations to obtain further information and test assumptions and theories identified during the qualitative research phase. If this approach is selected, P3 will formulate survey questions that are informed by the qualitative research findings, incorporate logic, build, test and deploy the survey. P3 will also format, code, analyze and report on survey findings.



4. Develop Final Deliverable(s)

P3 will provide a comprehensive, professional final data driven deliverable that documents the overall data collection and analysis process.

The final deliverable will include a written report with interview findings. This may include an executive summary, background and methodology, number of research participants, potential limitations of the data provided, implications of the research and high level, actionable recommendations for implementation in a final report. P3 is open to discussing which format the final deliverable should be presented (i.e. narrative and/or presentation slide deck). In addition, if appropriate, P3 would develop a scope of work to support the development of a diversity program or intervention.

F. ANTICIPATED TIME NEEDED TO COMPLETE THE PROJECT

6 mos

P3 anticipates approximately a 6-month period of time will be necessary to successfully completed this project. As such, the completion date will be determined by the project start date.

G. SUMMARY OF EXPERIENCE / FIRM CAPABILITIES

The P3 team brings a wealth of experience that includes many types of qualitative research projects. The team has more than three decades of work with corporations, community development and other nonprofit organizations, local and state government and foundations. P3's related experience in representative projects is detailed in the table below.

| PROJECT TITLE | PROJECT DESCRIPTION |
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| <i>Northwestern Mutual STEM Environmental Scan and Program Development Project</i> | P3 conducted an environmental scan of local and regional STEM programs, organizations and initiatives within Milwaukee (and surrounding communities) to assist Northwestern Mutual identifying the gaps and opportunities in the current landscape. P3 utilized the information gathered during the scan to assist Northwestern Mutual in developing a STEM outreach strategy and program, which included metrics and a roadmap and timeline for achieving strategy goals. |



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| <p><i>Froedtert Health & the Medical College of Wisconsin Clinical Cancer Center Qualitative Research Project</i></p> | <p>P3 planned, designed, facilitated a series of focus groups for Froedtert & the Medical College of Wisconsin Clinical Cancer Center (MCW). The goal of facilitating the focus group is to identify opportunities, provide strategic recommendations, and develop an action plan for enhanced culturally competent care.</p> |
| <p><i>Blood Center of Wisconsin Qualitative Research Project</i></p> | <p>P3 planned, designed, facilitated a series of focus groups for the BloodCenter of Wisconsin. The goal of the project was to identify opportunities, provide strategic recommendations to develop culturally competent strategies to increase donations from a specific demographic.</p> |
| <p><i>Milwaukee County Parks Wisconsin Qualitative Research Project</i></p> | <p>P3 designed and facilitated of focus groups, key leadership interviews, public forums and workshops for the Milwaukee County Parks to support the development of the Milwaukee County Park Recreation Master Plan.</p> |
| <p><i>Milwaukee Area Workforce Investment Board Qualitative Research and Evaluation Project</i></p> | <p>Completed qualitative research and an evaluation of the Health Profession Opportunity Grants (HPOG) Program that established by the Affordable Care Act of 2010 (ACA) to provide training programs in high-demand health care professions to recipients of Temporary Assistance for Needy Families (TANF) and other low-income individuals in the Milwaukee area. Worked with grantees including: post-secondary educational institutions, workforce investment boards (WIBs), state and local government agencies, and non-profit organizations to gather qualitative and quantitative data about the program's successes and challenges.</p> |
| <p><i>United Way of Greater Milwaukee – Black Boys and Men Environmental Scan</i></p> | <p>Conducted an environmental scan to identify the programs and initiatives geared towards black boys and men in Milwaukee. The scan supported United Way goal of assessing the social service sector's readiness to explore a collective impact strategy around the work affecting black boys and men in Milwaukee.</p> |
| <p><i>United Way of Greater Milwaukee – A Look at Policies Impacting Local Boys and Men of Color</i></p> | <p>Conducted a review and analysis of the policies impacting local boys and men of color. Project included a series of key informant interviews. The analysis supported United Way in further developing a plan to support the work being lifted to impact positive outcomes for boys and men of color in Milwaukee.</p> |



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| <p><i>Boys & Girls Clubs of Greater Milwaukee – Proposed Future Orientation of Graduation Plus Programming</i></p> | <p>Developed and facilitated a qualitative research process that allowed the BGCGM to interview college access and success leaders and identified best practices in the field to determine innovative and evidence-based approaches to college access and success programs both locally and nationally. Information gathered was used to facilitate discussions with BGCGM staff to identify specific programmatic opportunities, enhancements and develop a roadmap for the newly designed BGCGM college access and success program.</p> |
| <p><i>City of Milwaukee Small Business Enterprise Evaluation of Inclusion Efforts</i></p> | <p>Provided holistic review of the current practices of the City of Milwaukee’s inclusion programs including the Office of Small Business Development Certification Program, Resident Participation Program (RPP) and the inclusion goals and practices for the Housing Authority of the City of Milwaukee (and the Redevelopment Authority of the City of Milwaukee. Interviewing internal and external stakeholders, reviewing the legal framework informing the City’s inclusion activities, identifying national best practices based on a peer cities review and recommending programmatic and process improvements to assist the City of Milwaukee in better achieving its overall inclusion goals.</p> |

P3 utilizes a cadre of consultants with specialized expertise and a common commitment to excellent outcomes.

We regularly work in collaboration with individuals and consulting firms. We have a deep appreciation for the value of working in project teams that combine the talents of sub-consultants and organizational partners to deliver success.

On this project, we will partner with an experienced local diversity and inclusion strategist, on an as needed basis.



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H. COST PROPOSAL

P3's services will be performed at a blended consultant team rate of \$200/hour.

We estimate the total project cost to range from \$65,000 – \$68,000, based on our preliminary understanding of the scope of work and P3's proposed approach and deliverables outlined above.

The cost estimate does not include related project expenses. The expenses will be projected based on assumptions and the greatest flexibility needed to successfully deliver the project on time. Out-of-pocket expenses included in the budget, including, but not limited to meeting facilities/amenities for planning meetings and travel outside of the Milwaukee metropolitan area if any, will be billed at cost incurred. All expenses will be submitted with receipts for reimbursement.

Interviews in the Milwaukee metro market will be conducted in-person.

P3 does not bill for mileage within the Milwaukee region, administrative work, telephone or fax. Expenses, if incurred, will be listed on the invoice with detailed receipts.