

South Madison Reinvestment and Equity Study – 2022

Attachment 1 - Scope of Services

I. Project Description and Goals: This contract sets forth the scope of services for an evaluation study to be called the Census to Census (CtC) project, a ten (10) year, in depth evaluation of the impact of the City’s innovative investment strategy to support racial equity and inclusion and increased economic and overall well-being for current residents of the area as shown in the attached Appendix (“South Madison”). The primary goal of this evaluation is to understand the effect that these investments made using tax increment financing (TIF) (“TIF Investment Strategy”) have on the current residents, and to then apply this information to other similar investment strategies throughout the City. To that end, the City is contracting with UW PHI for services related to project management, stakeholder engagement, data gathering and collection, surveying, analysis and reporting on the impacts of these investment efforts.

The study design is a community-engaged action evaluation design which is designed to balance the needs and priorities of all stakeholders including, but not limited to the City and the residents of South Madison. This approach to evaluation requires meaningful relationship development and an in-depth understanding of the history of the relationship between the City of Madison and the residents of South Madison. Accordingly, the deliverables of this year of this contract focus on collaboratively developing and implementing culturally responsive and culturally appropriate data collection on markers of resident well-being. The exact variables, tools, and approaches to data collection that meet the needs of the City’s goals to monitor financial, social and physical wellbeing will be collaboratively identified with the engaged residents of South Madison during this year of the study.

This Contract and Scope of Services covers approximately (1) year of services for the term described in section 4 of the Contract for Purchase of Services. During the term of this Contract, UW PHI shall perform the tasks and deliver to the City the services listed in Section II.

II. Year 2 Timeline, Services and Deliverables (this Contract):

• CARRY OVER FROM YEAR ONE CONTRACT:

- Develop baseline data collection strategy and finalize tools;
- Prepare neighborhood ambassadors for data collection
- UW PHI will engage, hire and supervise Neighborhood Ambassadors to conduct outreach and data collection.
 - UW PHI will be responsible for oversight, pay, and management of the Neighborhood Ambassadors. These Neighborhood Ambassadors will be responsible for meeting with residents, learning about their concerns, informing them about the process and how they can get involved, providing feedback on data collection tools and protocol and conducting data collection and dissemination. If desired, Neighborhood Ambassadors will be invited to participate in data analysis.
- UW PHI will collaboratively develop a culturally responsive and appropriate evaluation plan to assess the impacts of the Tax Increment Financing (TIF) investment strategy on the financial, social and physical well-being of the residents of South Madison, in conjunction with South Madison residents and City of Madison staff.

- UW PHI will provide annual written updates to the City of Madison and the residents of South Madison on the progress of the study development and implementation.

January 1, 2022- April 2022: Hire neighborhood ambassadors for data collection/community organizing; develop baseline data collection strategy and finalize collection tools; prepare neighborhood ambassadors for data collection; continue meeting with stakeholders from the City and the mayor's office and the south side; provide quarterly progress report to City; (40% FTE) (Progress reports shall include: Neighborhood Ambassadors' status; Data collected to date; Number of participants enrolled in the study; Other data or updates pertinent to the City's long-term goal of maximizing the benefit to South Madison residents)

April-October 2022: Manage baseline primary data collection; assist with recruiting Community Advisory Board ; prepare progress reports and baseline data reports for various stakeholders.

November-December 2022: Disseminate findings to community stakeholders; prepare for year 2 data collection

The overall Deliverables during the lifetime of the study are defined as:

III. Anticipated Deliverables starting in Year 2, plus Year 2 Timeline.

The specific services and required deliverables over the lifetime of the study (anticipated to be 10 years) are described below.

- UW PHI shall provide project management, and conduct a developmental evaluation that provides ongoing resident feedback to the city regarding TIF-funded development efforts in south Madison.
- UW PHI shall provide analysis of demographic changes in the study area pulled from the American Community Survey.
- In collaboration with South Madison stakeholders, UWPHI will hire data-collectors and canvass the study area, conducting door-to-door surveys with residents in exchange of monetary incentives. While canvassing the data collectors will share updates on South Madison Plan implementation and share opportunities for residents to provide input on implementation activities. Data collectors will invite residents to enroll in a longitudinal study of the impacts of City-led development efforts in South Madison over the course of the study. Pending the outcomes of community engagement, the study may include some or all of the following information on each household
 - Age of participant representing the household/head of household
 - Race and Ethnicity
 - Tenure in South Madison
 - Income level
 - Occupation
 - Property ownership status (renter, owner, living with friends / family, etc.)
 - Educational attainment (for all participating adults)
 - Overall financial well being , including retirement savings, equity in property, pensions, stocks, etc.

- Income and wealth change over time for the aggregate of all households, as well as tracking each individual household's change over time
 - Financial duress/strain
 - Displacement pressures
 - Awareness of TIF-funded programs for wealth building and affordable housing
 - Barriers & facilitators of engagement with TIF-funded programs for wealth building and affordable housing
- UW PHI will provide ongoing analysis regarding displacement and gentrification within South Madison, as identified in the City of Madison's gentrification research.
 - The City wishes to intervene and understand its ability to stem the tide of displacement and gentrification that is occurring in South Madison.
- UW PHI will provide a yearly update provided to the City of Madison that provides details to the findings of the ongoing study. In particular, the City wishes to understand whether the well-being of the residents of South Madison is improving, by reviewing these findings on an annual basis. The exact definition and measurement of wellbeing will be decided in collaboration with the community members who engage with the study and to the satisfaction of the City. UW PHI shall provide a detailed analysis of these findings to the City, along with any recommendations that UW PHI believes will enhance and improve the City's ability to positively impact the lives of residents of South Madison.
- UW PHI will provide suggestions of policy and / or program changes or improvements that could improve or enhance the impact of the City's investment into South Madison on South Madison residents.

*The Parties anticipate executing a potentially revised Scope of Work and Deliverables in future years, as necessary.