

Coordinating Disaster **Recovery**

Connecting lowans to the
Resources They Need.

RFP-185-2517-2025

October 14, 2025

Prepared By:

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New York, NY 10007



Section 1 - Transmittal Letter

Dear Iowa Department of Administrative Services and Department of Homeland Security and Emergency Management,

Iowa communities have faced historic floods, derechos, and severe storms. When emergencies hit, residents need help that is fast, coordinated, and transparent. Unite Us stands ready to support Iowa communities in times of crisis. Our coordinated disaster-response network connects residents to critical resources and services when they're needed most. Whether responding to extreme heat or preparing for less common hazards, we help ensure Iowans can access timely assistance, strengthen community resilience, and recover together.

Our mission is to provide Iowa with the tools and infrastructure to deliver that kind of response under the Disaster Case Advocacy Program (DCAP) and the Iowa Individual Assistance Grant Program (IIAGP)—so case advocates, local EMAs, VOAD partners, and community organizations can work from a shared playbook, reduce hand-offs, and track outcomes clearly. In short: faster help for households, clearer visibility for the State, and a stronger, more connected recovery for Iowa.

In doing so, Unite Us affirms that we have read, understand, and agree to all terms and conditions of the solicitation, including all addenda and attachments, and confirm our full understanding of the Scope of Work and the nature of the goods and services being solicited. We are fully prepared to comply with the specifications and requirements of this solicitation, including data security, reporting, program performance, and all contract deliverables. Our team will coordinate closely with HSEM and participating counties to implement the platform, train advocates, and establish workflows that align with program requirements and timelines.

Our Proposed Solution For DCAP and IIAGP:

Statewide Referral Platform - One system already connecting **930+** Iowa programs, ensuring partners can coordinate and track every referral.

- **Resident Assistance Request Forms** - Easy online intake for residents to directly request support and be matched quickly with advocates.
- **Real-time Dashboards** - Transparent reporting and insights for case managers, counties and the state
- **Payments Tools** - Direct accountable distribution of funds to the right providers
- **Training and Support** - Blue skies readiness, with workflows established, and dedicated support team in place before an emergency hits.

Unite Us is already embedded in Iowa communities, with local partners actively collaborating on our platform. This established infrastructure allows for quick and seamless activation of disaster relief programs when emergencies occur.

Proven Disaster Response Experience:

- **Hurricane Ian (2022):** 18,000 Florida residents supported within 24 hours.
Hurricane Idalia (2023): More than 3,000 residents connected to urgent services.
- **Oregon (2024):** Rapid deployment of customized workflows, assistance request forms, supporting 4,000+ residents within hours.

We're committed to being a dependable partner to Iowa and its residents, building resilience and creating a safer, stronger community. Unite Us fully understands and accepts all solicitation requirements, including terms, data security, reporting, and deliverables.

Thank you for considering our proposal. We welcome the opportunity to support Iowa in implementing DCAP and IIAGP, ensuring that when emergencies happen, help is delivered quickly and effectively.

Sincerely,

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Section 3: Scope of Work

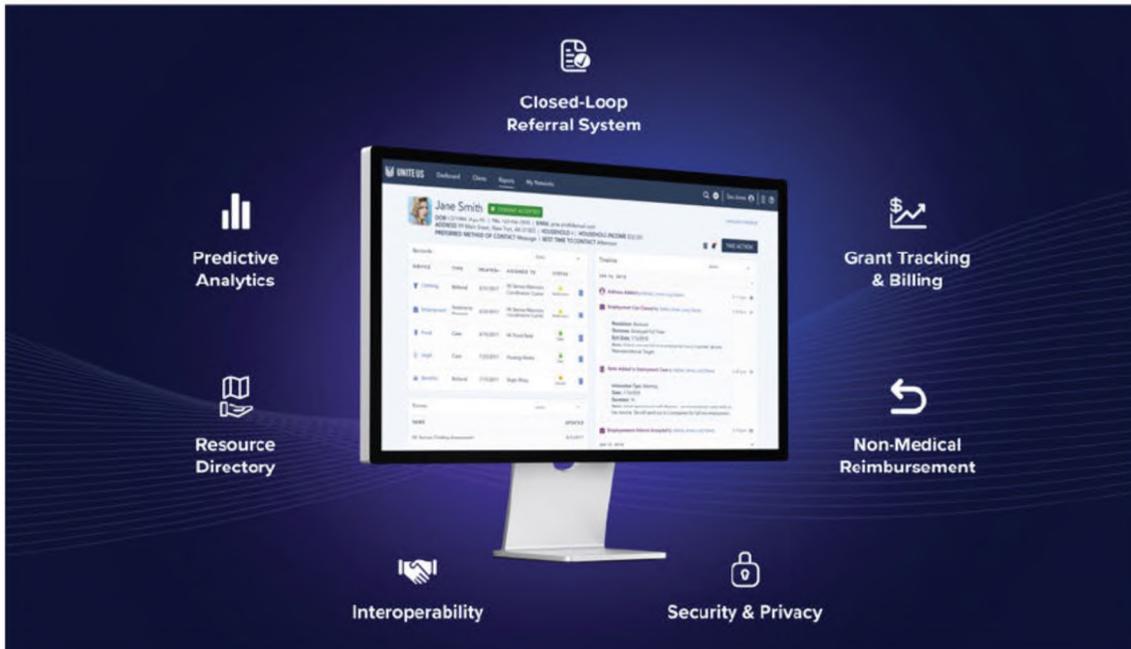
The Respondent will address each component of the Scope of Work by first restating the component followed by details of the Respondent’s planned approach immediately following the restated text. Proposal responses should provide sufficient detail so the Agency can understand and evaluate the Respondent’s approach. The Respondent represents and warrants that the proposed solution will remain available and viable for not less than ten (10) years from the date of Proposal and that the proposed solution will not be retired or discontinued before the expiration of such two (2) year window.

This Section lists the scope related to this solicitation. By submitting a proposal, the Respondent agrees to meet all stated scope in this section and any other terms and conditions stated in this solicitation. Items in this section will be considered in the evaluation and scoring of the Respondent’s technical proposal.

2.1. Detailed Scope of Work

2.1.1.1. Vendor will provide a Solution that allows the Agency to both oversee disaster case management and administer disaster aid grants.

Unite Us provides a single cloud-based solution for the Agency to oversee disaster case management and administer disaster aid grants. The platform combines case management, closed-loop referrals, and payments administration in one system. Case advocates can create and manage household recovery plans, while the integrated payments feature tracks **reimbursement requests, funds awarded, and funds expended**, giving the Agency a unified view of both case advocacy and disaster grant distribution in a single solution.



Unite Us Product Suite

Unite Us affirms that the proposed solution will remain available, supported, and viable for a period of not less than ten (10) years from the date of proposal submission. Unite Us further represents and warrants that the proposed solution will not be retired, discontinued, or otherwise rendered inoperable within that period. **Yes, Unite Us has fully implemented a case management system for a government entity in the last five (5) years.**

1. The Solution will provide for intake for every case through a single point of entry.

The **Assistance Request Form (ARF)** serves as the single entry point for households to request assistance. A household completes the form online as intake, which **automatically generates an electronic case file in Unite Us' Closed-Loop Referral Platform serving as your Disaster Case Management Solution.** Each case is then routed to the appropriate contracted provider or case advocate, ensuring all intake flows through one system.



Assistance Request Form - Sample

2. Clients will be able to apply for assistance, view their own case status, and receive communications from the Solution.

Yes, clients apply for assistance using the Assistance Request Form, delivered into the Unite Us platform to create their case. Individuals who opt-in to receive notifications receive automated **SMS/email updates** indicating the most recent status of their case. These updates are generated by the platform's integrated messaging feature and stored in the case record.

3. The Solution will support imports of any supporting documentation required by law to a specific case file.

Yes, the Unite Us platform enables applicants and providers to upload documentation needed for proof of residency, income, or disaster-related damage through the ARF or directly into the case file. The system accepts **multiple formats (PDF, JPG, DOC)** and attaches them to the household record. In addition, comments or notes can be stored with each file, creating a complete case record. Disaster Case managers can also import or load any documentation into a clients case file through the Unite Us platform.

4. The Solution will provide communication to clients through email or SMS text messages that will be saved with the case file.

Yes, the platform includes integrated messaging functionality that delivers email and SMS text notifications to the clients about their case. Each message is **automatically logged within the case record**, preserving a full communication history alongside case documentation.

5. The Solution will restrict access based on user roles and provide administrative screens to manage the users' roles. Roles may consist of, but not limited to:

- a. Full Administrative Access: Agency staff
- b. Access to specific functions: Advisor staff, contract staff.
- c. Public Access (No Administrative Access): General Public

Yes, Unite Us provides access through **Role-Based Access Controls (RBAC)**. Administrators use the **Admin Console** to assign and adjust permissions for Agency staff and contracted providers. This ensures that users only see and perform actions appropriate to their role:

- **Full Administrative Access (Agency staff)** – manage system and reporting.
- **Function-Specific Access (Advisor/Contract staff)** – manage assigned client cases.
- **Public Access (General Public)** – submit applications without administrative access.

6. Administrators will be able to post notifications to the website and/or to users as needed for advanced notice of outage windows or other system down times.

Yes, the Unite Us platform utilizes website notifications and notices to communicate pertinent information to users. These notifications provide timely updates about outages, scheduled downtime, or program announcements to end users of the platform.

2.1.2. Solution Specifications

2.1.2.1. The website will be accessible to the general public with an administrative portal that can be either internal to the State or not. Describe how the Solution will be hosted.

Unite Us' platform is delivered as a **cloud-hosted SaaS solution**. The Assistance Request Form (ARF) is publicly accessible through any modern browser, while administrators and providers access the secure portal using role-based authentication. Hosting is external to the State and is provided by Amazon Web Services (AWS) with secure access for all authorized users.

2.1.2.2. The Solution will keep personally identifiable information (PII) confidential and secure. Describe how the data will be stored and how PII data will be treated differently.

Following the highest security frameworks in the industry, Unite Us manages the safety and security of the information that flows throughout the system. PII is encrypted **in transit (TLS 1.3)** and **at rest (AES-256)**. The solution is hosted by AWS in geographically distinct data centers to ensure redundancy. All data is stored within the United States. The solution is continuously monitored for vulnerabilities with real time alerts in the event anomalies are identified. Access to PII is restricted by **role-based access controls (RBAC)**, and all user actions are captured in robust audit logs. The Unite Us Platform is HITRUST, NIST and SOC 2 Type 2 certified, as well as HIPAA compliant.

2.1.2.3. Describe respondent's testing process and any expectations of the Agency for testing. Include security testing.

Unite Us performs unit, regression, and integration testing for all releases, along with annual third-party penetration testing and security auditing. Unite Us coordinates all third party audits and there are no expectations of the Agency for testing. Third party security testing reports can be provided upon request.

2.1.2.4. Provide your approach to backward browser compatibility information and Solution currency going forward.

As a SaaS solution, the platform is continuously updated to ensure compatibility with evolving commercially available browser standards. Regular testing across browsers and devices ensures a consistent user experience for case advocates, administrators and residents accessing the system.

2.1.2.5. The Solution will not require a long-term or full user license for each client. Where possible, the Agency seeks surge licensing when disaster cases are active or guest licenses for clients needing limited functionality.

1. Minimum number of full concurrent licenses – 25
2. Maximum licenses in use at one time – 125

Unite Us' platform uses a role-based licensing model. Clients apply through the Assistance Request Form (ARF) without requiring a license. Agency and provider staff are issued individual credentials associated with a license, with surge licensing available during declared disaster events. The system supports rapid onboarding of new users, ensuring scalability when caseloads spike.

2.1.3. Usability/Accessibility

2.1.3.1. The Solution will provide an intuitive path for lowans who have been affected by a disaster to apply for assistance including older applicants, those with diverse cultures and backgrounds, or those with disabilities.

lowans affected by a disaster will apply for assistance through our Assistance Request Form (ARF) designed to be simple, accessible, and inclusive for all applicants. The ARF:

- Supports 35 languages
- Is fully mobile responsive, allowing residents to use smartphones, tablets, or computers
- Is ADA compliant, with features that meet accessibility standards
- Has been successfully deployed in multiple major disasters nationwide

2.1.3.2. The Solution should use the most common terminologies in textual navigation and high contrast colors for the look and feel.

