



City of Culver City

RFP No. 2406 — Racial Equity Consultant
A. Cover Page

Prepared for:

Human Resources Department
City of Culver City
9770 Culver Boulevard
Culver City CA 90232-0507

October 16, 2023

Prepared by:

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C. Executive Summary

The City of Culver City is looking to develop and implement a Racial Equity Action Plan (REAP) to increase racial equity across all City operations. The REAP will include both short- and long-term goals and initiatives and will draw upon substantial engagement from members of the community and City staff.

Firm Background and Experience

Founded in 2011, Keen Independent is a 24-person equity research and consulting firm with extensive experience conducting analyses involving racially, culturally and linguistically diverse communities for public agencies throughout the country. Our team members have substantial experience providing recommendations and assisting with and providing guidance on implementation of racial equity-related strategic plans based on assessment findings.

Our team has completed more than 200 equity assignments that include recommendations for improving racial equity internally and externally. Our studies provide clients with the tools to measure progress over time and the guidance to implement recommendations across all internal and external operations.

Qualifications of Personnel

All members of the Keen Independent study team offer expertise and many years of experience in racial equity research, research methodology, development and implementation of DEI-related strategic action plans and extensive stakeholder engagement.

Qualifications of key team members. Key personnel have recently prepared racial equity-related plans for public organizations such as the Orange County Transportation Authority, the City of Tacoma and the City of Milwaukie in Oregon, among many others. Keen Independent worked with the Center for Economic Inclusion to develop a racial equity tool that gauges the economic impact of proposed legislature bills on people of color. In addition, key personnel have extensive experience coordinating and conducting outreach and engagement with diverse stakeholders and other community members. The following staff members will be assigned to the City of Culver City REAP assignment. (See resumes in Section 2.)

- **David Keen** co-founded Keen Independent in 2011. He has directed or participated in more than 180 equity studies and his national leadership includes pioneering a court-approved methodology and testifying as an expert witness successfully defending equity programs in court.
- **Annette Humm Keen** co-founded Keen Independent in 2011. She has worked on more than 80 equity studies and is known for designing inclusive stakeholder engagement strategies and facilitating productive stakeholder conversations on difficult topics.
- **Janine Kyritsis** is the qualitative research lead on current firm DEI and discrimination/disparity projects. She has experience with more than 70 equity studies.
- **Dr. Nicole Yates** (Southern California-based) has conducted extensive quantitative and qualitative analyses for equity studies including Santa Clara County, California and City of Milwaukie, Oregon.
- **Dr. Vivien Lattibeaudiere** has extensive experience with program development and implementation as well as training and learning development for public agencies.
- **Blanca Monter** has extensive experience addressing workforce equity and labor market reform for more than 60 equity studies with the firm and in her prior roles.
- **Haley Adams** (Southern California-based) played a key role in a number of equity studies and facilitated DEI training sessions.

Services Offered

We detail our services offered in Section V of this proposal. An overview of our scope of work is below.

Phase 1 (baseline assessment):

1. Project initiation and management;
2. Review of policies, programs and procedures;
3. Workforce analysis;
4. Preliminary identification of highest priorities.
5. Internal stakeholder engagement.

Phase 2 (REAP development):

6. Community engagement;
7. Racial Equity Action Plan (REAP) development; and
8. Implementation support.

Additional Information

There are no exceptions to this request for proposal.

D. Questionnaire/Response to Scope of Services

Keen Independent is pleased to present our responses to all questions in the Questionnaire section of the Request for Proposals.

A. Company and General Information

Keen Independent's company information is provided below.

- Official registered name: Keen Independent Research, LLC
- Address: 100 Fillmore Street, 5th Floor
Denver, CO 80206

The Letter of Transmittal is provided on the following page.



- Research
- Analysis
- Strategy
- Implementation

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October 16, 2023

Onyx Jones
Assistant City Manager
City of Culver City Human Resources Department
9770 Culver Boulevard
Culver City, CA
90232

Re: Racial Equity Consultant RFP #2406

Dear Onyx:

Keen Independent Research LLC (Keen Independent) is pleased to submit this proposal in response to the City of Culver City Racial Equity Consultant RFP. Keen Independent is a 24-person equity research and consulting firm. We have an office in Phoenix and staff from Boston to Southern California. Two key staff members on the proposed study team are in the Los Angeles area. Our team performs diversity, equity and inclusion (DEI) evaluations, including assessments focused on racial equity, and related work for public entities nationally.

Keen Independent's study team members have performed similar research to develop equity plans and guide implementation for clients throughout the country. Our work includes equity assessments for large organizations such as the City of Salt Lake City, Arizona Department of Education and the City of Tacoma. We also have been successful with public organizations of similar size and scope of services as the City of Culver City, including the City of Milwaukie, Oregon (a suburb of Portland of similar population as Culver City) and Delray Beach, Florida (a city of similar size in South Florida).

We have experience recommending and conducting DEI training as well. For example, our work for Salem Area Mass Transit District included an internal assessment and delivery of 24 DEI training sessions for employees and leadership. The training sessions covered core topics related to diversity, equity and inclusion as well as a background regarding the benefits of DEI to an organization and the differences between DEI and EEO laws. Staff throughout the organization were encouraged to participate in a group discussion following each session.

Our extensive experience in California includes projects for Orange County Transportation Authority, North County Transit District, City of San Jose and Santa Clara County. We are also currently completing market research and feasibility studies for the City of Corona, Melrose Theater and the North Coast Repertory Theatre.

Primary contact. Keen Independent’s primary point of contact for the City of Culver City Racial Equity Consultant will be David Keen, Principal.

David Keen’s contact information is provided below.

- Phone: (303) 522-7298
- Email: dkeen@keenindependent.com

Keen Independent has read and will comply with all terms and conditions of the RFP.

We are looking forward to discussing this proposal with you.

