

**Metropolitan Transportation Commission  
Administration Committee**

**April 12, 2023**

**Agenda Item 2b**

**Consultant Bench: 2020 Equity Consultant - Cycle 2: Acterra: Action for a Healthy Planet (dba Acterra); Ann Ming Jen Cheng (dba Ann Cheng Consulting, LLC); Ascendal Group, LLC; Davis R. Schwartz (dba Capital Partnerships Inc.); Baird + Driskell + Abrams Community Planning (dba Community Planning Collaborative Baird + Driskell Community Planning); Dante King (dba Dante King Consulting); Equity & Results Partners, Inc.; Estolano Advisors; EVNoire LLC; HNTB Corporation; Lisa Abboud (dba InterEthnica, Inc.); iSuccess Consulting, Inc.; Jacobs Engineering Group Inc.; Keen Independent Research LLC; KPMG LLP; Metropolitan Planning Group (dba M-Group); Moore Iacofano Goltsman, Inc.; Nova Collective LLC; Sam Schwartz Consulting, LLC; SF Urban Film Fest, Inc.; Social Good Fund, Inc; Steer Davies & Gleave Inc. (dba Steer); STV Incorporated; Sustainable Watershed Designs, Inc. (dba Lotus Water); Brenda W. Davis (dba The Brenda Davis Law Group); The Justice Collective LLC; Transpo Group USA, Incorporated (dba Transpo Group); Venture With Purpose, LLC; Corinne Winter (dba Winter Consulting Group)**

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**Subject:**

Approval of a pre-qualified bench of consultants to provide as-needed equity consulting services, as summarized in Attachment A (“Equity Bench”), through June 30, 2025, with an option to extend for two (2) additional years through June 30, 2027.

**Background:**

MTC is working towards further incorporating equity into its operations and portfolio of work on a wide range of agency and project-specific matters. In December 2020, the Administrative Committee was provided with an update on the activities and informed that staff would be issuing a Request for Qualifications (RFQ) to seek on-call equity services to support MTC’s work program. Through this RFQ, MTC is seeking equity services to advance our equity platform and increase access for staff to a diverse group of thought leaders in this space. This memorandum provides an update on those efforts and seeks approval of the recommended consultants based on the responses to Cycle 2 of the 2020 Equity Consultant Assistance RFQ.

Given the wide range of desired proficiencies and experience, and the amount and complexity of MTC's work program, there is a need for broad and deep access to equity focused thought leaders. The scope of services outlined in the RFQ, therefore, covers a large body of work.

**Procurement Process:**

MTC issued the RFQ for the 2020 Equity Consultant Assistance – Cycle 2 (RFQ – Cycle 2) on December 12, 2022. RFQ invited firms to submit Statements of Qualifications ("SOQ") for one or more of the following five service categories:

1. Internal Operations
2. Investments and Policy
3. Community and Partner Engagement
4. Innovation
5. Environmental Justice

Email notification of the RFQ – Cycle 2 opportunity was sent to over 8,200 individuals, community-based organizations (CBOs) and firms. Staff hosted a pre-proposal conference on December 22, 2022, via Zoom, which provided opportunities for the Small and Disadvantaged Business Enterprises (SBE /DBE) and larger firms to ask questions about upcoming project opportunities and about the contract process. Sixty-two (62) individuals attended the conference. Staff also took steps to encourage participation from SBE/DBEs, and CBOs, by conducting outreach early in the process and simplifying complex contracting requirements as follows:

- Communications about the upcoming RFQ were sent out via the Executive office, the Accessibility, Culture, and Racial Equity (ACRE) office, the Policy Advisory Council, and over LinkedIn.
- Contracting requirements were simplified to encourage SBE/DBEs and CBO participation. This involved omitting minimum qualifications and simplifying required qualifications and insurance requirements.

Records indicate that 111 individuals or firms downloaded the RFQ – Cycle 2 and related documents. On January 18, 2023, MTC received 32 SOQs from firms, many of which applied to more than one service category, as shown in the table below:

Category	Number of Total Applicants	Number of DBE Applicants*	Number of SBE Applicants*
1. Internal Operations	21	3	5
2. Investments and Policy	17	5	6
3. Community and Partnership Engagement	21	3	5
4. Innovation	21	3	3
5. Environmental Justice	16	4	6
<b>TOTAL</b>	<b>32</b>	<b>5</b>	<b>9</b>

\*NOTE: DBE firms may also be SBE firms and vice versa.