Yes, Unite Us designs our solutions to be accessible and intuitive by the broadest audience possible. This includes:

- Common, plain language terminology in navigation and instructions
- High-contrast colors and clear typography for clear visibility
- Screen reader compatibility and ADA-compliant design standards
- Simple, intuitive workflows that reduce confusion for users of all ages and abilities

2.1.3.3. The Solution will have the ability to translate public-facing forms and information into other languages besides English, including (but not limited to) Spanish, French, Arabic, and Swahili.

The public-facing ARF can be translated into **35 languages** including Spanish, French, Arabic, and Swahili. Beyond the ARF, the platform also supports multilingual communication:

- **Resource sharing:** Users can send information via email or text in a community members' preferred language, chosen from a drop-down of **more than 130 languages**
- **Seamless experience:** when recipients open a link, resources automatically appear in the selected language

2.1.3.4. The Solution will operate on modern web browsers on both mobile and desktop and be scalable to future standards.

The SaaS solution operates on modern web browsers, including Chrome, Edge, Safari, and Firefox, across both mobile and desktop devices, and is continuously updated to remain secure, scalable, and compatible with evolving browser and technology standards.

2.1.3.5. The website associated with the Solution will be compliant with the Americans with Disabilities Act of 1990 (ADA). See Fact Sheet: [New Rule on the Accessibility of Web Content and Mobile Apps Provided by State and Local Governments | ADA.gov](#)

Yes, Unite Us complies with ADA requirements - and meets WCAG 2.1 AA standards.

2.1.3.6. The Solution will support tracking changes to client data. Updates to a client's data will be immediately available for viewing in real time.

Yes. The solution supports full tracking of all client data changes, with updates immediately available in real-time.

2.1.3.7. The Solution will provide the ability to define and manage retention schedules for documents as well as the client's profile information and history.

Unite Us retains all data pursuant to regulatory and contractual obligations. Our default retention schedule is ten years.

2.1.3.8. The Solution will allow for the use of electronic signatures on documents.

Yes, the Assistance Request Form (ARF) and Unite Us' platform support the use of electronic signatures. Applicants provide an electronic signature before submitting the ARF, confirming their consent to share their information in order to receive services.

2.1.3.9. The Solution will provide data validations on form entries (e.g., using standard Social Security Number (SSN) validations per the Federal Social Security Administration). An edit check for entering individual SSNs that is compliant with the Federal Social Security Administration protocol for determining erroneous, improbable or fraudulent SSNs is required.

In the Unite Us platform, Social Security Numbers (SSNs) are able to be captured in a structured field. The technology conducts input validation on structured fields, including SSNs, to ensure they conform to the required standard format but does not provide native functionality to verify the validity of individual SSNs.

2.1.3.10. The Solution will have the ability to track progress on an individual client's application.

Our solution empowers Agency employees and providers to track progress on an individual client's application.

2.1.4. Reporting and Data

2.1.4.1. The Solution will produce system level reports for state staff to view applications, statuses, advocate assignments, and any assistance provided to applicants.

Yes, Unite Us' **Insights Center** provides state staff with standard, pre-built aggregate-level reports to monitor program activity. These reports display application submissions, current statuses, advocate assignments, and assistance provided to applicants. Real-time access to this information enables state staff to oversee program performance, ensure accountability, and make data-informed decisions.

2.1.4.2. Administrators will be able to query and extract real time data at will. Describe ad hoc reporting capabilities available in the proposed Solution.

Administrators can access the Insights Center on-demand, 24/7, to query and extract real-time data. Reports can be filtered by multiple criteria and downloaded in a variety of formats for further analysis or sharing. These ad hoc capabilities give administrators the flexibility to answer program questions quickly, monitor performance and support timely decision-making

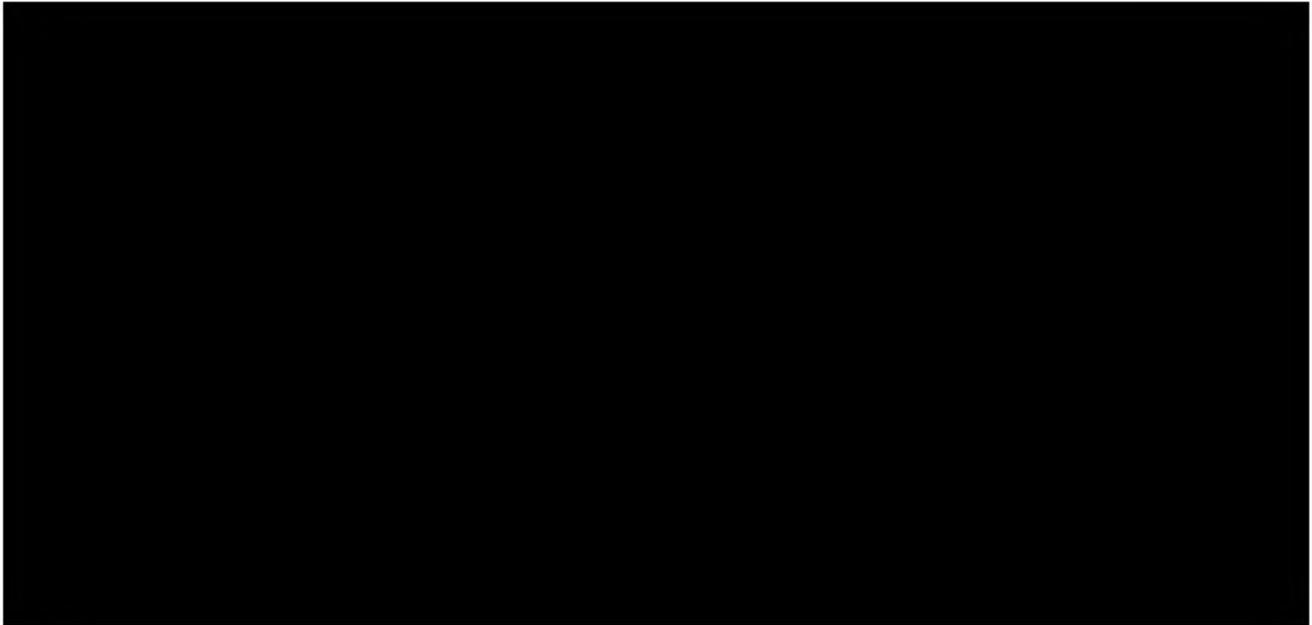
2.1.4.3. The successful Respondent will facilitate loading existing data into the Solution. The Solution will allow administrators to import data into the Solution. Describe the proposed solution's process for doing so and the data formats used.

Unite Us will set up a **Client Roster Ingestion** to load existing data from Agency records into the platform in a pre-specified format. During the ingestion process, records are analyzed for potential duplicates and are matched using our **Enterprise Master Person Index (EMPI)**.

The EMPI is an industry-leading identity management solution that:

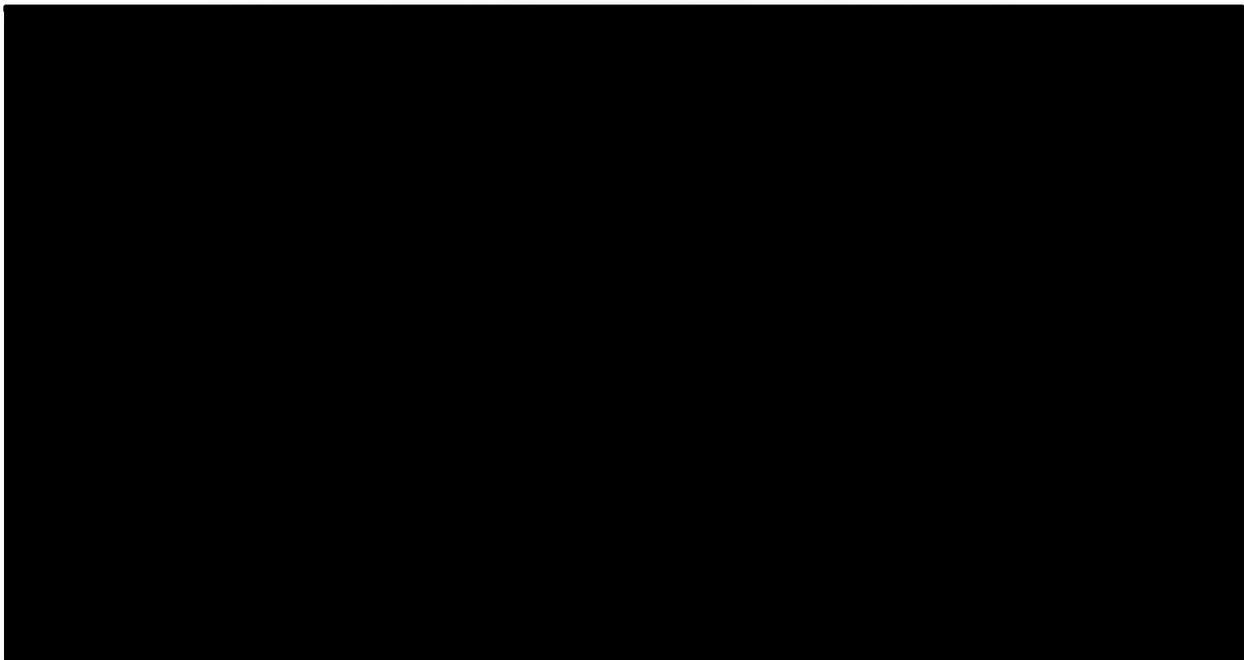
- **Reduces duplication** by matching records across sources
- **Maintains a single, longitudinal record** for each individual
- **Supports shared care planning** across health and community care settings, even as demographic details (e.g. name, address, phone) change

This approach ensures a smooth migration of existing data while preserving accuracy, continuity and integrity for case management and disaster response.



2.1.4.4. The Solution will provide a standardized report design, primarily for headers, footers, along with general look and feel like fonts, logos, and possible graphical elements. Provide an example of standardized report design.

Unite Us has a standardized report design across all dashboards available through the Insights Center which includes normalized headers, footers, fonts, logos, and graphical elements.



2.1.4.5. Reports will be downloadable in Word/PDF/CSV formats at user's choice.

Yes, reports are downloadable in a variety of formats, including as an image, data, crosstab, PDF, or PowerPoint.

2.1.4.6. The Solution will recognize that some data elements may need to be protected from view from users with certain roles.

The Insights Center is restricted by role-based access controls (RBAC), which means that not every user can see the same data or reports. Access to the Insights Center (Unite Us's reporting and analytics tool) is based on the role assigned to a user. For additional details please see our response to 2.1.5.

2.1.4.7. Describe how reporting errors can be managed – How do you identify issues so they can be tracked and addressed.

Issues are identified as part of our quality assurance process. In fact, quality assurance is a defined step in our software development life cycle (SDLC) and change management process for all of our products. Methods for testing can include multiple accuracy tests, both manual and automated. In line with industry best practices, we automate as much of our quality assurance pipeline as possible. We validate each part of the system across numerous environments to prevent regression and ensure that you are receiving high quality service.

2.1.4.8. Describe additional reporting tools that may be available.

In addition to the out-of-the-box aggregate-level reports available through the Insights Center, Unite Us also proposes our Recurring Data Delivery (RDD) solution to the state. RDD is composed of person-level files delivered to the state via sFTP.

These data delivery files enable the state to view and analyze row-level information on the care journeys logged in our platform for Iowa residents. Additionally, because our platform uniquely assigns identifiers to all residents referred in the network, the state can combine case and outcomes data from our referral platform with other sources—such as an existing data warehouse—to perform a true, 360-degree analysis of your residents.

2.1.5. Security and Risk Management

2.1.5.1. The Solution will be compliant with NIST 800-53 federal rules for information security. See [SP 800-53 Rev. 5. Security and Privacy Controls for Information Systems and Organizations | CSRC.](#)

Unite Us is compliant with NIST 800-53.

2.1.5.2. The Solution will provide audit tracking of user access and actions within the Solution.

Our platform logs all interactions by users, and monitors usage and access. Unite Us manages audit logs and can provide reports on user access and audit of access to specific information to users upon request.

2.1.5.3. A data flow diagram must be developed for the portal and submitted to the Agency no later than 30 days after execution of the contract.

Unite Us maintains a Data Flow Diagram and can provide it upon request.

2.1.5.4. Solution must maintain compliance with applicable State\Federal security requirements including Criminal Justice Information Services (CJIS).