Sincerely,



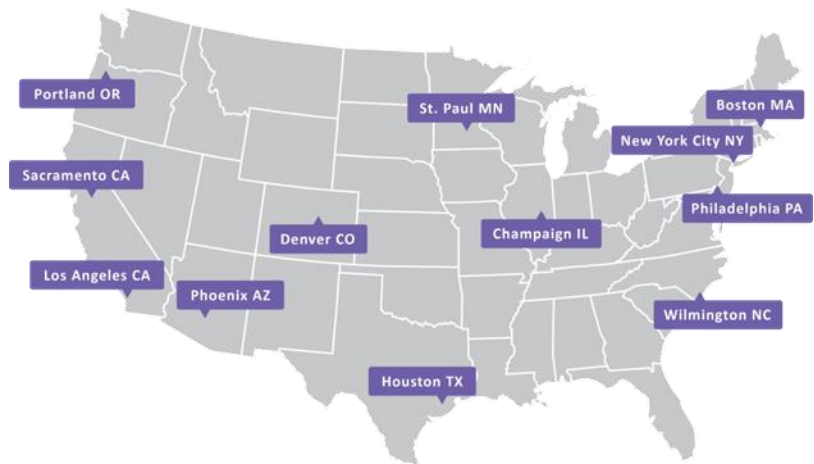
David J. Keen
Principal

B. Qualifications and Experience of the Firm

Keen Independent is pleased to submit our firm qualifications and experience for the Culver City Racial Equity Action Plan (REAP) assignment.

Firm History

Founded in 2011, Keen Independent Research LLC is a national research and consulting firm that performs work for public, private and nonprofit clients. Principals Dave Keen and Annette Humm Keen have over three decades of experience performing research for public agencies. Firm projects for public sector clients include assessing workplace climate and culture issues, program review, analysis of workforce and customer data, quantitative and qualitative research, and development of diversity, equity and inclusion strategies and implementation plans. Our company combines nationally recognized research expertise with experience helping our clients implement changes based on our findings.



Our projects assisting with the development and implementation of racial equity-related strategic action plans that include evaluation metrics are grounded in our extensive experience in and understanding of diversity, equity and inclusion. The firm prides itself on our expertise in evaluating and providing recommendations for improving diversity, equity and inclusion both internally with staff and leadership, and externally, with members of the community. Collectively, we have completed more than 200 equity assignments that include recommendations for improving the elements of DEI internally and externally, methods to measure improvement over time and assistance with implementation and training.

Our company has offices in Phoenix and Denver, and employs staff across the country, from Los Angeles to New York City. The Keen Independent team is comprised of 24 individuals, each with research experience relevant to the Culver City REAP assignment.

We employ staff with degrees in policy analysis, economics, sociology, planning and related fields. Our staff also have proficiency in multiple languages to support engagement with diverse communities.

Organizational Structure

Figure D-1 below shows the organization of the entire Keen Independent firm including key team members. We have the staffing capabilities to ensure that our study team has the support and assistance needed to meet all deadlines and deliverables. Keen Independent invests in extensive cross-training on specialized skills to ensure that we are able to shift resources as needed to complete assignments.

Study team members offer expertise and many years of experience in workforce analyses, racial equity research, research methodology, development and implementation of DEI-related actions plans as well as stakeholder engagement and DEI best practices. Multiple team members are fluent in Spanish, which allows us to easily provide surveys and interviews in Spanish and English.

D-1. Study team organization



Project Team

Staff roles and experience. Introduced below are the key personnel assigned for this project, including their primary roles and highlights of their qualifications. Detailed resumes follow this section.

- **David Keen, Principal**, will serve as project manager, primary principal contact and will oversee all aspects of this assignment. David co-founded Keen Independent in 2011 after serving as Managing Director of a consulting firm for 22 years, where he started and led the company's equity study practice. His national leadership includes pioneering a court-approved methodology and testifying as an expert witness successfully defending equity programs in court. He has directed or participated in more than 180 equity studies.
- **Annette Humm Keen, Principal**, will develop recommendations, direct study communications and direct quality assurance and quality control (QA/QC). Annette co-founded Keen Independent in 2011. Her 25-year professional background includes a national practice with more than 80 equity studies for public and nonprofit organizations. She is known for designing inclusive stakeholder engagement strategies and facilitating productive stakeholder conversations on difficult subjects. Annette has trained and mentored all Keen Independent staff on inclusive research methods.
- **Janine Kyritsis, Chief Listening Officer**, will lead qualitative analysis. Janine is the qualitative research lead on current firm diversity, equity and inclusion and discrimination/disparity projects. She has experience with more than 80 equity studies including extensive qualitative research experience related to analyses of in-depth interviews, public meetings and anecdotal information.
- **Dr. Nicole Yates, Keen Independent Consultant** is located in Los Angeles and will be the project expeditor on this assignment, meaning she is responsible for ensuring the project runs on schedule. Dr. Yates will conduct research and analysis and lead training sessions. Her experience includes conducting quantitative and qualitative analyses for equity studies including Santa Clara County Parks and Recreation, Oregon Mental Health Regulatory Agency and City of Milwaukie, Oregon. For Santa Clara County Parks and Recreation, Dr. Yates is currently serving as project expeditor.
- **Blanca Monter, Senior Consultant**, will lead quantitative research. Blanca has extensive experience addressing workforce equity and labor market reform including more than 60 equity studies with Keen Independent and in her prior roles with the Mexican Ministry of Finance and Mexican Ministry of Communications and Transportation. Blanca is fluent in Spanish.
- **Dr. Vivien Lattibeaudiere, Consultant**, will support training roadmap recommendation development and will conduct virtual training sessions with study participants. Vivien brings 30 years of training and equity program experience to the Keen Independent project team. She has extensive experience with program development and implementation as well as training and learning development for state agencies and institutions of higher education.
- **Haley Adams, Consultant**, will conduct research and analysis and support the development of recommendations for the City of Culver City. Haley played a key role in equity-related studies for Arizona Department of Education, Des Moines Water Works, Orange County Transit Authority and Salt Lake City. For Salem Area Mass Transit District, she facilitated 24 DEI training sessions for employees and leadership.



DAVID KEEN

KEEN INDEPENDENT PRINCIPAL

David Keen co-founded Keen Independent in 2011 after serving as Managing Director of a Denver-based consulting firm for 22 years, where he started and led the company's equity study practice. David has three decades of experience directing equity studies. He has also served as an adjunct faculty member at the University of Denver and is a frequent speaker and author on equity issues.

