

Scope of Services & Operational Support Overview

Capture Management Solutions and the Iowa Developmental Disabilities Council

Council-Facing Summary | Prepared August 2026

Executive Summary

Capture Management Solutions provides operational, communications, event management, financial administration, technology, accessibility coordination, database, and project management support to the Iowa Developmental Disabilities Council.

The current arrangement gives the Council access to a cross-functional team. The work includes communications, digital engagement, events, accessibility coordination, finance, project management, technology, database maintenance, public-facing materials, and ongoing coordination.

Capture serves as a working partner to the Council by helping move priorities from planning to execution. Much of this support happens behind the scenes through timelines, follow-up, systems, accessibility logistics, communication planning, and coordination across multiple activities.

This document is intended to support shared understanding. It is not a sales piece and it is not meant to suggest a change in direction. Capture values the partnership with the Council and wants the full Council to have a clear view of the work currently being provided.

Key Point:

The Council does not receive one isolated service or one general staff role. The partnership provides access to multiple specialized skills through one coordinated support model.

Contracted Position Allocations

The contract identifies the following position categories and allocation percentages. These percentages are shown as contract allocations, not as one-to-one assignments to specific people. Actual service delivery is coordinated across Capture team members based on the work needed.

Contract Position Listed	Allocation
Primary Marketing & Design Manager	60%
Account Manager - Digital	60%
EVP of Marketing & Communications	20%
EVP of Operations and Finance	10%
Account Manager - Events	30%
Account Manager - Internal Office	10%

These allocations help explain why the current scope includes more than administrative support. The contract provides access to communications, design, digital, finance, event, strategic, and internal office capacity.

Current Estimated Staff Capacity

The following updated estimates show the average monthly Capture staff time currently associated with Council work. These estimates are included to help Council members understand the amount and range of support behind the contract.

Capture Team Member	Primary Contribution	Estimated Hours / Month
Heather Grillot	Account management, weekly coordination with Brooke, project oversight, staff coordination, conference coordination, Council meeting attendance when requested	67
Emily Koss	Communications, marketing, website updates, social media, publications, surveys, database support, campaign implementation	90
Heidi Heinz	Event coordination, webinar setup and hosting support, registration logistics, speaker coordination, accessibility coordination, on-site support	55

Capture Team Member	Primary Contribution	Estimated Hours / Month
Alison Seligman	Event operations leadership, quality assurance, onsite management support, process improvement, and special projects	15
Lane Till	Executive account leadership, strategic planning, program development, client relationship management, issue escalation, staff leadership, contract oversight, and conference strategy	10
Ken Lingen	Financial management, vendor payments, invoice support, and financial reporting	22
Carl Lingen	Executive oversight, organizational strategy, board relations, governance consultation, budget oversight, nonprofit management counsel, financial stewardship, risk management, contract review, quality assurance, and executive client consultation	20
Total	Estimated average monthly Capture staff time	279

What This Means:

At 279 estimated hours per month, the work represents approximately 3,350 annual hours of support. More importantly, those hours are spread across multiple specialties rather than concentrated in one generalist role.

How the Current Support Model Works

- **Project and account management:** weekly coordination, status reporting, timeline management, task assignment, follow-up, and Council meeting support when requested.
- **Communications and digital engagement:** email communications, social media, website updates, public-facing materials, surveys, publications, campaign support, and outreach lists.
- **Events, webinars, trainings, and accessibility:** registration setup, Zoom links, webinar hosting support, speaker coordination, ASL interpreter coordination, event reminders, recordings, and follow-up.
- **Make Your Mark! Conference management:** planning timeline, sponsor and exhibitor coordination, attendee registration, venue logistics, speaker communication, hotel scholarship tracking, surveys, awards, shirts, and on-site details.

- **Financial and administrative support:** approved purchases, vendor payments, event expenses, exhibitor booth payments, budget tracking, invoice support, and related reporting.
- **Technology, database, and systems support:** website, event calendar, Zoom, survey tools, registration systems, file systems, contact database, and distribution lists.
- **Executive and strategic support:** senior-level guidance, contract oversight, issue escalation, quality assurance, and strategic consultation when needed.

Role-by-Role Summary

Heather Grillot: Account Management, Project Management, and Conference Coordination

- Conducts weekly touch-base calls with Brooke.
- Creates weekly reports summarizing completed work and upcoming needs.
- Takes notes during weekly meetings and assigns follow-up tasks to the Capture team as needed.
- Oversees project deadlines and helps coordinate staff work.
- Serves as Make Your Mark! Conference Coordinator, including exhibitor and sponsor coordination, attendee registration, venue coordination, and overall conference tracking.
- Attends Council meetings when requested.

Emily Koss: Communications, Marketing, Website, and Database Support

- Creates and sends email communications, reminders, and follow-up messages.
- Develops and schedules social media content.
- Updates the website and events calendar.
- Creates promotional materials for webinars, listening sessions, grants, events, and conference activities.
- Supports publications, public policy materials, graphics, surveys, and campaign outreach.
- Assists with contact database and list management as needed.