Separate evaluation panels for each service category comprised of MTC staff from various sections reviewed SOQ's based upon the following evaluation criteria:

- |    |  |            |
|----|--|------------|
| 1. | Experience and qualifications of the firm and proposed staff | 60%        |
| 2. | Reasonableness of rates                                      | 25%        |
| 3. | Presentation   | <u>15%</u> |
|    | Possible Total:  | 100%       |

For each service category, the firms that the evaluation panel recommends for inclusion on the Cycle 2 of the Equity Bench are indicated with a number "1" in Attachment A. All recommended firms demonstrate expertise in the service category(ies) for which they were selected and provide a mix of local and national experience and expertise that will be valuable in helping MTC and local agencies advance equity in the Bay Area. Firms which are not recommended for inclusion on the Bench for a particular service category are indicated by the number "0" in Attachment A. The firms recommended for bench approval in this memorandum are in addition to the firms already authorized by the Administration Committee as a result of the

first cycle of the RFQ. A summary of each firm's SBE/DBE status is listed by service category on Attachment B.

Any firms approved in Cycle 2 of the Equity Bench will be eligible for work throughout the approved term. Contract periods of performance and amounts will be determined on a per-contract basis based on the project solicited to Cycle 1 or Cycle 2 of the Equity Bench. Staff will return to the Administration Committee for authorization of any contracts exceeding the Executive Director's signature authority.

Cooperative use language included in the RFQ allows other public entities to utilize firms on the Equity Bench for their own equity projects and programs.

**Issues:**

None identified.

**Recommendation:**

Staff recommends that the Administration Committee approve the pre-qualified consultants identified in Attachment A for the Cycle 2 of Equity Bench to provide equity consultant assistance services in the specified categories on an as-needed basis, for a period through June 30, 2025, with an option to extend for two (2) additional years through June 30, 2027.

**Attachments:**

- Attachment A: List of Pre-Qualified Panel of Consultants for Cycle 2 of the 2020 Equity Consultant Bench – List of Firms and Service Categories
- Attachment B: Disadvantaged Business Enterprise and Small Business Enterprise Status
- Attachment C: Request for Committee Approval – Summary of Proposed Consultant Bench



Andrew B. Fremier

**Attachment A: 2020 Equity Consultant Assistance- Cycle 2 List of Firms and Service Categories**

	<b>FIRM NAME</b>	<b>A. Internal Operations</b>	<b>B. Investments and Policy</b>	<b>C. Community and Partner Engagement</b>	<b>D. Innovation</b>	<b>E. Environmental Justice</b>
<b>1</b>	Acterra: Action for a Healthy Planet (dba Acterra)	1	0	1	0	1
<b>2</b>	Ann Ming Jen Cheng (dba Ann Cheng Consulting, LLC)	1	1	1	1	1
<b>3</b>	Ascendal Group, LLC	0	-	-	1	-
<b>4</b>	Davis R. Schwartz dba Capital Partnerships Inc.	1	0	-	0	-
<b>5</b>	Baird + Driskell + Abrams Community Planning (dba Community Planning Collaborative Baird + Driskell Community Planning)	1	1	1	0	1
<b>6</b>	Dante King (dba Dante King Consulting)	1	0	0	0	-
<b>7</b>	Equity & Results Partners, Inc.	1	1	-	0	1
<b>8</b>	Estolano Advisors	1	1	1	-	1
<b>9</b>	EVNoire LLC	0	0	0	1	0

	FIRM NAME	A. Internal Operations	B. Investments and Policy	C. Community and Partner Engagement	D. Innovation	E. Environmental Justice
10	Floor 23 Digital LLC	-	-	0	0	-
11	HNTB Corporation	-	1	1	1	1
12	Lisa Abboud (dba InterEthnica, Inc)	-	1	1	-	1
13	iSuccess Consulting, Inc.	1	-	-	-	-
14	Jacobs Engineering Group Inc.	-	1	0	1	1
15	Keen Independent Research LLC	1	0	-	-	0
16	KPMG LLP	1	0	0	0	0
17	MBA Growth Partners	0	-	0	0	-
18	Metropolitan Planning Group (dba M-Group)	-	-	1	-	1
19	Moore Iacofano Goltsman, Inc	1	-	1	0	1
20	Nova Collective LLC	1	-	-	-	-
21	PH Adams & Associates	0	-	-	0	0