Years of Experience: 30+

Years with Firm: 12

Education

M.C.R.P., City and Regional Planning, Harvard University, Cambridge, MA

B.S., Business Administration, University of Arizona, AZ

Highlights

Directed/participated in 180+ equity studies

Served as an expert witness and unnamed expert in defense of equity programs

Led a Title VI assessment, program development and training for state and local agencies.

Testified on workforce DEI issues before a state legislative committee

Professional Affiliations

Served on Committee on Contracting Equity, Transportation Research Board

Relevant Project Experience

DEI Strategy | Orange County Transportation Authority, CA (2022)

Equity Study | Downtown San Diego Partnership Contract Equity Analysis and Supplier Diversity Program, CA (2021)

DEI Consulting | Metropolitan Water District of Southern California, CA (2019)

Workforce Development | work2future, CA (2022)

Disparity Study | California Department of Transportation, CA (2016)

Disparity Study | Metropolitan Transit System, CA (2009)

DEI Consulting and Training | Salem Area Mass Transit District, OR (2022)

DEI Strategic Plan | City of Milwaukie, OR (2023)

EIB Plan | City of Salt Lake City, UT (2023)

DEI Strategic Plan | Des Moines Water Works, IA (2022)

Workforce Equity Study | City of Tacoma, WA (2019)

Diversity and Inclusion Resource Guide | Transportation Research Board (2021)

Racial Impact Equity Notes | Center for Economic Inclusion, MN (2022)

Publications

Resource Guide for Improving Diversity and Inclusion Programs for the Public Transportation Industry, Transit Cooperative Research Program, Transportation Research Board, 2021

Professional Skills

- Equity and workforce studies
- Market research
- Strategic planning
- Expert witness testimony
- Public policy analysis
- Project management
- DEI programs and initiatives
- Program development



ANNETTE HUMM KEEN

KEEN INDEPENDENT PRINCIPAL

Annette Humm Keen is a Principal of Keen Independent. She launched Keen Independent with David Keen in 2011. In addition to leading equity studies, she is responsible for quality assurance/quality control (QA/QC). She has been an educator and research partner in local, regional and national collaborations regarding disparities in contracting, workforce, training, public service delivery and other fields.

Years of Experience: 25+

Years with Firm: 12

Education

M.L.A., Harvard University, Cambridge, MA

B.A., Anthropology, St. John's University, New York, NY

Highlights

Participated in 80+ equity studies including those with significant community engagement

Featured speaker at the *Mayor's Conversation on Economic Equity* in New Orleans, conducted with Mayor Mitch Landrieu, New Orleans, 2018

Served as Chairperson of a recreation provider, where she advocated for diversity and equity in service delivery

Multiple presentations to national and regional industry groups regarding equity programs and related studies

Relevant Project Experience

Disparity Study | North County Transit District, CA (2022)

Equity Study | Santa Clara County Parks, CA (2023)

DEI Strategy | Orange County Transportation Authority, CA (2022)

DEI Strategic Plan | Metropolitan Water District of Southern California, CA (2019)

Access and Equity Program Evaluation | Dane County Parks and Zoo, WI (2022)

EIB Plan | City of Salt Lake City, UT (2023)

DEI Strategic Plan and Consulting | Salem Area Mass Transit District, OR (2022)

Workforce Equity Study | City of Tacoma, WA (2019)

DEI Strategic Plan | City of Milwaukie, OR (2023)

Diversity and Inclusion Assessment | Maryland-National Park and Planning Commission, MD (2019)

Racial Equity Impact Notes | Center for Economic Inclusion, MN (2022)

Equity Study | Community Transit, WA (2023)

Equity Study (including wastewater) | New Castle County, DE (2022)

Publications

Compendium of Successful Practices, Strategies and Resources in the FHWA Disadvantaged Business Enterprise (DBE) Program, National Cooperative Highway Research Program, Transportation Research Board

Professional Skills

- Disparity study methodology
- Equity programs
- Business development
- Public policy analysis
- Workforce development
- QA/QC
- Diversity and inclusion programs
- Project management
- Strategic planning



JANINE KYRITSIS

KEEN INDEPENDENT CHIEF LISTENING OFFICER

Janine Kyritsis is responsible for providing firm-wide strategic planning, listening externally to client needs and internally to team needs. She is also responsible for firm marketing and business development initiatives. She continues to support current firm projects as the qualitative research lead, where she analyzes in-depth interviews, public meetings and other anecdotal information for studies.

Years of Experience: 25+

Years with Firm: 12

Education

M.S., Counseling and College Student Development, Long Island University, New York, NY

B.A., Anthropology/Sociology, St. John's University, New York, NY

Highlights

Led qualitative, utilization and availability analyses for 80+ equity studies

Served as a Quality Assurance Consultant to the U.S. Department of Education in Washington, D.C. to develop policies on institutional compliance

Managed multi-million-dollar state, federal and private dollars including fiscal reporting and facilitating of on- and off-campus work-study programs in the New York City metro area

Relevant Project Experience

DEI Strategy | Orange County Transportation Authority, CA (2022)

DEI Consulting | Metropolitan Water District of Southern California (2022)

Market Research and Message Testing | Santa Clara Valley Water District, CA (2021)

EDI Strategy | Arizona Department of Education, AZ (2022)

DEI Strategic Plan | Des Moines Water Works, IA (2022)

EIB Plan | City of Salt Lake City, UT (2023)

DEI Plan and Training | Salem Area Mass Transit District, OR (2022)

Diversity and Inclusion Assessment | Maryland-National Capital Park and Planning Commission, MD (2019)

Equity and Access Program Evaluation | Dane County Parks and Zoo, WI (2022)

Workforce Equity | City of Tacoma, WA (2019)

Disparity Study | Caddo-Bossier Parishes Port Commission, LA, (2022)

Diversity and Inclusion Resource Guide | Transportation Research Board (2021)

Publications

Resource Guide for Improving Diversity and Inclusion Programs for the Public Transportation Industry, Transit Cooperative Research Program, Transportation Research Board, 2021

Professional Skills

- Diversity, equity and inclusion studies
- Qualitative research and analysis
- Quality assurance/quality control
- Education-related studies
- Data management
- Quantitative analysis
- Strategic planning
- Project management



DR. NICOLE YATES

KEEN INDEPENDENT CONSULTANT

Dr. Nicole Yates joined Keen Independent as a researcher with a passion for creating equitable educational and employment opportunities for historically marginalized groups. She seeks to utilize her analytical and interpersonal skills to execute inclusive initiatives in organization management.