Unite Us is not the system of record for CJIS information and CJIS information is not stored in the platform. Unite Us is compliant with HIPAA and leading security frameworks such as HITRUST and takes extensive measures to protect the privacy and security of information contained in its system.

2.1.5.5. Full SSN will not be displayed after initial data entry.

Confirmed. SSNs are hashed after initial data entry.

2.1.5.6. Describe the security practices of your company, including:

Our HIPAA-compliant and HITRUST-certified platform enables all providers to securely exchange meaningful care information.

Unite Us takes proactive measures to ensure the safety and security of the information that flows through the system. All data in our platform is encrypted at rest and in storage. In transit, data is transmitted using TLS/SSL certificates with 256-bit encryption. At rest, data is stored on encrypted volumes using AWS Key Management Services (AWS KMS). Each volume is encrypted with a unique, 256-bit key. All keys are protected by AWS' key management infrastructure, which implements strong logical and physical security controls to prevent unauthorized access. Amazon's overall key management infrastructure uses Federal Information Processing Standards (FIPS) and 140-3 approved cryptographic algorithms; it is consistent with the National Institute of Standards and Technology's (NIST) 800-57 recommendations.

Access to our platform is role- and permission-based. This structure is the backbone of our HIPAA-compliant architecture. All software users on our platform are assigned user roles, and

each role is associated with specific permissions for sending and receiving referrals, accessing client information and history, and completing applicable tasks within the application. Users can only view information in service categories based on the permissions associated with their role and responsibilities and only for clients to whom they are providing services.

2.1.5.7. Describe how security risks, failures and intrusions are tracked and reported.

Unite Us conducts regular internal and external assessments of environments to confirm that they operate in accordance with our implemented security frameworks. In addition, we engage independent third-party auditors to conduct risk assessments and security certification audits at least annually. Targeted penetration testing of our platform is also conducted at least annually by an outside testing firm, and continuous vulnerability monitoring runs 24x7x365, with real time alerts in the event anomalies are identified. If a risk is identified it is ticketed and tracked until remediated, pursuant to our incident response and remediation policies.

2.1.5.8. Describe how security breaches are handled.

Unite Us follows a defined incident response plan which allows incidents to be handled consistently and effectively. Our incident response plan incorporates workflows from relevant industry standards, including HIPAA and NIST 800-53.

In the event of a known or suspected breach, the plan would be enacted and the incident would be escalated to a pre-assigned incident response team. The team would then take steps to review, mitigate, investigate, remediate, and resolve the matter.

Unite Us would provide notification of a breach pursuant to the terms of the governing contract and within the time frame mandated by the customer.

Applicable team members receive incident response training at least annually, and table top exercises and drills are conducted by a third party.

2.1.5.9. Describe backup and recovery in any disruptive event. What is the expected time to recover? What is the maximum data loss expected?

Unite Us' platform is designed to leverage horizontal scaling across its infrastructure. Data stores are clustered with automated failover/reorganization in the event of individual instance failures.

- We **backup data hourly, with automated monitoring** and alerting in case a backup fails.
- We test backups intermittently and we use standard toolsets to verify backups.
- **Data is archived and stored in two data centers:** one primary on the East Coast and one backup on the West Coast.
- Databases are clustered and replication and backup happens across the cluster.

Most failure situations are quickly fixed through automated processes that restart failing components and restore the system within a few minutes of a failure event.

If these automated processes cannot solve the problem, our platform's Recovery Time Objective (RTO) is 0-12 hours. Our Recovery Point Objective (RPO) is one hour. We prioritize restoring mission-critical services before secondary services.

Unite Us maintains a Business Continuity and Disaster Recovery (BCDR) Plan to coordinate recovery of critical business functions in the event of a disruption or disaster. The BCDR plan is reviewed and tested at least annually and includes RPO and RTO standards. Our platform has a standard uptime SLA of 99.9%, with historical uptime exceeding this level.

2.1.5.10. The successful respondent will provide their Disaster Recovery Plan no later than 30 days after execution of the contract.

Unite Us maintains robust and regularly updated business continuity, backup, disaster recovery, and support plans and protocols. Unite Us will provide its BCDR plan no later than 30 days after execution of the contract.

2.1.5.11. The Solution will provide the ability for the highest-level role to see an audit trail of customer actions through administrative screens.

Unite Us manages audit logs and can provide reports on user access and audit of access to specific information to users upon request.

2.1.5.12. Describe your approach to risk management and any programs you have in place to avoid hazards that are specific to the services provided.

Unite Us has a robust security and information risk management program. The Unite Us Information Risk Council (IRC) is a committee of executive leadership and department heads, which is responsible for the overall risk management of the organization. The IRC is chaired by the Vice President of Compliance and meets monthly. Our security and information risk management program requires all employees to successfully complete information security training upon hire and annually thereafter. Policies and procedures governing the management of information security are presented to all employees for review and ongoing reference.

Unite Us operates in accordance with policies and procedures that comply with applicable laws and regulations. We also engage third-party auditors annually to conduct audit evaluations of third-party security frameworks.

In addition to policies and training, Unite Us manages information security risks through technical controls such as mobile device management and anti-virus solutions, data loss prevention solutions, and other technical tools designed to ensure the security of the information within our platform. Targeted penetration testing of our platform is conducted at least annually by an outside auditor. Finally, we conduct thorough monitoring of our own systems, including continuous vulnerability monitoring that runs 24x7x365, with real time alerts in the event anomalies are identified.

2.1.6. Implementation

2.1.6.1. Within 30 days of contract execution, the successful Respondent will provide a detailed implementation plan to the Agency. Describe recommended implementation strategy including on-site and virtual coordination and support services, best practice consulting options and professional services.

Unite Us will deliver a **comprehensive implementation plan** to the Agency within 30 days of contract execution. The plan will define project phases, timelines, milestones, assigned resources, and measurable success criteria.

This implementation plan will be built to include the project specific requirements of this RFP and the needs of the Iowa community. The plan will leverage Unite Us' extensive experience deploying systems to support disaster response. We will ensure that the solution is ready and able to support Iowa in times of crisis and is flexible enough to meet the unique circumstances that each disaster brings.

Our recommended **implementation strategy** follows a phased approach that balances speed with long-term sustainability:

- **On-site and Virtual Coordination:** Dedicated implementation staff will conduct kickoff and training sessions either on-site or virtually, depending on Agency preference. Ongoing meetings are delivered through secure web conferencing, enabling consistent alignment between project teams.
- **Support Services:** An assigned Implementation Manager and Customer Success Manager provide day-to-day coordination, facilitate workflow design, and manage issue resolution throughout the project.
- **Best Practice Consulting:** Unite Us applies lessons learned from previous statewide implementations to recommend configuration options, data workflows, and user adoption strategies that align with disaster case management and assistance grant operations.
- **Professional Services:** Unite Us' professional services team will provide general project support tailored to the Agency's needs, including system configuration, data preparation and loading, set-up of forms and workflows, and the development of reporting dashboards. Our training specialists will deliver role-based instruction for Agency staff, contracted providers, and community users, supported by online guides and recorded materials. These services are designed to enable a smooth implementation and long-term sustainability of the system.

Our recommended **customer success strategy** follows a phased approach that emphasizes early impact, sustained adoption, and long-term partnership to ensure measurable outcomes and ongoing alignment with your goals.

- **Dedicated account team:** A named Customer Success Manager, supported by technical staff, coordinates day-to-day operations, monitors performance, and engages strategically with the State's Emergency Management team.

- **Engagement cadence:** Weekly or bi-weekly operational check-ins, monthly adoption/performance reviews, quarterly business reviews with executive stakeholders, and an annual strategic planning session aligned to contract deliverables.
- **Performance & outcomes:** In partnership with the Agency, we define KPIs—system uptime, user adoption, data-integration milestones, and incident-response improvements—and report them via standardized dashboards and quarterly summaries.
- **Readiness integration:** We participate in statewide exercises, after-action reviews, and readiness assessments consistent with FEMA/NIMS to support preparedness and recovery objectives.
- **Risk management & continuous improvement:** We apply SLAs and clear escalation paths, track corrective actions, and run continuous-improvement cycles to strengthen reliability, user satisfaction, and long-term program results.

This phased approach — from discovery and configuration through training and go-live — enables a smooth transition to the platform while maintaining continuity of disaster recovery operations.

For additional details, please see our response to sections **2.5 Transition Plan** and **2.6 Implementation Schedule**.

In the event of a declared disaster or State-identified surge, and in addition to the services described in this response, Iowa may elect to contract with Unite Us for additional Professional Services – Disaster Surge Support.

2.1.6.2. Within 30 days of contract execution, the successful Respondent will provide a detailed staffing plan to the Agency. The plan will contain the names and background experience of all resources assigned to the project implementation, as well as a succession plan to replace a resource as needed, with Agency approval.

Yes. Unite Us will provide a **comprehensive staffing plan** within 30 days of contract execution. The plan will identify all personnel assigned to the project, including their names, roles, and background experience relevant to disaster case management, grants administration, implementation, and support. Each assigned resource’s responsibilities will be clearly outlined to ensure accountability. In addition, the plan will include a **succession process**, ensuring that if any resource becomes unavailable, a qualified replacement with comparable experience will be proposed to the Agency for approval prior to transition. This guarantees continuity of expertise and service delivery throughout the project.

2.1.6.3. The successful respondent will provide implementation support, including:

- 1. Training material and user guides that are available to administrators and users to prepare for implementation and for ongoing use of the application.*
- 2. Process to submit questions or to report issues.*
- 3. Help desk support for state and applicant users, during and outside of business hours.*

Unite Us provides structured implementation support that equips staff and applicants with the tools and resources they need:

1. **Training material and user guides** – Training resources are provided **before go-live** to prepare users. Administrators and end users receive access to a centralized **learning portal** with step-by-step guides, workflow documentation, quick reference sheets, and video tutorials. These materials are available **online 24/7**, ensuring staff and contracted providers can access them anytime. During implementation, Unite Us conducts **live, role-based web training sessions**, scheduled in consultation with the Agency's teams, with recordings made available for ongoing use. Materials are updated with each release so resources stay current throughout the contract.
2. **Process to submit questions or report issues** – Users can submit support requests directly in the platform using an embedded widget, or by email or phone. All inquiries are tracked in Unite Us' ticketing system, which provides case numbers and status updates. Requests are prioritized by severity and routed to the appropriate technical or customer success staff until resolved.

Our team of specialists can triage end-user questions and problems and route them appropriately to the Technology team. Customer Support specialists handle primary support, including login and password questions, user configuration support, referral assistance, and more. Questions that require additional technical support are documented and escalated to a Technical Support specialist for review. Technical Support specialists work closely with our technology team to understand, document, delegate, and resolve the issue. These team members are experts in the software, training, and user behavior.

When our support team is made aware of a potential issue, bug, or functionality that is not working, the relevant team member first assists with immediate navigation support and troubleshooting. If the issue is not quickly resolved, it is reported to the Unite Us engineering team through a prioritized ticketing system. Tickets are sorted and triaged in real-time by a manager. The team monitors activity and service issues to ensure we deliver a high level of service. We are committed to assigning and maintaining the appropriate number of project staff. In the event of unexpected surges in activity and/or service issues, support specialists and managers have the authority to escalate a request to obtain additional resources from our pool of talented team members. We quickly align the appropriate resources to maintain business operations per the contract.

3. **Help desk support** – Unite Us operates a multi-channel help desk for Agency staff, contracted providers, and applicants. Standard coverage is **Monday through Friday, 7:00 a.m. to 10:00 p.m. Central Time**, ensuring availability throughout Iowa's business day and extended evening hours. For urgent issues, **24/7 on-call support** is provided, especially during declared disaster events, so staff and applicants can receive assistance whenever it is needed.

2.1.7. Solution Functions

2.1.7.1. The Solution must allow acceptance rules for assistance applications to be defined for each disaster event, including but not limited to maximum amount of grants.

Unite Us' platform provides tools for program configuration and **rules for each disaster event**. These can include eligibility criteria, maximum grant amounts, and other program-specific criteria.

2.1.7.2. Each disaster must be uniquely defined and can be associated with each client case affected, including but not limited to:

1. Unique identifier for the event
2. Type or cause of disaster
3. Funds requested and date of requests
4. Location (counties, which may be added after creation)
5. Contracted Provider assigned
6. Dates (start, end, extension)
7. Federal disaster declaration date

Unite Us supports the documentation of all seven items listed above. Further, the disbursement of funds can be tracked per disaster, per client to ensure compliance with each event.