	FIRM NAME	A. Internal Operations	B. Investments and Policy	C. Community and Partner Engagement	D. Innovation	E. Environmental Justice
22	Sam Schwartz Consulting, LLC	1	1	1	0	1
23	SF Urban Film Fest, Inc.	0	-	1	-	-
24	Social Good Fund, Inc.	-	0	1	-	1
25	Steer Davies & Gleave Inc (dba Steer)	-	1	-	1	1
26	STV Incorporated	1	0	-	0	-
27	Sustainable Watershed Designs, Inc. (dba Lotus Water)	-	-	1	1	-
28	Brenda W. Davis (dba The Brenda Davis Law Group)	1	-	0	-	-
29	The Justice Collective LLC	1	-	1	-	-
30	Transpo Group USA, Incorporated (dba Transpo Group)	-	-	-	1	-
31	Venture With Purpose, LLC	1	-	1	-	1
32	Corinne Winter (dba Winter Consulting Group)	-	-	1	-	-
	Total Number of Accepted Applicants	21	17	21	21	16

	FIRM NAME	A. Internal Operations	B. Investments and Policy	C. Community and Partner Engagement	D. Innovation	E. Environmental Justice
	Total Number of Accepted Prime DBE Firms*	3	5	3	3	4
	Total Number of Accepted Prime SBE Firms*	5	6	5	3	6



Attachment B

Disadvantaged Business Enterprise and Small Business Enterprise Status

Service Category A: Internal Operations		DBE		SBE	
Role	Firm Name	DBE* Yes / No	If DBE Yes, List #	SBE** Yes / No	If SBE Yes, List #
Prime	Acterra: Action for a Healthy Planet (dba Acterra)	No		No	
Sub	Redwood Resources	Yes	42714	Yes	2023419
Prime	Ann Ming Jen Cheng (dba Ann Cheng Consulting, LLC)	Yes	50250	Yes	2021866
Prime	Davis R. Schwartz dba Capital Partnerships Inc.	No		No	
Prime	Baird + Driskell + Abrams Community Planning (dba Community Planning Collaborative Baird + Driskell Community Planning)	No		Yes	2024582
Sub	Catalyze Silicon Valley	No		No	
Sub	Greenbelt Alliance	No		No	
Sub	San Jose State University's Institute of Metropolitan Studies	No		No	
Sub	Schafran Strategies	No		No	
Sub	Housing Choices	No		No	

Service Category A: Internal Operations		DBE		SBE	
Sub	SEEDS Community Resolution Center	No		No	
Prime	Dante King (dba Dante King Consulting)	No		No	
Sub	Full Cycle Doula Services LLC	No		No	
Prime	Equity & Results Partners, Inc.	No		No	
Prime	Estolano Advisors	Yes	42483	Yes	2002042
Prime	iSuccess Consulting, Inc.	No		No	
Prime	Keen Independent Research LLC	No		No	
Prime	KPMG LLP	No		No	
Prime	Moore Iacofano Goltsman, Inc.	No		No	
Sub	Redwood Resources	Yes	42714	Yes	2023419
Prime	Nova Collective LLC	No		No	
Prime	Sam Schwartz Consulting, LLC	No		No	
Sub	Redwood Resources	Yes	42714	Yes	2023419
Sub	Equitable Cities Consulting, LLC	No		No	
Prime	SVT Incorporated	No		No	
Sub	Redwood Resources	Yes	42714	Yes	2023419
Prime	The Justice Collective LLC	No		No	
Prime	Venture With Purpose, LLC	No		No	