Years of Experience: 10

Years with Firm: 1

Education

Ph.D., Urban Education Policy,
University of Southern
California, Los Angeles, CA

M.A., Psychology, Stanford
University, Stanford, CA

B.A., Drama, Stanford
University, Stanford, CA

Professional Affiliations

Secretary of the Board of
Directors, Conundrum Theatre
Company, Burbank, CA

Journal Submission Reviewer,
*Learning and Individual
Differences*

Alumni interviewer, Stanford
Alumni Association

Former mentor, Upward Bound,
Los Angeles, CA

Former soloist, Choral Arts
Society of Washington

Relevant Project Experience

DEI Strategic Plan | City of Milwaukie, OR (2023)

Equity Study | Santa Clara County Parks, CA (2023)

Workforce Development | work2future, San Jose, CA (2023)

Workplace Climate Assessment | Dane County, WI (2023)

Market Analysis and Community Engagement | Melrose Theatre, Los Angeles, CA (2023)

Market Analysis and Community Engagement | City of Corona, CA (2023)

Internal Equity Assessment | Community Transit, WA (2023)

DEI Strategic Plan | Des Moines Water Works, IA (2022)

DEI Consulting | Salem Area Mass Transit District, OR (2022)

Diversity Audit | Oregon Mental Health Regulatory Agency, OR (2022)

Equity Study | Caddo-Bossier Parishes Port Commission, LA

Equity Study | City of Shreveport, LA (2023)

Operational Analysis | Clark State College, OH (2023)

Publications

Promoting an agentic orientation: An intervention in university psychology and physical science courses, Journal of Educational Psychology, 2022

Exploring the relationship between Black students' external regulation and intrinsic motivation, Motivation and Emotion, 2021

Professional Skills

- Diversity, equity and inclusion studies
- Statistical and regression analysis
- Strategic planning
- Educational policy
- Project management
- Program evaluation
- Community outreach
- Focus group facilitation
- Survey development



BLANCA MONTER

KEEN INDEPENDENT SENIOR CONSULTANT

Blanca Monter conducts statistical and regression analyses and evaluates marketplace data for Keen Independent studies. She has substantial experience conducting equity and inclusion studies for public and private entities spanning more than 60 projects. Blanca also has 15 years of experience in program management, public policy, data collection and analyses. She is fluent in Spanish.

Years of Experience: 15

Years with Firm: 7

Education

M.P.P., University of Minnesota, Minneapolis, MN

M.A., Public and Social Politics, Universitat Pompeu Fabra, Barcelona, Spain

B.A., Economics, Instituto Tecnológico Autónomo de México, Mexico City, Mexico

Highlights

Participated in 60+ equity studies

Provided litigation support regarding overconcentration analysis in the successful defense of the Federal DBE Program (*Geyer Signal, Inc. and Kevin Kissner v. Minnesota Department of Transportation, et al.*)

Provided data analysis for the defense in the case *GEOD Corporation et al. Plaintiffs v. New Jersey Transit Corporation, et al.*

Relevant Project Experience

DEI Strategic Plan | City of Milwaukie, OR (2023)

DEI Strategy | Orange County Transportation Authority, CA (2022)

Equity Study | North County Transit District, CA (2022)

Workforce Development | City of San Jose and work2future, CA (2022)

DEI Strategic Plan and Consulting | Salem Area Mass Transit District, OR (2022)

Diversity and Inclusion Assessment | Maryland-National Park and Planning Commission, MD (2019)

DEI Strategic Plan | Des Moines Water Works, IA (2022)

Equity and Access Program Evaluation | Dane County, WI (2022)

Workforce Equity Study | City of Tacoma, WA (2019)

EIB Plan | Salt Lake City, UT (2023)

Racial Impact Equity Notes | Center for Economic Inclusion, MN (2022)

Publications

Compendium of Successful Practices, Strategies and Resources in the FHWA Disadvantaged Business Enterprise (DBE), National Cooperative Highway Research Program, Transportation Research Board

Professional Skills

- Equity studies
- Statistical and regression analysis
- Litigation support
- Data collection
- Project management
- Strategic planning
- Diversity and inclusion
- Quality control
- Economic policy analysis



DR. VIVIEN LATTIBEAUDIERE

KEEN INDEPENDENT SENIOR CONSULTANT

Dr. Vivien Lattibeaudiere is a visionary leader with a track record of successful implementation of innovative strategies and reform in government agencies, colleges, universities and nonprofit organizations. She has expertise in coalition building, stakeholder engagement and equity programs such as the federal Disadvantaged Business Enterprise Program.

Years of Experience: 30

Years with Firm: < 1

Education

Ph.D., Higher Education Administration and Leadership, University of Tennessee, Knoxville, TN

M.A., Community and Applied Psychology, Fairleigh Dickinson University, Teaneck, NJ

B.A., Psychology, Fairleigh Dickinson University, Teaneck, NJ

Highlights

Created a nationally recognized Transportation Professional Civil Rights Certification Program

Awards

Western Association of Highway Officials Civil Rights Innovation Award

Harvard University John F. Kennedy Foundation Innovation Award

National Association of County Executives Award for Leadership and Innovation

National Office of Substance Abuse Recognition for Leadership and Coalition Building

Relevant Project Experience

Equity Program Design and Implementation | Clark County School District, NV (2023)

Equity Program Design and Implementation | University of Washington (2023)

DEI Training | Salem Area Mass Transit District, OR (2022)

Disparity Study | Contract Administrator, Arizona Department of Transportation (ADOT) (2015, 2020)

Availability Study | Contract Administrator, ADOT (2014, 2017)

Training Videos for Business Coach on Demand Website | Contract Administrator, Arizona Department of Transportation (2018)

Relevant Work Experience

Administrator, Employee & Business Development Office | Arizona Department of Transportation