Heidi Heinz: Events, Webinars, Trainings, and Accessibility Coordination

- Coordinates logistics for webinars, Zoom meetings, trainings, listening sessions, and in-person events.
- Supports registration setup and event reminders.
- Secures ASL interpreters for many webinars, Zoom meetings, trainings, listening sessions, and in-person events.
- Supports speaker communication, technical setup, and day-of execution.
- Provides on-site event support when Capture support is needed.

Alison Seligman: Event Operations and Strategic Event Support

- Provides event operations oversight and guidance for major Council events and conferences.
- Assists with event planning strategy, timeline development, and implementation tracking.
- Reviews event processes and recommends improvements to increase efficiency and effectiveness.
- Assists with onsite event management and troubleshooting as needed.
- Supports quality assurance review of event plans, materials, and operational processes.

Lane Till: Executive Leadership, Client Strategy, and Account Oversight

- Serves as a point of escalation for strategic or operational issues.
- Advises on strategic planning, program development, organizational priorities, and governance matters.
- Supports overall contract implementation and alignment with Council goals.
- Provides leadership and direction to the Capture team assigned to the Council account.
- Assists with conference strategy, stakeholder engagement, and special initiatives.

Ken Lingen: Financial Management and Administration

- Processes accounts payable and vendor payments.
- Manages invoicing and payment tracking.
- Assists with exhibitor, sponsor, registration, and event-related payment processing.
- Maintains financial records and supporting documentation.
- Prepares routine financial reports and reconciliations.
- Coordinates with Capture staff and vendors regarding financial transactions and questions.

Carl Lingen: Executive Oversight and Financial Stewardship

- Provides executive oversight for the Council engagement.
- Offers strategic guidance and consultation related to nonprofit management and organizational sustainability.
- Reviews financial performance and budget status to help ensure sound fiscal stewardship.
- Provides counsel on financial planning, risk management, and long-term organizational considerations.
- Supports quality assurance and accountability across contracted services.
- Assists with contract oversight and executive-level problem resolution when needed

Current Scope of Services

1. Project Management and Executive Support

- Weekly planning and coordination meetings with Brooke.
- Weekly activity reports that summarize completed work, upcoming deadlines, questions, and follow-up items.
- Project timeline tracking across communications, events, grants, surveys, State Plan activities, and conference planning.
- Task assignment and staff follow-up so multiple workstreams continue moving forward.
- Council meeting attendance when requested.

2. Communications, Marketing, and Public Relations

- Email communications for events, grants, webinars, surveys, listening sessions, public policy activities, and public comment opportunities.
- Social media content, graphics, scheduling, reminders, event photos, and post-event content.
- Website updates, including events, calendars, recordings, public materials, links, and resource updates.
- Press release writing and distribution support.
- Publication design, formatting, and production support.
- Plain-language public-facing materials that explain Council initiatives.

3. Event, Webinar, Training, and Listening Session Management

- Zoom links, registration forms, reminders, and event promotion.
- Webinar and virtual meeting hosting support when needed.
- ASL interpreter coordination and related accessibility logistics.
- Speaker communication, technical setup, recordings, follow-up emails, and attendance tracking.
- Website and event calendar updates.

4. Make Your Mark! Conference Management

- Overall conference planning, timeline management, and logistics tracking.
- Exhibitor, sponsor, attendee, speaker, volunteer, award, hotel scholarship, shirt, and survey coordination.
- Venue coordination, presentation proposal forms, selected speaker communication, and promotional support.
- Conference website, email, social media, reporting, and post-event feedback support.

5. Accessibility and Inclusion Support

- ASL interpreter coordination for many webinars, Zoom meetings, trainings, listening sessions, and in-person events.
- Accessibility-related logistics for events and materials.
- Support for virtual accessibility considerations such as platform setup and meeting process.

6. Survey and Feedback Administration

- Survey setup and administration through tools such as SurveyMonkey or Tally.
- Survey distribution through email, website, and other communication channels.
- Response tracking and results preparation for Council review when requested.

7. State Plan and Public Input Support

- The Council writes the State Plan. Capture formats the plan and prepares the final document.
- Capture supports listening sessions, public comment surveys, Zoom setup, interpreter coordination, communications, and promotion when requested.

8. Database and Contact Management

- Maintains the Council contact database and communication lists.
- Updates contact information and adds contacts from registration or public engagement activities when appropriate.
- Supports targeted outreach lists for events, webinars, grants, public comment, and legislative activities.

9. Financial and Administrative Support

- Processes approved payments and purchases.
- Supports vendor payments, event expenses, registration payments, meeting food orders, and exhibitor booth payments when requested.
- Tracks budget categories and supports invoicing and reporting.

Scope Clarification: Nonprofit Management

Formal management of the nonprofit itself is not included in the current scope of services. Capture currently provides in-kind guidance, continuity support, or nonprofit management counsel as part of its working partnership with the Council, but formal nonprofit management is a separate service need.

Making Invisible Work Visible

A significant amount of Capture’s value is in the coordination steps behind each public-facing activity. From the outside, a Council member may see one webinar, one Capitol Day, or one listening session. Internally, each activity requires work across communications, technology, accessibility, registration, database management, follow-up, and reporting.