Service Category B: Investments and Policy		DBE		SBE	
Role	Firm Name	DBE* Yes / No	If DBE Yes, List #	SBE** Yes / No	If SBE Yes, List #
Prime	Ann Ming Jen Cheng (dba Ann Cheng Consulting, LLC)	Yes	50250	Yes	2021866
Prime	Baird + Driskell + Abrams Community Planning (dba Community Planning Collaborative Baird + Driskell Community Planning)	No		Yes	2024582
Sub	Catalyze Silicon Valley	No		No	
Sub	Greenbelt Alliance	No		No	
Sub	San Jose State University's Institute of Metropolitan Studies	No		No	
Sub	Schafran Strategies	No		No	
Sub	Housing Choices	No		No	
Sub	SEEDS Community Resolution Center	No		No	
Prime	Equity & Results Partners, Inc.	No		No	
Prime	Estolano Advisors	Yes	42483	Yes	2002042
Prime	EVNoire LLC	Yes	48684	No	
Prime	HNTB Corporation	No		No	

Service Category B: Investments and Policy		DBE		SBE	
Prime	Lisa Abboud (dba InterEthnica, Inc)	No		Yes	57042
Prime	Jacobs Engineering Group Inc.	No		No	
Sub	Mariposa Planning Solutions	Yes	49323	No	
Sub	Silicon Valley Independent Living Center	No		No	
Sub	Emergent labs	No		No	
Sub	Leshner Planning & Transportation	No		Yes	2026935
Prime	Sam Schwartz Consulting, LLC	No		No	
Sub	Redwood Resources	Yes	42714	Yes	2023419
Sub	Equitable Cities Consulting, LLC	No		No	
Prime	Steer Davies & Gleave Inc (dba Steer)	No		No	

Service Category C: Community and Partner Engagement		DBE		SBE	
Role	Firm Name	DBE* Yes / No	If DBE Yes, List #	SBE** Yes / No	If SBE Yes, List #
Prime	Acterra: Action for a Healthy Planet (dba Acterra)	No		No	
Sub	Redwood Resources	Yes	42714	Yes	2023419

Service Category C: Community and Partner Engagement		DBE		SBE	
Prime	Ann Ming Jen Cheng (dba Ann Cheng Consulting, LLC)	Yes	50250	Yes	2021866
Prime	Baird + Driskell + Abrams Community Planning (dba Community Planning Collaborative Baird + Driskell Community Planning)	No		Yes	2024582
Sub	Catalyze Silicon Valley	No		No	
Sub	Greenbelt Alliance	No		No	
Sub	San Jose State University's Institute of Metropolitan Studies	No		No	
Sub	Schafran Strategies	No		No	
Sub	Housing Choices	No		No	
Sub	SEEDS Community Resolution Center	No		No	
Prime	Estolano Advisors	Yes	42483	Yes	2002042
Prime	HNTB Corporation	No		No	
Prime	Lisa Abboud (dba InterEthnica, Inc)	No		Yes	57042
Prime	Metropolitan Planning Group (dba M-Group)	No		No	
Prime	Moore Iacofano Goltsman, Inc.	No		No	

Service Category C: Community and Partner Engagement		DBE		SBE	
Sub	Redwood Resources	Yes	42714	Yes	2023419
Prime	Sam Schwartz Consulting, LLC	No		No	
Sub	Redwood Resources	Yes	42714	Yes	2023419
Sub	Equitable Cities Consulting, LLC	No		No	
Prime	SF Urban Film Fest, Inc.	No		No	
Prime	Social Good Fund, Inc.	No		No	
Sub	Silicon Valley Independent Living Center	No		No	
Prime	Sustainable Watershed Design, Inc. (dba Lotus Water)	No		Yes	1223180
Prime	The Justice Collective LLC	No		No	
Prime	Venture With Purpose, LLC	No		No	

Service Category D: Innovation		DBE		SBE	
Role	Firm Name	DBE* Yes / No	If DBE Yes, List #	SBE** Yes / No	If SBE Yes, List #
Prime	Ann Ming Jen Cheng (dba Ann Cheng Consulting, LLC)	Yes	50250	Yes	2021866
Prime	Ascendal Group, LLC	No		No	

Service Category D: Innovation		DBE		SBE	
Prime	EVNoire LLC	Yes	48684	No	
Prime	HNTB Corporation	No		No	
Prime	Jacobs Engineering Group Inc.	No		No	
Sub	Mariposa Planning Solutions	Yes	49323	No	
Sub	Silicon Valley Independent Living Center	No		No	
Sub	Emergent labs	No		No	
Sub	Leshner Planning & Transportation	No		Yes	2026935
Prime	Steer Davies & Gleave Inc (dba Steer)	No		No	
Prime	Sustainable Watershed Design, Inc. (dba Lotus Water)	No		Yes	1223180
Prime	Transpo Group USA, Incorporated (dba Transpo Group)	No		No	
Sub	Taskar Center for Accessible Technology	No		No	