Manager, Business Engagement & Compliance Office | Arizona Department of Transportation

Director, Engineering Consultants Services | Arizona Department of Transportation, AZ

CEO/Co-Founder | VHL Consulting, AZ

Program Coordinator | Arizona State University

Executive Director, Office of the County Executive | New Castle County Government, DE

Professional Skills

- Strategic planning and analysis
- Stakeholder engagement
- Business development
- Contract management
- Coalition building
- Professional development
- Economic development
- Benchmarking and data analysis
- Training
- Organization development
- Cost control



HALEY ADAMS

KEEN INDEPENDENT CONSULTANT

Haley Adams is one of the firm’s qualitative research and Geographic Information Systems (GIS) specialists with fluency in mixed research methods and geospatial software including ArcGIS Pro, ArcMap and ArcGIS Online. She applies these tools as part of Keen Independent’s equity and disparity studies. Haley has proficiency in Spanish and Russian, as well as an interest in linguistics.

Years of Experience: 5

Years with Firm: 2

Education

M.S., in Geographic Information Systems, Arizona State University, Tempe, AZ

B.A., Geography, Arizona State University, Tempe, AZ

B.A., History, Arizona State University, Tempe, AZ

Highlights

Performed qualitative analysis of stakeholder interviews and business ownership research nationwide.

Coordinated 24 DEIB training sessions and hosted two training sessions for the Salem Area Mass Transit District

Project Experience

EDI Strategy | Orange County Transit Authority, CA (2022)

Equity Study | North County Transit District, CA (2022)

DEI Plan and Training | Salem Area Mass Transit District, OR (2022)

Equity Study | City of Columbia, SC (2022)

EDI Strategy | Arizona Department of Education, AZ (2023)

DEI Strategic Plan | Des Moines Water Works, IA (2023)

Equity and Access Program Evaluation | Dane County, WI (2022)

Diversity and Inclusion Assessment | Maryland-National Capital Park and Planning Commission, Washington, D.C. (2020)

Diversity Audit | Oregon Mental Health Regulatory Agency, OR (2022)

Equity Study | Arizona Department of Transportation (2020)

Equity Study | Oregon Department of Transportation (2019)

Equity Study | Oregon Department of Aviation (2020)

Equity Study | State of Colorado (2020)

Equity Study | City of St. Louis and St. Louis County, MO (2023)

Professional Skills

- Diversity, equity, inclusion and belonging studies
- Disparity studies
- Survey development
- Master planning
- Spatial statistics and modeling
- Site selection
- Qualitative research
- Project management
- Subconsultant coordination

Firm Experience

Keen Independent provides firm qualifications related to those outlined in the RFP below.

Community engagement. Many of the agencies we partner with request internal policy review and analysis as well as recommendations for fostering a better relationship with the communities they serve, including the underrepresented and underserved. The Keen Independent team prides itself on our facilitation expertise and ability to effectively build relationships with diverse populations. Each year, Keen Independent manages thousands of telephone, online, intercept and other survey responses from members of diverse groups. Keen Independent combines rigorous research methods (in-depth interviews, focus groups, survey research, ethnography and statistical analysis) with community outreach and engagement strategies tailored to each assignment. Our entire team is trained in culturally conscious and inclusive research methods and maintains up-to-date knowledge of equity-related research methods.

Our success in engaging the public stems from using multi-pronged outreach, which regularly generates widespread public participation. The study team has substantial experience engaging diverse populations within various communities throughout the country. Keen Independent employs staff who are fluent in other languages, including Spanish. Our team has experience facilitating research in additional languages as needed to meet the needs of specific clients and the communities they serve. We take into consideration stakeholders' level of comfort in sharing information and always present qualitative and quantitative data in aggregate to maintain anonymity. Additionally, we offer multiple avenues for stakeholders to participate in our studies.

The following are examples of internal stakeholder and community engagement strategies we have used in past studies:

- Keen Independent conducted outreach to diverse stakeholders and other community members throughout Orange County to develop a Diversity, Equity and Inclusion Plan for Orange County Transportation Authority that was completed in 2022. Community members were invited to participate in an online virtual workshop and to share their thoughts and experiences via a study hotline and email address.
- Our team has extensive experience conducting outreach and engagement in multiple languages, frequently conducting written and verbal engagement in Spanish and English. For a City of San Jose Racial Dichotomy Study, Keen Independent performed in-depth research with young adults of immigrant families from the Philippines and Vietnam (with Tagalog- and Vietnamese-speaking staff) as well as from Latin America (in Spanish and English). Our outreach regarding equity and inclusion for Dane County Parks and Recreation included materials in Hmong. We invited the Somali and Hmong communities to participate in our equity research in Minneapolis-St. Paul.
- Our work for Dane County Parks and Henry Vilas Zoo in Madison, Wisconsin involved collaboration with 90 community organizations to reach and engage about 600 people including both parks and zoo users and non-users. Research instruments in English, Spanish and Hmong fostered participation by a demographically representative cross-section of underserved community members.
- In our work with the Salem Area Mass Transit District (SAMTD) Equity and Inclusion Plan, Keen Independent analyzed the results of an online questionnaire with external stakeholders. Respondents provided input regarding their perception of diversity, equity and inclusion in how SAMTD serves the community.

Workplace climate and workforce analysis experience. Keen Independent has conducted workforce research with public sector clients since our founding. Our team developed a workforce disparity methodology to assess whether there are racial or gender disparities in the overall workforce, new hires, promotions and separations. We draw on this methodology in our assessments of equity in the workplace as well to enhance understanding of trends in the workforce.

Our workforce projects have considered the impact of practices in recruitment (e.g., eligibility lists, written tests and pipeline development), retention (e.g., employee resource groups and cultural climate), wage equity, complaint handling and beyond.

Internal stakeholder engagement. We use a variety of methods to engage internal stakeholders to help assess workplace equity, climate and feelings of inclusion and belonging among the workforce. Some of those methods are included in the following:

- In-depth interviews with staff and leadership;
- Focus groups and listening sessions with staff of similar job titles;
- Online virtual workshops; and
- DEI surveys.