2.1.7.3. Describe how applicants will be able to apply for assistance within the Solution.

Applicants can apply for assistance through the **Assistance Request Form (ARF)**, which is embedded directly on the state's public-facing website.

- The ARF is mobile-responsive, ADA-compliant, and available in multiple languages.
- Applicants enter household and eligibility information in a simple form.
- Once submitted, the application automatically generates a case in the Unite Us platform for review by the State or assigned case advocate.
- Applicants receive confirmation that their request was submitted, and advocates can begin outreach immediately.

This streamlined process ensures residents can apply quickly and securely, while the State maintains consistent intake and immediate visibility.

2.1.7.4. Describe how applicants can upload documents in support of their assistance applications.

Applicants are prompted to upload supporting documents while completing the ARF.

- The platform accepts multiple file types including text, image, audio, and spreadsheet formats (csv, doc, docx, pdf, rtf, txt, xls, xlsx, gif, jpg, jpeg, png, mp3, m4a, wav, wma)
- Uploaded documents are stored securely in the client record
- Notes or comments can be added to each upload to provide more context for reviewers.

This ensures applicants can easily submit required documentation in common formats, while the State maintains secure records for program compliance and auditing.

2.1.7.5. Describe how users can review and evaluate assistance applications.

Agency staff and contracted providers review and evaluate applications through a secure, role-based portal.

- Dashboards allow users to **view cases, verify supporting documents, assess eligibility, and record determinations.**
- Automated notifications alert users when cases require review or additional action.

2.1.7.6. Describe how documents are managed and accessed on the Solution.

All case-related documents are managed through **secure, centralized document storage** within the platform.

- **Role-based permissions** ensure only authorized staff access information in line with their role
- **Case-linked Storage:** Documents can be tied to an associated case record for easy retrieval
- **Secure Access:** All files are encrypted in transit and at rest.

2.1.7.7. The Solution must be able to connect with the state's payment system via application programming interface (API) and provide users with the ability to track assistance payments from generation to recipient.

Unite Us' **Payments solution** is designed to connect with state financial systems through automated transactions and secure **APIs**. However, further discovery is required to determine the feasibility and best-fit technical solutions for Iowa.

While the actual disbursement of funds happens outside of Unite Us, the platform allows users to:

- Monitor direct cash assistance and services delivered.
- Link each payment to associated disaster event and client record, creating a full audit trail from request to recipient.



2.1.8. Optional Features

Provide detailed information for any optional features that may be available as part of the proposed solution. If the features come at an additional cost, please list the costs for these items separately in the submitted Cost Proposal.

Unite Us offers a suite of **optional features** available for purchase on an ad hoc basis. Each feature is designed to **enhance your ability to serve communities before, during, and after disaster events**, providing additional flexibility and scalability within the solution. These features are detailed in the **Cost Proposal, Tab 2.1.8: Optional Features**. Should the Agency wish to learn more about these options, Unite Us would be pleased to provide additional information or demonstrations upon request.

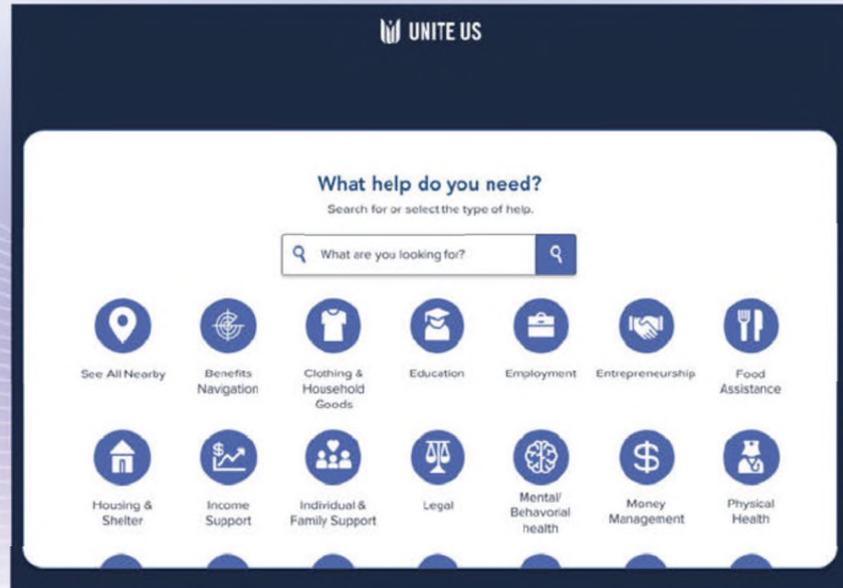
Public Resource Directory

Establishing a Public Resource Directory allows you to quickly disseminate essential resources in times of crisis, offering the public a centralized, self-service platform for accessing support and ensuring consistent information across all public-facing sites.

The public resource directory (PRD) empowers your community members to search for and connect with community care resources, lowering the barrier to access care. You can host this searchable database of resources directly on your website or client portal, tailored to match your organization's branding and location.

The PRD empowers individuals to:

- Browse for accessible community resources in their preferred language, without having to disclose personal information.
- Filter resources based on their specific needs and abilities.
- Share resources with others.



Unite Us Branded Resource Directory Dashboard - Sample

Premium User Performance Dashboard

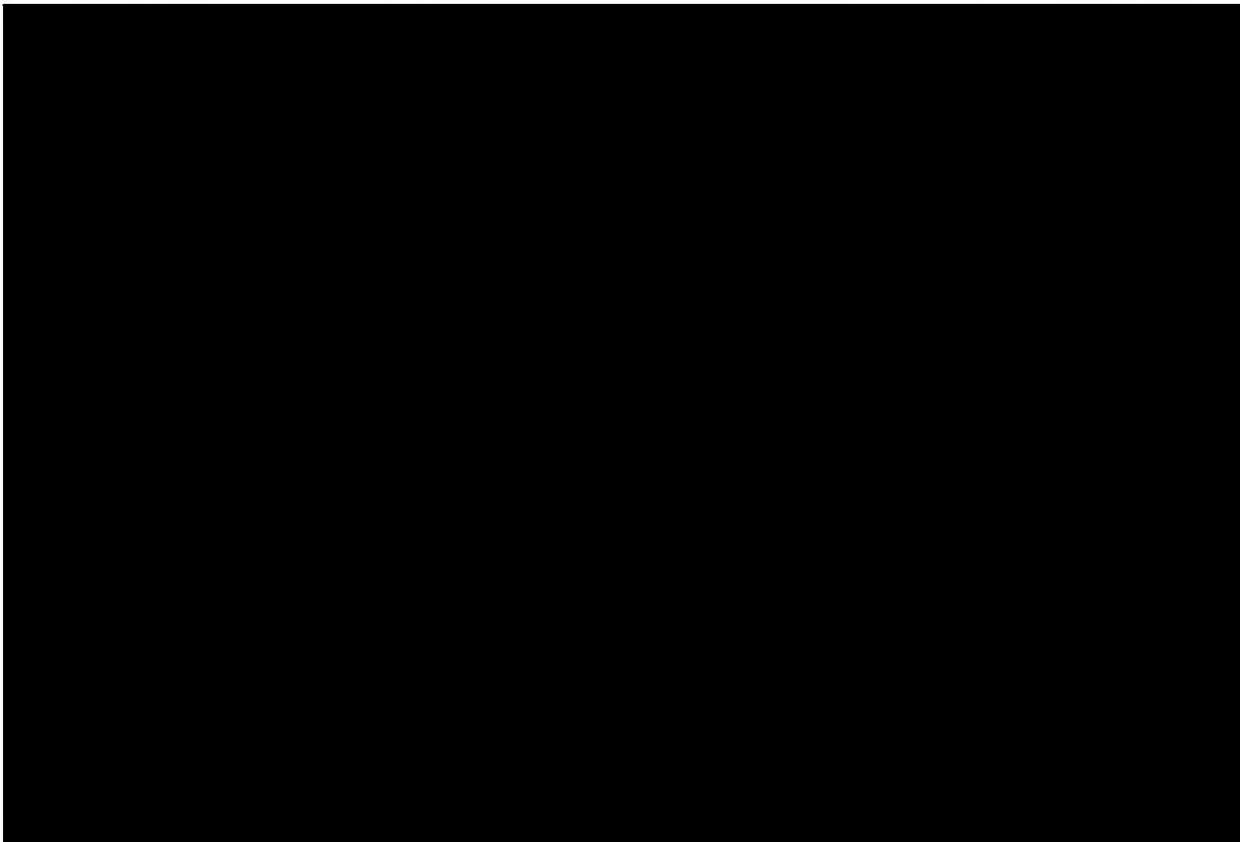
The Premium User Performance Dashboard equips the State of Iowa with **real-time visibility into network performance** during disaster response operations. This powerful tool enables agencies to **monitor how effectively the network is responding**, track service delivery trends, and quickly identify **areas where additional support or resources are most needed**.

By consolidating key performance metrics across agencies, providers, and regions, the dashboard allows decision-makers to **act on up-to-date data**, improving coordination and response efficiency. This ensures that resources are deployed strategically, gaps in service are addressed rapidly, and vulnerable populations receive timely support.

Through actionable insights and transparent reporting, the Premium User Performance Dashboard strengthens Iowa's ability to **manage, evaluate, and continuously optimize** its disaster response efforts in real time.

With the Premium User Performance Dashboard, you can unlock advanced user insights to assess productivity, platform adoption, and engagement, while optimizing performance for maximum impact. The features included in the new Premium User Performance dashboard include:

- **Customizable Goal-Setting:** Set personalized goals across key metrics.
- **Efficiency Metrics:** Access detailed case and referral data for better evaluations.
- **Data Segmentation:** Filter by demographics and services to spot trends.
- **Comparative Analysis:** Identify top performers and productivity gaps.
- **Dynamic Visuals:** Drill down into customizable, detailed data views.



Billing Solution

The Unite Us Billing Solution provides a resilient and scalable infrastructure to support **reimbursable social service delivery** during disaster response efforts. It enables the **real-time tracking, reporting, and billing** of social care services delivered across a statewide network of contracted community-based organizations (CBOs).

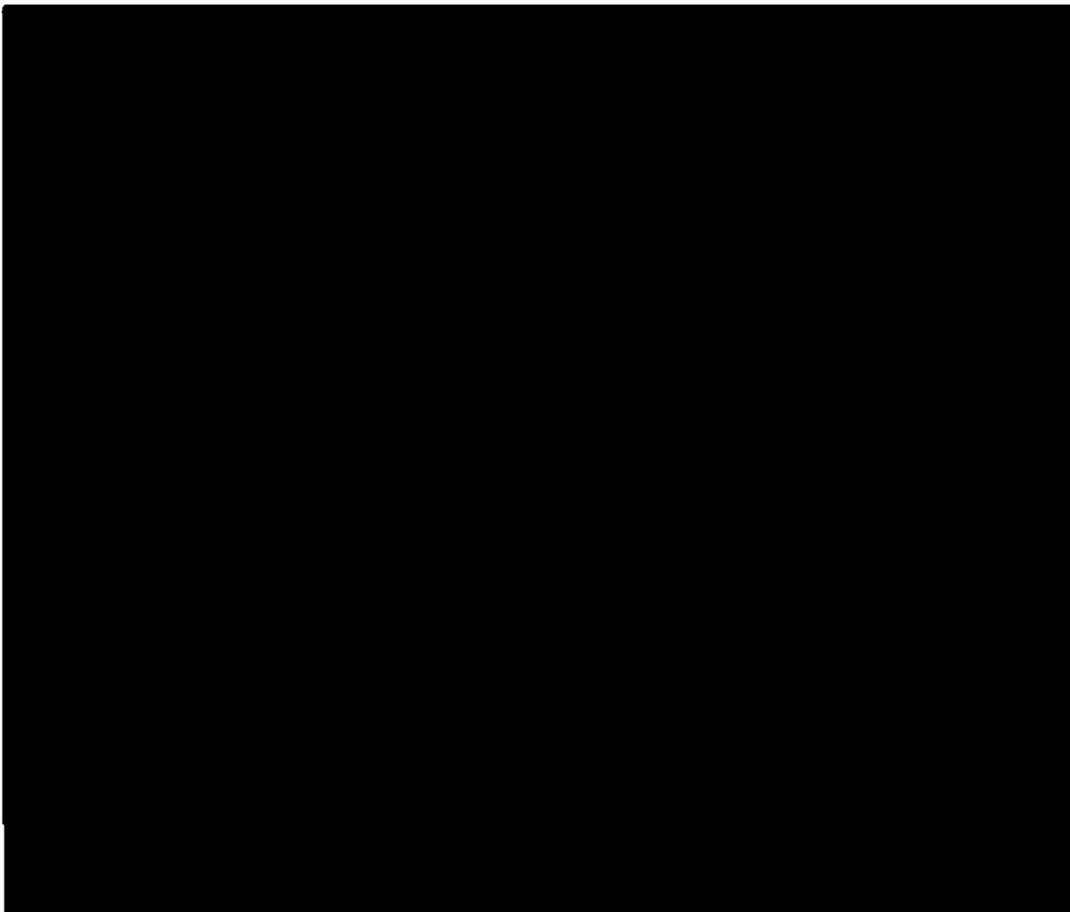
This functionality allows the State of Iowa to **rapidly capture and document services provided during emergencies**, ensuring accurate reimbursement and accountability for funds distributed under disaster recovery programs.