Example: One Capitol Chat Webinar

Before	During	After
Create Zoom link and registration; update website and calendar; create graphics; draft and send emails; promote on social media; secure ASL interpreter; coordinate speaker details; monitor registration; send reminders.	Host Zoom; admit and support attendees; coordinate interpreter logistics; provide technical support; record the session; support presenters.	Post recording; update website; send follow-up email; share recording; update database and attendance records; archive materials; support reporting.

Example: One In-Person Capitol Advocacy Day

Before	During	After
Promote by email and social media; update website; assist with registration or coordination; order food if applicable; prepare logistics and reminders.	Provide on-site support when requested; take photos; troubleshoot needs; support Council staff and participants.	Post photos; share social media updates; send follow-up communications if needed; support reporting and records.

A Year in the Life of the Council

Category	Examples of Capture Support
Ongoing	Weekly meetings, weekly reports, website updates, database updates, social media, communication planning, budget tracking, and project follow-up.
Recurring public engagement	Capitol Chats, listening sessions, webinars, trainings, public policy communications, public comment opportunities, and survey distribution.
Legislative and advocacy activities	Capitol Advocacy Days, legislative meetings, public policy event support, outreach materials, press releases, and approved event expenses.
Make Your Mark! Conference	Conference planning, speaker outreach, presentation proposal forms, registration, sponsors, exhibitors, venue coordination, communications, surveys, accessibility needs, and logistics.
Annual survey and reports	Survey setup, distribution, reminders, results tracking, and report support.
State Plan activities	Final document formatting, listening session support, public input opportunities, and posting or promoting materials.

Technology and Systems Supported

- Website and event calendar management.
- Zoom setup and hosting support.
- Survey platforms such as SurveyMonkey or Tally.
- Contact database and communication lists.
- Registration and event-related systems.
- File sharing and document management systems used for Council work.
- Graphic design, publication, and marketing tools used to support Council communications.

Financial Context

The fiscal year 2026 budget shows a total Council contract budget of \$275,000. That figure includes more than staff time. It also includes technology, database and license costs, event management, marketing and collateral, and general operating costs.

Budget Category	FY26 Budgeted	Notes
Administrative support	\$180,110	Includes Capture staff support categories.
Marketing / collateral	\$12,000	Includes items such as printing, postage, and collateral.
Event management	\$53,967	Includes event-related support categories.
Database / license	\$28,248	Includes systems such as database, website hosting, Zoom, and related tools.
General operating costs	\$675	Includes general operating items.
Total	\$275,000	Total FY26 budget shown in the budget file.

Important Comparison Note:

The contract budget should not be compared only to staff time. A full understanding of the partnership also includes software, databases, website hosting, survey tools, registration systems, event systems, vendor costs, supervision, training, and transition of institutional knowledge.

Partnership and Continuity

The purpose of this overview is to show the full Council the breadth of work currently being handled through the Capture partnership. The work is broad, detailed, and often behind the scenes, but it is all connected to helping the Council communicate clearly, host accessible events, manage public input, support the Make Your Mark! Conference, and keep ongoing work moving forward.

Capture values the relationship with the Iowa DD Council and is committed to providing support that is accurate, practical, responsive, and aligned with the Council's mission and priorities.

Iowa DD Council Project Support Examples

This supplement identifies specific Council projects and the Capture support connected to those projects.

Grant Management

- Capture Management Solutions provides the following grant management including spin down reports, being a fiscal officer, and monitoring grants on behalf of IDDC.
 - Capitol Day Grants: \$3,000
 - Town Hall Advocacy Grants: \$2,000
 - Voter Education Grants: \$1,500
- Capture Management Solutions works with end recipients of grants for payments and reimbursements.

Magazine Design and Printing

- Capture Management Solutions develops, designs, and prints an annual magazine for IDDC to highlight advocacy and work completed throughout the year.
- Magazine cost: \$7,000 | Capture Match: \$3,500

Project-to-Capture Support Matrix

Council project / initiative	Project type	Capture support
Capitol Day Grants	Grant management	Spin-down reporting; fiscal officer support; grant monitoring; payment and reimbursement coordination with end recipients.
Town Hall Advocacy Grants	Grant management	Spin-down reporting; fiscal officer support; grant monitoring; payment and reimbursement coordination with end recipients.
Voter Education Grants	Grant management / voting awareness	Grant monitoring; payment and reimbursement coordination; support for disability vote and voter education awareness activities.
Council Magazine	Public awareness / publication	Development, design, printing coordination, and production of the annual magazine highlighting advocacy and Council work.
Workday With My Legislator / NDEAM	Employment awareness campaign	Campaign support connected to National Disability Employment Awareness Month; communications and related project coordination.
Disability Vote / Voting Campaigns	Voting awareness campaign	Campaign support for disability voting awareness, outreach, and related communications.
Other employment-related awareness campaigns	Employment awareness campaign	Campaign support for employment-related awareness efforts as identified by the Council.

Note: This chart is intended to show project-to-service connections. It does not allocate staff time or provide a project accounting report.