Some recent examples that illustrate our experience related to workplace climate and workforce analysis are provided below.

- For the Arizona Department of Education, we analyzed workforce data to determine whether any disparities existed within the workplace. Our team examined workforce, hiring, promotion and separation results to complete the analysis. Keen Independent conducted in-depth interviews and focus groups with ADE employees to assess workplace climate as well.
- For City of Tacoma, we drew on extensive internal stakeholder engagement to result in recommendations related to recruitment, hiring, retention, promotion and staff development. The study team collected qualitative information from internal stakeholders through in-depth interviews, focus groups and other sources to assess workplace climate and any barriers employees face related to equity.

Experience evaluating policies, programs and procedures and providing recommendations. Nearly every study we conduct includes review and analysis of policies, programs and procedures for our public sector clients to assess the ways inequities may be embedded within those systems. We have experience developing detailed policy recommendations including language for ordinances. This has required a deep understanding of both regulatory and legal environments for government entities. Keen Independent carefully develops actionable recommendations that are uniquely tailored to each of our clients' needs.

- Our assessment for the Oregon Mental Health Regulatory Agency included analysis and recommendations related to criminal background check policies and procedures, hiring requirements and other legislated mandates with implications for the state's mental health workforce.

- Our equity, inclusion and belonging plan for Salt Lake City included a comprehensive review and analysis of workforce policies including hiring and promotions processes. The study team also reviewed policies related to workplace climate such as those related to employee training and other related practices. Keen Independent developed recommendations for employee retention, recruitment, hiring and promotions, contracting and procurement, and budgeting processes For the City. The plan also included action steps, timelines and metrics for measuring progress toward goals.
- For the Orange County Transportation Authority (OCTA) DEI Strategy, Keen Independent reviewed and analyzed both internal and external policies and programs. For the internal review, the study team assessed programs related to training and employee growth as well as other general policies. Keen Independent also reviewed externally oriented policies and programs to assess and provide recommendations to increase equity within the community.
- Our work for the City of Milwaukie included an evaluation of workforce policies, programs and procedures as well as recommendations for staff communications.
- For the Maryland-National Capital Park and Planning Commission (M-NCPPC), Keen Independent conducted an equity assessment of M-NCPPC’s policies and workforce. The study team identified specific policies and practices that contributed to disparity or exclusion as well as the outcomes of these policies on businesses and employees. Keen Independent provided recommendations for changes in policies and practices to foster inclusion and equity.

Implementation and training guidance. Many agencies have retained Keen Independent because of our ability to design and implement change in their organizations. This often requires creating and implementing new policies and practices as well as staff training. Keen Independent is capable of developing quality, evidence-based equity plans as well as creating, monitoring and implementing plans.

Experience from past studies has provided the Keen Independent team with a clear understanding of the role municipalities have in advancing diversity, equity and inclusion both internally within the workforce, and externally, within communities. We often aid leadership in identifying roadblocks or reasons why previous efforts may not have achieved their intended goals, as well as practical steps they can take to ensure programs and policies have their desired outcomes. We have the tools and methods to promote inclusion and equity. Examples include:

- Keen Independent developed a comprehensive implementation plan for Orange County Transportation Authority. The study team also developed an equity framework and worksheet for members of leadership to use when developing new policies, programs and procedures. These tools were designed to be used across City operations and over time to measure progress.
- Our equity, inclusion and belonging plan for Salt Lake City included a guide to be used by members of leadership for developing DEI initiatives as well as a series of implementation guidelines. The guide was designed to be used across City operations. The study team also designed a tool to assist with developing long term goals for the City and performance measures for each goal. \

We strive to ensure that strategies and plans are successful long after our contracts have concluded. When implementation support involves coaching and training, we develop customized solutions and equip our clients to sustain efforts over time. For example, Keen Independent has:

- Created customized training and documented training sessions for later reference;
- Provided “train the trainer” sessions for leadership;
- Educated staff on facilitation guidelines; and
- Recommended future trainings and/or coaching sessions.

Experience facilitating structured conversations and training. Keen Independent staff have extensive experience facilitating training sessions and focus groups. Our team members understand the importance of these conversations and have experience facilitating hundreds of such discussions every year for our clients. Our team members are adept at maintaining structured conversations around topics related to equity with internal and external stakeholders and have experience providing training sessions to numerous stakeholder groups. Each member of our team has undergone internal training to learn methods to generate these conversations in a successful manner. Examples include:

- For a supplemental task for the Salem Area Mass Transit District (SAMTD) Diversity, Equity and Inclusion Plan Keen Independent team members hosted 27 DEI training sessions for SAMTD employees and leadership. The study team covered a number of topics related to equity and allowed time for input from training session participants.
- Keen Independent facilitated three virtual focus groups with Des Moines Water Works employees for the Diversity and Inclusion Results and Recommendations project. Topics included background on equity within the utility as well as equity within internal programs and practices.

Keen Independent works to develop strong, collaborative relationships with our clients. We are proud that more than half of our assignments involve repeat clients, many for extended or additional work to support leadership in their implementation efforts.

Knowledge of California and federal laws. Keen Independent specializes in equity research, which requires our firm to maintain a working knowledge of local, state and federal laws pertaining to diversity, equity and inclusion in the workplace. This includes such California laws as Proposition 209, the California Fair Employment and Housing Act, California Equal Pay Act and the recent California Pay Transparency for Pay Equity Act.

Keen Independent examined each of these state and federal legal requirements in a recent DEI study for the Orange County Transportation Authority.

Keen Independent Principal, David Keen, testified as an expert witness in federal district court in the successful defense of Caltrans’ equity programs in the *Associated General Contractors of America, San Diego Chapter, Inc. v. California Department of Transportation, et al.* case in addition to other legal challenges of similar programs.

C. Questions/Response to Scope of Services

Culver City seeks a consultant to develop a Racial Equity Action Plan (REAP) to support the City's continuing efforts to embed racial equity into all facets of the City's operations. A member of the Government Alliance of Race and Equity (GARE), the City has already made significant progress toward its racial equity goals, including substantial reforms of its police force and foregrounding equity goals in the City's General Plan 2045. The next steps in the City's progression toward racial equity may be challenging but will support the City in becoming a place where one's race does not determine their life outcomes.