The solution also empowers agencies and partners to **pay, measure, and maximize the impact of social care investments**, ensuring compliance with **state and federal regulatory requirements** while maintaining fiscal transparency. By streamlining program management and financial

operations, Iowa can **sustain coordinated care, accelerate recovery, and demonstrate measurable outcomes** in times of crisis.

The **Billing Solution** is Unite Us' most implemented payments solution and allows contracted CBOs to automatically generate invoices as a step embedded in a case documentation workflow. With this solution, your users will be able to facilitate service-level tracking, reporting, and billing of social care delivered across a network of contracted CBOs.

As an optional add-on to the Billing solution, our **Claims** solution provides the ability to convert these standard invoices into EDI 837 claims. This small but mighty feature addition enables service reimbursement with funders, such as payers, who may require structured claims delivery.





2.1.9 Service and Maintenance

2.1.9.1 Describe the support model associated with the following:

1. Scheduled and on-call operational maintenance.

Unite Us centrally manages maintenance of the platform without requiring anything on the customer side. The vast majority of maintenance does not interrupt usage. In the rare case that the maintenance requires any downtime, the planned maintenance is conducted outside of office hours and is coordinated well in advance.

2. Processes for system preventive maintenance.

As a SaaS solution we provide ongoing updates to our solution, bringing innovation to our customers on a regular cadence.

We release maintenance, enhancement, and other updates to our SaaS solution biweekly. We focus on continuous integration and deployment, and perform rolling upgrades to reduce downtimes.

3. Expectations for same day response on Solution issues and/or outages.

Unite Us System Reliability and Planned Maintenance

Unite Us maintains a strong record of system reliability and responsiveness. The platform experiences no more than two scheduled downtimes per year. The Agency will receive at least 24 hours' advance notice of any scheduled maintenance. All planned outages are limited to a maximum of eight hours, unless prior approval is obtained for a longer duration.

To minimize user impact, scheduled maintenance is conducted during late-night or early weekend morning hours.

Incident Response and Resolution Protocols

Unite Us applies a structured severity-based response framework to ensure timely resolution and minimal disruption to services.

Severity 1 (Critical)

- **Average Response Time:** 15 minutes
- **Description:** Incidents with a critical business impact, such as system outages or errors affecting mission-critical applications.
- **Response:** Unite Us technical teams initiate work immediately and continue 24x7x365 until a workaround or permanent fix is implemented.

Severity 2 (High)

- **Average Response Time:** 30 minutes

- **Description:** Incidents with significant business impact that limit user functionality (e.g., system slowdowns), but allow partial use of the platform.
- **Response:** Unite Us technical teams respond promptly and continue 24x7x365 until a resolution or viable workaround is in place.

Severity 3 (Normal)

- **Average Response Time:** One business day
- **Description:** Incidents involving minor performance issues or non-critical impairments. Business tasks remain possible, though users may experience slowness or minor nuisances.
- **Response:** Unite Us technical teams provide a workaround or permanent correction within seven business days.

4. Ensuring product alignment with State plans – What measures would ensure future roadmap, support, and response to outages or Solution issues?

Unite Us is committed to continuous product enhancement and development to empower our customers with the most innovative technology possible. Our product development model and philosophy are centered in a deep understanding of our users, their role in their organization, and their goals in using our system. We conduct regular UX research with our customers to ensure we prioritize the enhancements they need/want the most. Harnessing these insights and working in partnership with customer-facing teams, our product team prioritizes our roadmap with the features, enhancements, and strategic initiatives needed to improve customer experiences and user workflows. When releasing new capabilities, we follow rigorous internal and external testing processes to ensure all new features meet or exceed customer needs and expectations.

Our Customer Success team serves as the primary point of contact, documenting requests for changes and coordinating with our product team to prioritize enhancements on the roadmap. Further, your dedicated customer success manager will meet with you on a regular basis, providing updates on Unite Us innovation, roadmap priorities and opportunities for early access to new features to provide user adoption feedback.

5. Provide detailed information on your customer service program and maintenance plans. Include response times and the access to and timeliness of service engineers.

Unite Us provides a comprehensive customer service program and maintenance plan designed to ensure high availability, rapid issue resolution, and proactive communication.

Platform Maintenance and Upgrades

- Our **cloud-based SaaS platform** uses a distributed, elastic architecture to maximize uptime.
- **Patches and upgrades** are centrally managed; rolling deployments allow individual components to be updated without impacting the entire system.

- Routine releases include maintenance, feature enhancements, and new products on a **biweekly cadence**.
- All releases follow a formal **release management process** that includes internal training, quality checkpoints, and customer communication.
- Upgrades are intentionally scheduled during low-use periods, with proactive communication if downtime is expected.

Customer Support and Success

- Each partner is assigned a dedicated Customer Success Manager (CSM) who provides direct, personalized support and facilitates joint success plans and regular business reviews.
- Our **Customer Support team** provides technical assistance, including platform configuration, logon support, and troubleshooting.
- Support resources include **online documentation, user guides, and training materials**, updated with each release.

Support Channels and Escalation

- Customers can submit requests directly.
- Issues are logged and tracked in our ticketing system, with escalation paths to technical engineers as needed.
- Uptime and performance are monitored 24X7, following industry best practices for outage management and resolution.

Response Time by Severity

For reported incidents, Unite Us takes the following action:

- **Severity 1 (Critical):** Average response time is 15 minutes. These incidents have a critical business impact, such as errors affecting mission-critical applications or shutting down the system. Unite Us technical teams immediately start work and continue working (24x7x365) until a workaround or error correction is achieved.
- **Severity 2 (High):** Average response time is 30 minutes. These incidents have a significant business impact and limit user functionality. While the impact is significant, our customers can continue some of their in-app work. An example would include a software slowdown. Unite Us technical teams start work and continue working (24x7x365) until a workaround or error correction is achieved.
- **Severity 3 (Normal):** Average response time is one business day. These incidents result in the product system being impaired. Unite Us customers can accomplish business tasks, but they are experiencing slowness and/or small nuisances in the process. Unite Us' technical teams are committed to providing a workaround or error correction within seven business days.

6. Provide the ways support can be contacted during normal business hours.

Unite Us provides multiple support channels during normal business hours (7:00 a.m. to 10:00 p.m. Central):

- **Live Chat:** Accessible within the platform for real-time support
- **Email:** Support requests can be submitted and are tracked in our ticketing system
- **Phone:** Direct line to our customer support team
- **Customer Success Manager (CSM):** Available by phone for programmatic questions and escalations

Outside business hours, users can submit requests through live chat or email for next-day follow-up. For urgent issues, our emergency support phone line is available 24/7, ensuring continuity during disaster events or system-critical issues.

7. Describe how technical support is tracked.

Unite Us tracks and manages technical support through a structured, tiered process:

- 1. Primary support, Customer Support Specialists**
 - a. Handle common issues such as login and password resets, user configuration support, referral assistance.
 - b. Provide immediate troubleshooting and navigation support.
- 2. Escalation and Technical Support**
 - a. Questions that require additional expertise are documented and escalated to a **Technical Support Specialist** for review.
 - b. Technical Support specialists work closely with our technology team to understand, document, delegate, and resolve the issue.
 - c. Team members bring expertise in the software, training, and user behavior.
- 3. Engineering Involvement & Ticketing**
 - a. Issues that cannot be resolved at Tier 1 or Tier 2 are escalated to the **Unite Us engineering team.**
 - b. All issues are logged in a prioritized ticketing system, which is triaged in real-time by a manager.
 - c. Audit trails capture status and activity on each ticket
- 4. Monitoring & Resource Allocation**
 - a. The support team continuously monitors activity and service issues to maintain high service levels
 - b. In the event of surges in activity, managers can immediately escalate and reallocate additional resources from a broader pool of staff.
 - c. This ensures business operations remain uninterrupted and service levels compliant with contract expectations.

8. Describe how Respondent will ensure the Solution stays current with supported versions of underlying software and hardware.

Unite Us ensures the Solution remains current with all supported versions of underlying software and infrastructure through a proactive, cloud-based maintenance program.

- 1. Continuous Updates**
 - a. As a cloud-based SaaS platform, the underlying operating systems, databases, and infrastructure components are continuously patched and updated

- b. **Rolling Upgrades** allow individual services to be released without downtime or impact to end users.
- 2. Scheduled Maintenance**
 - a. Updates and patches are centrally managed by Unite Us technical staff and scheduled during off-peak hours to minimize disruption
 - b. All updates are communicated to customers in advance, with support documentation.
- 3. Change Management & Security Controls**
 - a. Unite Us follows a formal **Change Management Policy and Secure Development Lifecycle**.
 - b. All changes undergo discovery, peer review, testing, implementation, and rollback planning before release.
 - c. Vulnerability alerts are continuously monitored and remediation is prioritized to maintain compliance and stability.
- 4. DevSecOps Practices**
 - a. Our DevSecOps approach integrates development, security, and operations into a single delivery pipeline
 - b. This ensures the platform remains stable, reliable, and aligned with industry standards for supported versions of software and hardware.

Through these practices, the Agency is assured that the Unite Us platform will operate on fully supported, secure versions of its underlying software, minimizing risk and ensuring sustainability.

2.2 The successful Respondent will submit plans referenced in Sections 2.1.5.3, 2.1.5.10, 2.1.6.1, and 2.1.6.2 to the Agency for approval within 30 days after execution of this Contract, unless specified otherwise.

Unite Us commits to submitting the plans referenced in Sections 2.1.5.3, 2.1.5.10, 2.1.6.1, and 2.1.6.2 to the Agency for approval within 30 days after execution of this contract.

2.3 The successful Respondent will document all operational procedure changes that may affect the Agency's contract within ten (10) business days of the change. The successful Respondent will provide the Agency with detailed documentation explaining all changes that may affect the Agency's contract and a timeline of when the changes will occur.

Unite Us commits to documenting all operational procedural changes that may affect the Agency's contract within ten business days of the change. Unite Us does not anticipate any changes that will impact the Agency's contract and timeline.