Service Category E: Environmental Justice		DBE		SBE	
Role	Firm Name	DBE* Yes / No	If DBE Yes, List #	SBE** Yes / No	If SBE Yes, List #
Prime	Acterra: Action for a Healthy Planet (dba Acterra)	No		No	

Service Category E: Environmental Justice		DBE		SBE	
Sub	Redwood Resources	Yes	42714	Yes	2023419
Prime	Ann Ming Jen Cheng (dba Ann Cheng Consulting, LLC)	Yes	50250	Yes	2021866
Prime	Baird + Driskell + Abrams Community Planning (dba Community Planning Collaborative Baird + Driskell Community Planning)	No		Yes	2024582
Sub	Catalyze Silicon Valley	No		No	
Sub	Greenbelt Alliance	No		No	
Sub	San Jose State University's Institute of Metropolitan Studies	No		No	
Sub	Schafran Strategies	No		No	
Sub	Housing Choices	No		No	
Sub	SEEDS Community Resolution Center	No		No	
Prime	Equity & Results Partners, Inc.	No		No	
Prime	Estolano Advisors	Yes	42483	Yes	2002042
Prime	HNTB Corporation	No		No	
Prime	Lisa Abboud (dba InterEthnica, Inc)	No		Yes	57042
Prime	Jacobs Engineering Group Inc.	No		No	



Service Category E: Environmental Justice		DBE		SBE	
Sub	Mariposa Planning Solutions	Yes	49323	No	
Sub	Silicon Valley Independent Living Center	No		No	
Sub	Emergent labs	No		No	
Sub	Leshner Planning & Transportation	No		Yes	2026935
Prime	Metropolitan Planning Group (dba M-Group)	No		No	
Prime	Moore Iacofano Goltsman, Inc.	No		No	
Sub	Redwood Resources	Yes	42714	Yes	2023419
Prime	Sam Schwartz Consulting, LLC	No		No	
Sub	Redwood Resources	Yes	42714	Yes	2023419
Sub	Equitable Cities Consulting, LLC	No		No	
Prime	Social Good Fund, Inc.	No		No	
Sub	Silicon Valley Independent Living Center	No		No	
Prime	Steer Davies & Gleave Inc (dba Steer)	No		No	
Prime	Venture With Purpose, LLC	No		No	
Prime	Corinne Winter (dba Winter Consulting Group)	No		No	

\*Denotes certification by the California Unified Certification Program (CUCP).

\*\*Denotes certification by the State of California

## Request for Committee Approval

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### Summary of Proposed Consultant Bench

Work Item No.:	To be determined on a per-contract basis
Consultants:	See Attachment B to the Administration Committee Summary Sheet dated April 12, 2023
Work Project Title:	2020 Equity Consultant Assistance – Cycle 2
Purpose of Project:	Provide as-needed equity consulting services to support MTC
Brief Scope of Work:	<p>Provide as-needed equity consulting assistance in the following service categories:</p> <ol style="list-style-type: none"><li>1. Internal Operations</li><li>2. Investments and Policy</li><li>3. Community and Partner Engagement</li><li>4. Innovation</li><li>5. Environmental Justice</li></ol>
Project Cost Not to Exceed:	To be determined on a per-contract basis.
Funding Source:	To be determined on a per-contract basis.
Fiscal Impact:	No immediate fiscal impact until contracts are awarded. Funds for future fiscal years are subject to agency budgetary approval process.
Motion by Committee:	That the consultants listed in Attachment A to the Administration Committee Summary Sheet dated April 12, 2023, be pre-qualified to enter into contracts with MTC to provide as-needed equity consulting services through June 30, 2025, with an option to extend for an additional two years to June 30, 2027, as described above and in the Administration Committee Summary Sheet dated March 10, 2021 subject to applicable contract approval procedures and necessary budget approvals.
Operations Committee:	<hr/> Gina Papan, Chair
Approved:	April 12, 2023