To assist the City in actualizing its vision, Keen Independent proposes the following tasks outlined in the City's request for proposal:

Phase 1 (baseline assessment):

1. Project initiation and management;
2. Review of policies, programs and procedures;
3. Workforce analysis;
4. Preliminary identification of highest priorities.
5. Internal stakeholder engagement.

Phase 2 (REAP development):

6. Community engagement;
7. Racial Equity Action Plan (REAP) development; and
8. Implementation support.

We describe each task in detail below.

Task 1. Project initiation and management. To ensure that projects run on time and on budget, the Keen Independent study team employs robust project management practices. We provide clients with regular updates and opportunities for input while keeping the administrative responsibilities of advancing the project firmly on ourselves. We understand that City staff time is extremely valuable, and we seek to leverage it in the most impactful ways.

1-a. Project onboarding and kick-off and meeting. Keen Independent will hold an in-person project kick-off meeting with the Culver City project liaisons, which may include members of the Equity and Human Advisory Committee, if appropriate (Keen Independent may also facilitate a separate introductory meeting with this Committee). During this meeting Keen Independent staff (study team) will:

- Provide an overview of the project, including project goals, process, proposed timelines, desired outcomes and deliverables;
- Discuss our theory of change and methodology for reviewing policy, practice and culture/climate through an equity lens;
- Facilitate a discussion of what the City hopes to learn from the effort; and
- Answer any questions the City may have.

1-b. Monthly status reports. Keen Independent will submit a monthly written progress report, which discusses percentage completion of each study component and provides a narrative description of project status by component. Progress status reports are written as support for monthly invoices.

1-c. Monthly project coordination meetings. The study team will meet (virtually) with the City's project liaison(s) at a minimum of once per month to discuss study progress and coordination. Meetings may be scheduled on a more frequent basis if needed and the study team will correspond regularly with the City via email for the duration of the project. At key junctures, the study team will prepare PowerPoint presentations as interim updates.

1-d. Communications. Keen Independent recommends the following communications:

- Culver City should formally announce the study to staff and the public at the start of the project. Keen Independent will assist with drafting the announcement and study fact sheet.
- Keen Independent will create and host a study website, telephone hotline and dedicated study email address to foster ongoing communications with internal and external stakeholders. Individuals who wish to provide feedback directly to the study team may do so via these channels at any point during the study. Keen Independent will follow up on any contacts received.
- At the close of the assignment, Keen Independent will help the City announce results.

Deliverables. Deliverables for Task 1 include:

- Monthly progress reports;
- Study fact sheet; and
- Study website, email address and hotline.

Task 2. Review of policies, programs and procedures. Beginning the project with a review of current policies, programs and procedures creates a foundation for identifying what specific changes may be needed and provides context for subsequent stakeholder research. Keen Independent recommends three areas of focus for this review, each detailed as a subtask below. We will submit data requests for each area of focus.

2-a. Workforce policies, programs and procedures. The Keen Independent study team will request and review policies relating to the City's hiring, promotions, separations, training and workplace conduct. During this review, the study team will consider what policies may contribute positively or negatively to racial equity in the workplace, workplace climate and employees' sense of belonging. The team will also begin the process of identifying gaps in information necessary to understand and monitor DEI progress over time.

As necessary to ensure the study team's understanding of City practices and policies, Keen Independent will request interviews with leadership and other staff from the City's human resources department. We will review past and current strategies for recruiting and retaining a diverse staff and for fostering an inclusive and equitable workplace. We will also gather information about the City's complaints processes, exit interview processes and approach to monitoring workplace climate.

2-b. DEI-relevant policies, programs and procedures. Keen Independent will request and review background information to understand how the City views DEI, including any meeting minutes and work products from relevant committees (e.g., Disability Advisory Committee, Equity & Human Relations Advisory Committee), departmental DEI policies or statements, police reform policy revisions and any documentation

related to the City’s participation in the Government Alliance on Race and Equity (GARE). Keen Independent will work with the City to identify which documents will be included in this analysis.

2-c. Procurement policies, programs and procedures. Keen Independent will request and review any policies, programs and procedures associated with the procurement of goods and services. As needed, we will also interview staff associated with procurement to better understand any challenges or barriers to an equitable distribution of contracts.

Deliverables. Deliverables for Task 2 include:

- Workforce documents request;
- DEI-relevant documents request;
- Procurement documents request; and
- Policy, program and procedure analysis appendix.

Task 3. Workforce analysis. Establishing measurable baseline data on which to build DEI efforts is key to their success. Keen Independent recommends grounding internal DEI assessments and recommendations on a thorough and rigorous assessment of workplace composition. We will review any recent studies of the composition of Culver City’s workforce as well as perform analyses of rates of hiring, promotion and separation by racial and gender group. We can update workforce demographic analysis if Culver City has conducted them or provide them as described below.

Task 3-a. Research on the diversity of the local workforce. Keen Independent will describe the diversity of people working in the types of jobs within the local labor basin that generate applicants for Culver City job openings. Using Census data on workers available in the labor basin for Culver City, the study team will develop benchmarks for City hiring for diverse staff for each major occupational category for the labor basin.

Keen Independent will also examine projections of how the diversity of the applicant pool will change in the future. This information will aid in demonstrating the need to embed diversity, equity, inclusion and belonging principles in advance of a changing workforce.

Task 3-b. Workforce demographic analysis. After reviewing existing EEO-4 reports and other existing City analyses, Keen Independent will work with the City’s HR department staff to plan additional workforce research, if needed. We propose examining:

- The availability of workers of color and women in occupations within each EEO-4 group based on U.S. Census data in the marketplace;
- Whether there are any disparities between the current workforce composition and available workforce; and
- Whether there are any disparities between recent hires and workers available to be hired.

We recommend these analyses using five years of employment information (2017 to 2022), including applicant flow data, to determine the City’s overall workforce, hiring, promotions and separations by race/ethnicity and gender.

Task 3-c. Synthesis of workforce information. Following our analyses, Keen Independent will synthesize all workforce information in a report-ready appendix. We will include preliminary recommendations based on our assessment.