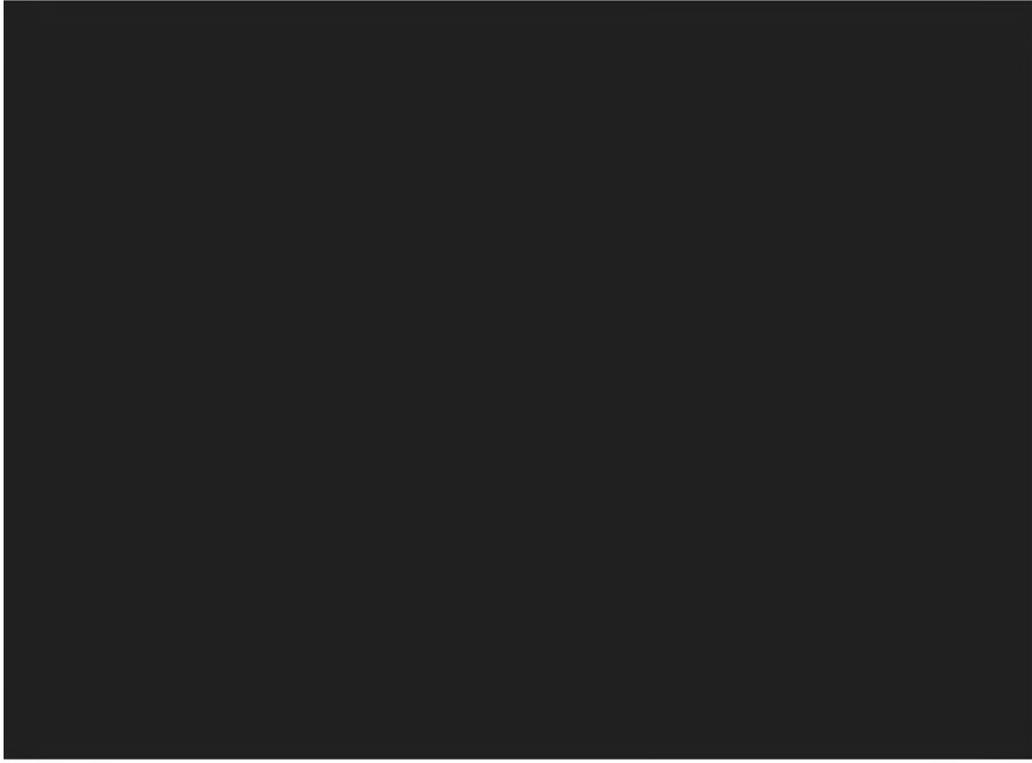
2.4 Training

Describe the training methodology to be used with Agency staff. Training materials will be provided by the successful Respondent three (3) business days in advance of the training sessions and may be provided electronically.

Unite Us' training methodology prepares Agency staff to use the platform effectively in both day-to-day operations and high-stakes emergency response scenarios. Our approach combines advance preparation, role-based instruction, and ongoing reinforcement:

- **Live Training (Role based and Scenario-driven):**
 - Delivered via instructor-led webinars or in-person sessions, tailored by user role (administrators, case advocates, providers).
 - Includes disaster-specific use cases, such as processing a surge of applications, prioritizing vulnerable populations and tracking emergency grants.
- **Self-Paced Materials (Prepare in Advance):**
 - **Training manuals, user guides, and e-learning modules** provided electronically at least three business days in advance of sessions.
 - Materials include disaster response checklists and job aid to help staff act quickly and consistently during an event.
- **Train-the-Trainer Program:**
 - Identified super users receive advanced instruction to train additional staff, ensuring scalability across the Agency.
 - Emphasis on **blue-sky preparation** to local partners and Agency staff can rapidly scale response capacity during an emergency.
- **Hands-on Role-Based Practice:**
 - Agency staff are trained in their assigned workflows, including intake, case management, Payments, reporting, and administration.
 - Simulated disaster events are used to practice managing high application volume, verifying documents, and coordinating across countries.
- **Ongoing Support & Refresher Training:**
 - Quick reference guides and access to Unite Us' **Help Center** remain available post-implementation.
 - Follow-up refresher sessions offered before storm season or anticipated high-risk periods to reinforce readiness.
 - If additional onsite or live training is required, Unite Us will provide a comprehensive scope and corresponding pricing.

This blended methodology ensures Agency staff are not only trained on the platform but are also prepared to operate effectively under the unique pressures of disaster recovery - from handling surges in assistance requests to maintaining compliance and transparency in emergency conditions.



2.5 Transition Plan

Describe your approach to managing a transition between the Agency's current contractor for similar services to your proposed service offering. The successful Respondent must submit a Transition Plan to the Agency detailing timelines and phasing of the operational readiness activities necessary to assume operations. The successful Respondent must supply all documentation, including a readiness checklist that is related and necessary for a successful transition to operations.

Unite Us applies a **structured transition methodology** that minimizes disruption while ensuring continuity of service:

- **Discovery & Assessment:** Collaborate with Agency staff and the outgoing contractor to review existing processes, data structures, and workflows.
- **Data Migration:** Use a secure ingestion process to transfer historical client records, cases, and documents into Unite Us' platform, validated against Agency requirements.
- **Phased Transition:** Operate in **parallel with the current system** for a defined period, allowing staff to validate workflows before full cutover.
- **Operational Readiness Checklist:** Provide the Agency with a detailed checklist covering user access, role assignments, data verification, reporting configurations, and communication protocols.
- **Documentation:** Deliver comprehensive guides, SOPs, and technical specifications to ensure transparency and compliance.
- **Timelines & Milestones:** Define a clear transition schedule, including kickoff, data migration, training, go-live, and post-transition support.

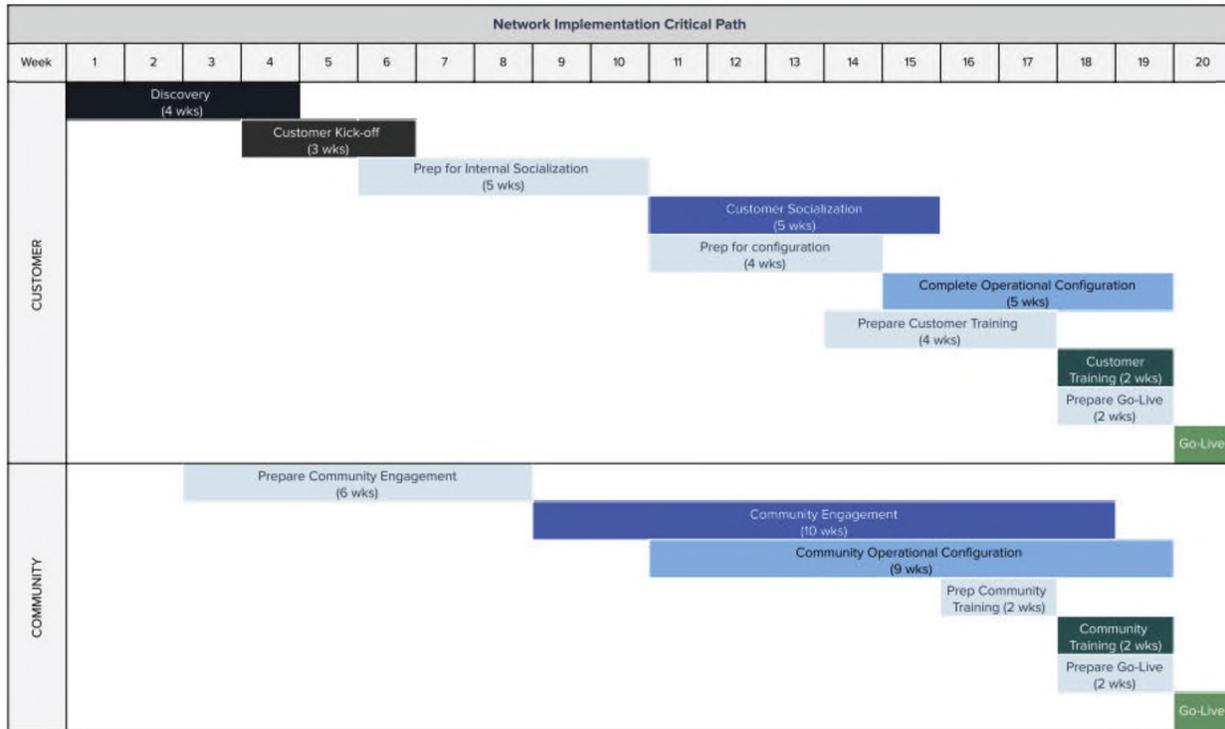
This Transition Plan ensures the Agency receives **a seamless handoff, validated operations, and complete documentation**, meeting the requirement for readiness checklists and phased operational activities.

Readiness Checklist

- Evaluate and initiate any internal approvals required for IT projects. (Approvals may include a formal IT or security assessment, CIO or CTO sign-off on the use of Unite Us or other state required documentation as needed).
- Align support from your operational leadership.
- Assign a project lead who will be Unite Us' main point of contact during the implementation process.
- Plan for end users to commit to at least two, one-hour meetings for engagement and training opportunities. Identify project leads to represent each department or end user group.
- Schedule implementation kickoff.
- Schedule recurring weekly meetings.

Transition Timeline

The following timeline presents a Transition Plan for the Agency, detailing the timelines and phases of the operational readiness activities required to assume operations.



Standard Implementation - Sample

2.6 Implementation Schedule

Please include a proposed implementation schedule, including proposed delivery dates for key tasks/outcomes outlined in the Scope of Work, in the following format: (NOTE: The following is for sample purposes only.)

Unite Us proposes a phased implementation that achieves a fully operational solution within 90 days of contract execution. This schedule is designed to give the Agency clear visibility into key milestones and to ensure that counties, advocates, and community partners are well-prepared before go-live. The timeline is also flexible, allowing it to be tailored to the size, scope, and specific needs of each project.

We've included two sample tables, which align with the RFPs formatting requirement. See the Customer Path and the Community Path below, followed by both paths formatting as a Gantt chart to provide a parallel visualization of how events unfold and overlap.

Customer Path

#	Milestone	Deliverables	Schedule
1	Discovery	Document Requirements, Establish Baseline	Weeks 1-4
2	Customer Kickoff	Kickoff Session with Customer Stakeholders	Weeks 2-4
3	Key Project Artifacts	Data Flow Diagram Disaster Recovery Plan Implementation Plan Staffing Plan Transition Plan Site Survey	Week 4
4	Prepare for Internal Socialization	Internal team preparation and alignment	Weeks 5-9
5	Customer Socialization	Customer-facing communication and alignment	Weeks 9-13
6	Prep for Configuration	System preparation for configuration	Weeks 9-12
7	Complete Operational Configuration	Configured solution enabling readiness for rollout	Weeks 12-17

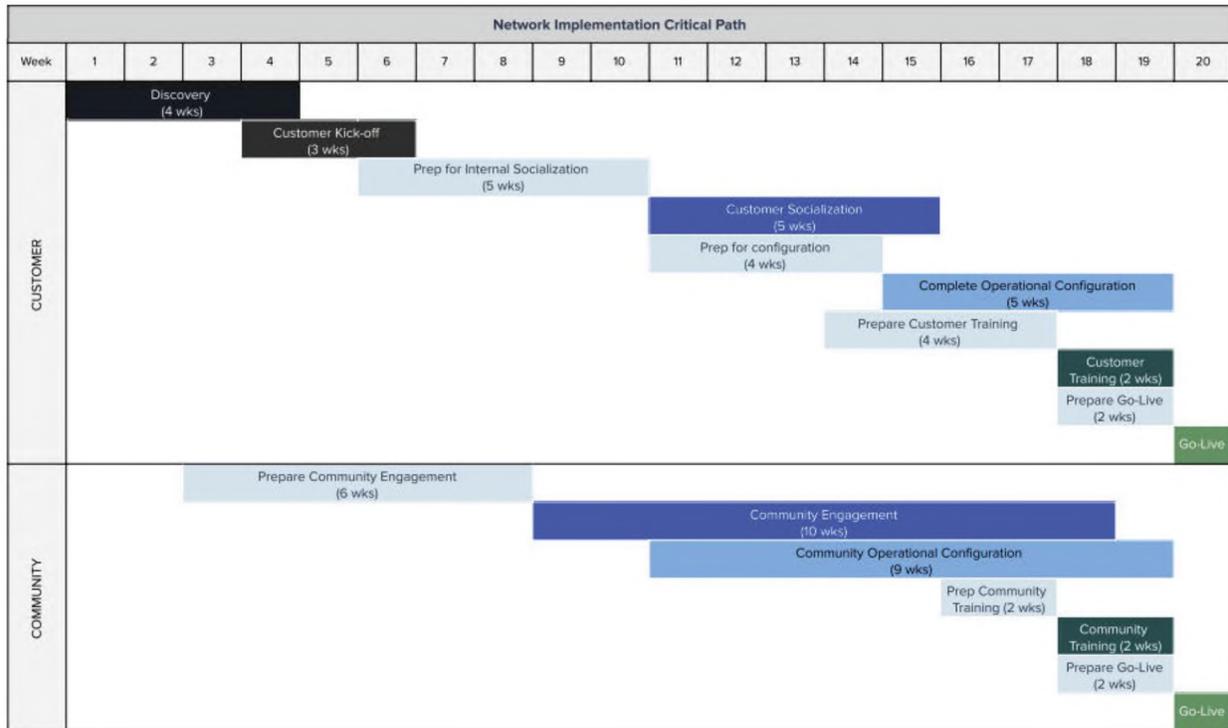
8	Prepare Customer Training	Training materials and logistics	Weeks 13-16
9	Customer Training	Training Manual Customer staff trained on system use	Weeks 16-17
10	Prepare Go-Live	Customer staff trained on system use	Weeks 17-18
11	Go-Live	Customer staff trained on system use	Week 20

Community Path

#	Milestone	Deliverables	Schedule
1	Community Engagement Preparation	Prepare Community Training	Weeks 3-8
2	Community Engagement Kickoff	Ongoing engagement sessions with community stakeholders	Weeks 8-17
3	Community Operational Configuration	Community-specific workflows and roles configured	Weeks 9-17
4	Prepare Community Training	Training plan, materials, and scheduling for community	Weeks 17-18
5	Prepare Community Training	Community members and organizations trained on platform	Weeks 18-19
6	Prepare Community Training	Community fully live and connected to platform	Weeks 20

Transition Timeline

The following timeline offers an alternate view of the two tables above, illustrating how key events roll out and where activities overlap. This same timeline is also included in our response to the previous question.



Standard Implementation - Sample

2.7 Project Organization

Describe the organizational and operational structure you intend to utilize for the work described in the solicitation and identify the responsibilities that will be assigned to staff.

Unite Us will provide the Agency with a **dedicated cross-functional project team** supported by our broader organization to ensure successful implementation, transition, and ongoing operations.

- **Executive Oversight**
 - Provides strategic alignment, risk management, and ensures contractual compliance.

- **Implementation Team**
 - **Implementation Project Manager (PM):** Leads day-to-day implementation, manages milestones, and coordinates with Agency staff.
 - **Technical Solutions Lead:** Oversees system configuration, data migration, and API/integration requirements.
 - **Customer Education Specialist:** Develops and delivers training, creates user guides, and supports “train-the-trainer” sessions.

- **Customer Success Team**
 - **Customer Success Manager (CSM):** Serves as the Agency’s primary point of contact post-go-live, manages network health, adoption, and reporting needs.
 - **Associate VP / Director of Customer Success:** Provides senior oversight, escalation support, and ensures long-term program success.

- **Support and Operations**
 - **Help Desk & Support Specialists:** Deliver Tier 1 and Tier 2 support for Agency and provider users, track and resolve issues.
 - **Data & Reporting Analysts:** Configure Insights dashboards, deliver recurring reports, and support ad hoc analysis.
 - **Platform Operations Team:** Maintains uptime, monitors performance, and applies regular SaaS updates.

Operational Structure:

- The **Implementation PM** coordinates all project activities until go-live.
- Following launch, the **Customer Success Manager** becomes the primary point of contact, supported by technical, reporting, and support teams.
- **Executive oversight** ensures continuity, escalation pathways, and alignment with Agency priorities throughout the contract term.

This structure provides **clear lines of authority, dedicated roles for each function, and a seamless transition from implementation to ongoing support.**

Section 4: Experience

The Respondent will provide the following information regarding its experience:

5.7.1 Number of years in business.

Unite Us was founded in 2013. We have been in business for 12+ years, and we have been serving Iowans since 2020.

5.7.2 Number of years of experience with providing the types of goods and/or services sought by the solicitation.

Unite Us has been providing this type of service for 12+ years.

5.7.3 Description of technical experience in providing the types of goods and/or services sought by the solicitation.

About Unite Us

Unite Us was established in 2013 to address the challenges veterans and their families faced transitioning to civilian life. Recognizing the broader need for improved access to community care, our founders expanded the platform to serve all communities. Crucially, they prioritized engaging with the community to build an accountable network, moving beyond simple resource directories.

We provide the technology, accountable network, and expert support to help you identify community care needs, prevent duplicate records, manage service enrollment, and utilize meaningful outcome data and analytics to inform community investment.

Unite Us has been serving Iowans since October 2020, one of the states in our long-standing partnership with CyncHealth Iowa, the health information exchange and data utility, connecting hospitals, clinics, pharmacies, payers, and community organizations to securely share patient health information and support coordinated care across Iowa, Nebraska, and neighboring states. This statewide network provides access to more than 21,000 community-based and public agency partners. Iowa's network is further supported through our partnership with United Way of the Midlands, who provide resource directory and navigation services to Iowans. In addition, Unite Us is proud to partner with Linn County Public Health Department, providing a locally-focused network that includes nearly 3,000 programs for residents of the county.

Disaster and Emergency Planning and Response: Proven Success in Statewide Implementations

Unite Us offers a flexible and scalable technology platform that has been successfully deployed to facilitate disaster response efforts across numerous states. Building upon our established infrastructure and expertise in connecting individuals to vital social services, we have a proven track record of rapidly adapting our platform to meet the unique challenges presented by emergencies. Our experience spans a range of disasters, including hurricanes, wildfires, and

extreme weather events, demonstrating our capability to support large-scale, statewide relief initiatives.

Examples of our impactful work in disaster response include:

Florida Disaster Response (2022–2023): With proven, multi-state experience delivering disaster support with people and technology at scale, Unite Us partnered with the State of Florida following **Hurricane Ian (2022)** to rapidly establish a secure, statewide solution accessible to government agencies and community organizations. Our platform connected individuals with community-based organizations across Florida, augmenting existing state tools for efficient and secure care coordination. We provided on-site training and onboarding at Disaster Recovery Centers (DRCs) and deployed a dedicated Care Coordination team to respond to Assistance Request Forms (ARFs), ensuring swift service connections. Our Networks, User Education, and Implementation teams accelerated onboarding to create expedited pathways to care. This model was successfully utilized again during **Hurricane Idalia (2023)** and subsequent hurricane seasons.

Requests for Help & Outcomes

- **Hurricane Ian (2022):** 25% of Floridians' requests were submitted via the online portal; over 18,600 people were assisted through Assistance Request Fulfillment (ARFs). When Unite Us Case Advocates provided Disaster Care Coordination, we achieved a 90% resolution rate.
- **Hurricane Idalia (2023):** 34% of requests for help were submitted via the online portal, and over 3,200 Floridians were assisted via ARFs.
- **Oregon Disaster and Recovery Response:** The State of Oregon contracted with Unite Us to support their disaster response and recovery efforts across the state. The Emergency Management Unit within the Oregon Department of Human Services leverages our platform to connect individuals impacted by wildfires with community-based service providers and to track the provision of those services. This statewide implementation enables deployed officers to efficiently link

2024 Florida Hurricane Relief Efforts

Hurricanes Debby, Helene & Milton

- **Total Individuals Served: 31,963**
- **Total Needs Served through the response efforts: 47,329**
- **Top 10 Needs Served through the response efforts:**
 - Emergency Food (13,561 needs)
 - Emergency Housing (10,329 needs)
 - Home Expenses Assistance/Repairs (4,841 needs)
 - Food Pantry (3,200 needs)
 - Benefits Eligibility Screening (2,514 needs)
 - Social Service Case Management (2,135 needs)
 - Emergency/One-Time Financial Assistance (1,783 needs)
 - Utility Bill Payment Assistance (1,509 needs)
 - Rent/Mortgage Payment Assistance (1,181 needs)
 - Clothing (1,151 needs)
- **~130 types of needs (ie. service subtypes) supported through the response efforts**

individuals and families with the resources needed for recovery.

These examples underscore our ability to provide both robust technology and expert personnel for disaster relief at a statewide level, ensuring efficient and effective assistance reaches those in need during critical times.

Additional information on Unite Us' approach to Disaster Response can be found in **Appendix A: Marketing Materials**.

Technical Comparison



Other Vendors

	UNITE US	Other Vendors
Outreach and Engagement and Action and Advocacy	<ul style="list-style-type: none"> ✓ Unite Us networks consist exclusively of trusted and verified partners dedicated to ensuring closed-loop referrals and providing specific outcomes. Participating organizations also have the flexibility to temporarily disable the receipt of referrals when their capacity is reached. 	<ul style="list-style-type: none"> ✗ Listing of unverified programs with no knowledge of the organization's capacity or ability to serve clients.
Expert Team of Case Advocates	<ul style="list-style-type: none"> ✓ We act as an extension of your team, connecting clients to social service resources on your behalf and managing their community care to get you the most out of our closed-loop network. 	<ul style="list-style-type: none"> ✗ No dedicated team for community care coordination means that your staff is left to add this to their already busy day-to-day workflows.
Proven Technology Infrastructure with Referrals, Screening, Intake, and Closure	<ul style="list-style-type: none"> ✓ Over a decade of supporting closed-loop referrals with our trusted network partners. One seamless system to get discrete outcomes about your clients' journeys and demonstrate real ROI. 	<ul style="list-style-type: none"> ✗ "Optional" to close the loop for referrals. Fewer than a dozen outcome types are optional for CBOs to document upon referral acceptance.
Secure and Compliant with User-friendly Consent	<ul style="list-style-type: none"> ✓ A single, secure source of truth for patient information and consent. Collect consent once (and revoke at any time) and connect clients to new services within the network. 	<ul style="list-style-type: none"> ✗ Per-referral consent requires extra data-sharing agreements and forces clients seeking care to retell their story for each referral.
One Client, One Record to assist with Monitoring and Closure	<ul style="list-style-type: none"> ✓ Longitudinal care record enables providers serving a shared client to follow that client's care journey and help meet their needs. 	<ul style="list-style-type: none"> ✗ Duplicate records for a single client make it challenging to track a client's longitudinal care journey.

5.7.4 A list of all goods and/or services similar to those sought by this solicitation that the Respondent has provided to other businesses or governmental entities.

Unite Us operates across the United States, accessing our shared closed-loop referral (CLR) technology platform, reporting solutions, and care coordination services to government agencies, community-based organizations, health systems, schools, veteran-serving organizations, and other points of entry for individuals seeking to improve their health.

Our platform connects **a responsive community network of providers that work together to jointly serve clients across historically siloed sectors and systems.** This comprehensive system allows users to **identify** client needs, **refer** them to appropriate services, track that the client is

successfully **served**, and **measure** the client- and community-level impact of their work through structured outcomes.

Our dedicated team supports customers and community partners from the discovery phase through go-live and beyond.

Our services include creating networks of CBOs, government programs, and healthcare organizations through our shared technology tools, including:

- **Closed-Loop Referral (CLR) Platform:** Our platform enables streamlined electronic referrals to be sent between programs and agencies participating in the network once these organizations have gathered the consent of the client being referred. With our platform, organizations can efficiently gather the necessary demographic and need-related information for clients with whom they are working, and securely send this information to providers. The platform includes the following features:
 - **Enterprise Master Person Index (EMPI):** The EMPI is unique to Unite Us and uses an industry-standard referential database and a client's personally identifying information to create a single client record, even with multiple entry points. "Enterprise" indicates that the index operates client matching within the technology system, and is not local to an individual organization. Using an EMPI, a client that has visited and been served by multiple hospital systems or agencies, as well as multiple CBOs, is seen as one client within the system, with a single longitudinal record within the platform. This reduces administrative overhead and time spent managing duplicate contact records, and enables operational efficiency to quickly connect clients to trauma-informed, appropriate care.
 - **SDoH Screening Tools:** Integrated screening tools to identify non-medical drivers of health and subsequently refer patients to relevant community-based services.
 - **Service Type Taxonomy and Structured Eligibility:** Information is coded into a structured taxonomy of 20 parent service types and over 150 service subtypes. Each organization self-selects the services they provide to ensure that referrals are sent only to those organizations that can serve the client's needs. Each organization is also asked to list and update structured eligibility criteria for the services that they offer in the network, enabling end users to determine whether a client is or is not a fit for a provider prior to sending a client's information to that agency. These eligibility fields include items like residency, income, work, and disability requirements.
 - **Service-Specific Assessments:** service type-specific assessments generated after the user making the referral selects the best fit recipient(s) and enables the user to gather additional need-related information on the client being referred.
 - **Structured Data Outcomes:** After the provider renders care to the client or deems that they cannot address the specific need for any reason, they are asked to close the case within two business days with a resolution, structured outcome of more than 740 defined outcomes, and care-informed note. This structured data also enables us to map network interventions to health outcomes, cost of care, and other key value metrics.

- **Public-Facing Resource Directory:** Unite Us can provide a Public-Facing Resource Directory (PRD) which includes organizations that have been onboarded to our platform and committed to keeping their profile information updated. We are able to ingest 2-1-1 information. In Iowa, we work with the United Way of the Midlands to create a comprehensive resource directory.
- **Assistance Request Form:** A public-facing enrollment form that allows individuals to securely self-refer to connect with a provider that meets their needs. This form gathers the necessary demographic and need-related information from the client to connect them with care in accordance with their documented consent.
- **Interoperability Capabilities:** Unite Us offers a suite of interfaces and integration tools including support for modern application programming interfaces (APIs), data extract products, secure authentication frameworks (OAuth 2.0, SAML 2.0, SCIM), and industry data exchange standards (HL7 v2, FHIR, and SMART).
 - **Integrations with Case Management systems:** We offer out-of-the-box integrations with many third-party applications and data sources, including Salesforce, Epic, Cerner, eClinicalWorks, and VirtualHealth. Embedding our platform into these systems of record, provides streamlined workflows and data access for informed decision making to best support an individual in crisis.
- **Dashboards and reporting:** Our technology collects structured client, referral, and outcomes data from all activity logged by participating providers. As a result of this structured data collection, we can meaningfully report on needs and success at both the client-level and the network-level. Client-level reporting is available through our Data Delivery Product, which can be offered daily or in other cadences, as appropriate and in accordance with applicable law. Network-level reporting is available through the Insights Center.
- **Insights Center:** The Insight Centers displays visual representations of the data and information shared through the technology. These are shared in dashboards and reports. For example, the Insights Center includes the Network Activity Dashboard.
 - **The Network Activity** data report provides detailed, aggregate, de-identified metrics on the volume of activities and interactions within a network, including services requested and resources available in the network. It also provides network-level, aggregate data that enable users to understand demographics of clients served what services these clients seek, whether the clients have received their requested services, and how organizations within the network have served client needs.
- **Payments:** Embedded within our referral workflow, our Payments solution enables CBOs to be reimbursed for the important services they are already providing by facilitating service-level tracking, reporting, and billing of community care provided. With simple workflows and electronic claims, Payments **streamline services and payments** between funders and community organizations. The solutions are natively integrated with our core referral functionality and are accompanied by corresponding dashboards and reports that provide powerful insights into all service delivery activities specific to contracted CBOs.

5.7.5 References from three (3) previous customers or clients knowledgeable of the Respondent's performance in providing goods and/or services similar to the goods and/or services described in this solicitation and a contact person and telephone number for each reference.

[Redacted]

5.7.6 Description of experience managing subcontractors, if the Respondent proposes to use subcontractors.

Unite Us will not utilize subcontractors in the performance of any work under this RFP.

Section 5: Key Personnel

The Respondent will provide resumes for all key personnel involved in providing the goods and/or services contemplated by this solicitation. The following information will be included in the resumes:

5.8.1 Full name.

5.8.2 Education.

5.8.3 Years of experience and employment history, particularly in relation to the solicitation's specifications.

Resumes for all key personnel involved in the goods and/or services contemplated by this solicitation have been included in **Appendix B - Unite Us Resumes**. These Unite Us employees are also listed in the next question as "Service Providing Team."

5.8.4 Illustrate the lines of authority in two tables:

- One showing overall operations
- One showing staff who will provide services under this RFP

Overall Operations

Unite Us 2025 Org Chart



Service Providing Team

Name	Job Title	Project Role
Brian Longo (virtual)	Assoc. VP of Enterprise Services	Implementation Support
Emily Kaplan (virtual)	Assoc. Director, Implementation	Implementation Lead
Natalie Hammond-Paul (virtual)	Assoc. VP of Customer Success	Customer Success Support
Angela Renken (virtual)	Customer Success Executive	Customer Success Lead
MJ Pierce (virtual)	Manager, Customer Education	User Training
Mila Enriquez-DiJohn (virtual)	Solutions Delivery Director	Data Delivery Specialist

Section 6: RFP Forms

The forms listed below are attachments to this RFP. Fully complete and submit these forms in Section 6:

- ***Attachment #1: Respondent Information***
- ***Attachment #3: Subcontractor Disclosure Form***

Please see Attachment #1 on the subsequent page. Unite Us will not be using subcontractors; therefore, we are not providing Attachment #3.

Attachment #1: Respondent Information

Primary Contact Information (an individual who can address issues re: this Proposal)	
Name:	Desmond Wilcox
Address:	217 Broadway, Floor 8, New York, NY 10007
Tel:	(817) 395-2426
Fax:	n/a
E-mail:	legal@uniteus.com ; desmond.wilcox@uniteus.com
Respondent Detail	
Business Legal Name (“Respondent”):	Unite USA Inc.
“Doing Business As” names, assumed names, or other operating names:	Unite Us
Parent Corporation Name and Address of Headquarters, if any:	Unite USA Inc., 217 Broadway, Floor 8, New York, NY 10007
Form of Business Entity (i.e., corp., partnership, LLC, etc.):	Corporation
State of Incorporation/organization:	Delaware
Primary Address:	217 Broadway, Floor 8, New York, NY 10007
Phone:	(844) 786-4838
Local Address (if any):	n/a
Addresses of Major Offices and other facilities that may contribute to performance under this RFP/Contract:	n/a
Number of Employees:	501
Number of Years in Business:	13
Primary Focus of Business:	Software as a solution
Federal Tax ID:	46-1914165
UEI #:	J6MDAT5FY9S1
If the Respondent is currently registered to do business in Iowa, provide the Date of Registration:	Doing business in Iowa since 9.30.2020, including the certificate as an Appendix D in our Technical Response.
Do you plan on using subcontractors if awarded this Contract? {If “YES,” submit Attachment 2 - Subcontractor Disclosure Form for each proposed subcontractor.}	No

Appendix A - Marketing Materials

Disaster Relief

Uniting Communities in Times of Crisis

The Urgency of Disaster Relief

Disasters do not discriminate. In fact, 91% of congressional districts include a county that has received a federal disaster declaration for an extreme weather event between 2011 and 2023, according to a recent [report](#) gathered from FEMA and US census data.

Disaster recovery starts immediately after an event. As residents begin the process of rebuilding their communities, seeking assistance should be a positive step forward, alleviating stress rather than adding to it. For government agencies and organizations aiding in the relief effort, this is a chance to build trust through open communication and transparency. Effective recovery relies on collaboration among all parties.

“After the response is over, it is the local community that lives with the decisions made during the incident. Therefore, communities should have a say in how a disaster response occurs.”

FEMA, 2010

Community Up for Success

This is where Unite Us comes in. Unite Us is uniquely positioned to support state and local partners, as well as their residents, even before disaster strikes. Through our nation-wide network, local service providers are already connected and collaborating with their communities, ready to activate disaster relief programs during and after emergencies.

Our Service Types



- **Benefits Navigation (e.g. ID/ Documentation Assistance)**
- **Clothing and Household Goods**
- **Food Assistance**
- **Housing and Shelter (e.g. Emergency Housing, Home Expense Assistance/ Repairs, Rent/Mortgage Payment Assistance)**
- **Income Support**
- **Individual and Family Support (e.g. Interpretation Services, Social Services Case Management)**
- **Mental/Behavioral Health**
- **Utilities**
- **Transportation**

Unite Us has quickly stepped in to support communities across America facing challenges from wildfires, heat events, hurricane relief, and more.



Relief Efforts

Hurricane Ian (2022)

Within 24 hours, Unite Us established a closed-loop referral system for state agencies and community organizations that supported 12,778 residents impacted by Hurricane Ian. The prompt implementation was crucial, offering onsite assistance at Disaster Recovery Centers and improving data delivery to enhance disaster response and funding allocations.

The Unite Us team collaborated with state and federal agencies, including FEMA, in:

- Emergency Operations Centers
- Local Disaster Recovery Centers

This partnership established a model for integrating emergency response with Unite Us' infrastructure to enhance community resilience and address health-related social needs.

Hurricane Idalia (2023)

Drawing from previous hurricane experience, the Unite Us Rapid Response Team effectively leveraged local provider networks during Hurricane Idalia in 2023. Unite Us assisted 3,231 residents in accessing the urgent care they needed, focusing on:

- Food assistance
- Housing and shelter
- Individual and family support
- Physical health
- Benefits navigation

Oregon Heat Events & Wildfires

In 2024, excessive heat and wildfires in Oregon severely affected communities, leading to evacuation orders and health risks from extreme temperatures and smoke.

During two such events in Oregon, one partner informed Unite Us of their need to launch new disaster response programs in order to intake residents impacted by excessive heat and wildfires, and connect them to assistance. In less than four hours, the Unite Us team turned around:

- A custom disaster-related unmet needs assessment
- Two Assistance Request Forms (ARF) that routed to each partner's case management team
- A Unite Us website landing page to host one ARF
- A custom QR Code to use in marketing materials
- A custom step-by-step guide for staff and volunteers using Unite Us to manage these cases

Overall, the program would go on to support 4,203 Oregon residents.

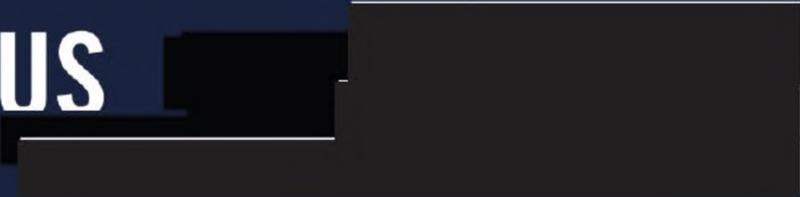
Be Ready with Unite Us

Unite Us is your committed partner, prepared to assist you when challenges arise as disasters can occur unexpectedly and leave communities vulnerable. Together, we can create a safer, stronger community prepared to face any obstacle.

Appendix B - Unite Us Resumes



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Appendix C - Attachment 6

Attachment 6

Desired Data Elements—preference is for all of these to be searchable parameters

- Household Address
 - Ability to validate address would be ideal
- Applicant's Name
- County
- Disaster event
- Provider (Community Agency)
- Client Identifier
- Auto-generated case number
- Expense categories
 - Temporary housing
 - Food assistance
 - Personal property
 - Home repair
- Status
 - Case Status
 - Recovery Plan
 - Needs Assessment
- Tier of need (currently using 4 tiers or categories of need)
- Assistance workplan descriptions
- Reviewed for quality assurance

Yes, Unite Us provides the above data elements in our solution, and has the ability to provide the Desired Data Elements back to the state in the form of our Recurring Data Delivery solution which is composed of multiple person-level files. Currently, the only search fields users can utilize in the CLR Platform are FN, LN, DOB.

Case Creation Process

- Process Steps
 - Initial screening (online submission of a screening form)
 - Intake, if client passes screening (online intake form)
 - May lead to grant application
 - Has ability to save answers to form before submitting
- Applications and case information covers entire household (HH)
- Total Income is for the HH, with the ability to record income by each HH member
- Each HH member's name should be included with the case
- A HH may be affected by multiple disasters over time
- Each case must include:
 - Case notes
 - Dynamic recovery plan

PUBLIC COPY

- Needs assessment
- IIAGP status
- Referral
- Resource tracking
- Documents assigned to a client's case can be viewed when the case is opened by a user with proper Permission.
 - Uploaded documents cannot be altered
 - Comments regarding an uploaded document can be stored with the case

Yes, our solution can support the proposed Case Creation Process, aside from the resident being able to "save answers to form before submitting". Some of the fields listed in this section are captured as part of the resident record while others will be captured on a custom form that state employees will be able to complete for each case.

Payments—Agency seeks these capabilities.

- Track reimbursement requests from contracted providers by disaster and county
- Track fund requests to Executive Council
- Each Case must show amount requested, granted and paid

Yes, Unite Us tracks all fund requests. Depending on the configuration of RBAC for the Executive Council, they will have access to these fund requests through the CLR system and/or Insights Center dashboards.

Appendix D - Certificate of Doing Business in Iowa

**IOWA SECRETARY OF STATE
PAUL D. PATE**



CERTIFICATE OF REGISTRATION

Issue Date: 10/7/2025

Name: UNITE USA INC. (490 FP - 643174)

Authorized Date: 9/30/2020

Duration: PERPETUAL

State of Incorporation: DELAWARE

I, Paul D. Pate, Secretary of State of the State of Iowa, custodian of the records of incorporations, certify the following for the corporation named on this certificate:

- a. The entity is registered to do business in this state.
- b. All fees, taxes, and penalties owed to this state have been paid.
- c. The most recent biennial report required has been filed with the Secretary of State.

Certificate ID: **CS312386**

To validate certificates visit:
sos.iowa.gov/ValidateCertificate



Paul D. Pate, Iowa Secretary of State