Deliverables. Deliverables for Task 3 include:

- Prior workforce analysis request (if applicable);
- Workforce data request; and
- Workforce analysis appendix.

Task 4. Preliminary identification of highest priorities. To ensure that our areas of focus in upcoming tasks are aligned with the City’s vision and expectations, Keen Independent will conduct a preliminary listening session with City leadership. During this session, we will discuss some of our findings from previous tasks with leadership and ask for their input on where the City should focus its equity-related efforts. Our goal in this session is to facilitate a conversation about what the City’s greatest areas of focus in terms of racial equity should be given where the City currently is.

Keen Independent will work with the City’s project liaison to determine the attendees for this session (we imagine this session would include members of the Equity and Human Relations Advisory Committee). We have local staff who can conduct this session in person but can also facilitate the session virtually, if preferred. The study team will use information gathered in this session to inform the questions we ask stakeholders in future research tasks as well as our overall recommendations for the REAP.

We note that other staff will have opportunities to participate in listening sessions and interviews in subsequent tasks.

Deliverables. We will briefly summarize what we learned from the listening session in a memo that we will provide for the City’s project liaison for input.

Task 5. Internal stakeholder engagement. In this task, Keen Independent will broaden our discussion of priorities to include all staff and internal stakeholders to the City.

Task 5-a. Internal virtual workshop. Keen Independent has developed a methodology we call a “virtual workshop” to gather a large amount of qualitative feedback at once. A virtual workshop is delivered like an online survey but functions more like an asynchronous focus group where individuals may provide their feedback in as much depth as they like at a time that is convenient for them. We ask several open-ended questions designed to generate thoughtful responses on a variety of related topics.

The study team will design a City-wide virtual workshop that will inquire about the following topics:

- Demographic information;
- Personnel practices and policies;
- Workplace climate;
- Staff training (DEI-related and other);
- Service delivery;
- Existing community engagement efforts; and
- Highest priorities for racial equity (raised by leadership as part of Task 4).

We will analyze data from the virtual workshop and present the results as part of a report appendix.

Task 5-b. Interviews and listening sessions. Keen Independent will conduct interviews and listening sessions with up to 20 key staff members to gather additional insights on the highest racial equity priorities and achievable and sustainable initiatives. Discussions will provide a safe space for candid discourse.

We have had prior success with segmenting these listening sessions by employee characteristics to ensure that all participants feel comfortable sharing their opinions. For example, for the Oregon Mental Health Regulatory Agency DEI assessment, we provided listening sessions specifically for clinicians of color and for clinicians identifying as LGBTQIA+ to help facilitate a welcoming environment. Furthermore, Keen Independent project staff of color and staff identifying as LGBTQIA+ facilitated these groups.

The results of these interviews and focus groups will be presented in aggregate alongside the virtual workshop results. Although we will pull out key quotes to enrich the REAP, we will be careful not to identify any individuals in the written content.

Task 5-c. Baseline report. Synthesizing information from all previous tasks, Keen Independent will develop a baseline report assessing the strengths, challenges and opportunities of Culver City in terms of its progress toward racial equity. We will present this report in draft format to the City and provide ample time for review and revisions. We suggest allotting two weeks to review and provide commentary on the plan but can work with the City to determine another reasonable time frame.

Deliverables. Deliverables for Task 5 include:

- Memo containing internal virtual workshop questions;
- Memo containing interview/listening session protocol;
- Report appendix summarizing internal engagement; and
- Draft and final baseline report.

Task 6. Community engagement. We agree with the City that a robust community engagement strategy is crucial to the success of the REAP. In addition to avenues for direct, asynchronous contact with the study team, Keen Independent will gather input from Culver City residents, community leaders, business owners, workers and other stakeholders through the means described below.

Task 6-a. External virtual workshop. The study team will design an external virtual workshop to gather community input similar to the internal virtual workshop. We will draft questions for the virtual workshop and ask the City for input. We will develop a robust plan to disseminate the virtual workshop link/QR code to encourage participation by a wide, diverse audience. We understand that Culver City is a diverse place in which residents may feel more comfortable sharing their opinions in languages other than English. We are able to provide the virtual workshop in English and Spanish and will work with the City's resources to translate the instrument into additional languages as needed.

Task 6-b. Advisory group. The Keen Independent study team will work with the City to identify current partners (and augment that list) to build a representative committee of external study advisors who will provide guidance on racial equity and inclusion priorities. We will send email invitations and reminders to current and potential partners. Participants will be asked to attend a maximum of two virtual Advisory Group meetings to provide input from their perspectives as stakeholders from diverse backgrounds. We will look to the Committee to also serve as a conduit to their communities, personal contacts and professional networks for sharing information and soliciting participation in research tasks in the study (including the virtual workshop in Task 6-a).

Keen Independent has successfully recruited and engaged advisory groups for several of our equity projects. For example, we facilitated the creation of an advisory committee for Santa Clara County Parks and Recreation that the Department has looked to for feedback at various stages of the study. We also assembled an Ad-hoc Advisory Group for the Dane County assessment that led to enhanced post-study ongoing relationships with the County.

Task 6-c. Town hall meeting. In the interest of increased transparency, Keen Independent recommends the facilitation of a town hall meeting around the study midpoint. With the public announcement at the beginning of the study and a presentation at the close of the study, this will provide the community with multiple points of awareness and give opportunities for feedback at several stages. At the town hall, the study team will present an overview of the study and some preliminary findings (to be approved in advance by the City). We will then provide attendees with comment cards to fill out and return to us. All public comments will be synthesized into an appendix that summarizes external stakeholder engagement.

Deliverables. Deliverables for Task 6 include:

- Memo containing external virtual workshop questions;
- Agenda for advisory group meeting;
- Presentation slides for town hall meeting; and
- Report appendix summarizing external engagement.

Task 7. Racial Equity Action Plan (REAP) development. All research conducted will be synthesized in this task to develop the Racial Equity Action Plan (REAP). Keen Independent will use a Results Based Accountability (RBA) framework to develop the REAP by identifying goals for the City and working backwards to determine how the City will achieve those goals.

Task 7-a. Initial plan development. The Keen Independent study team will develop a draft REAP for the City to review. The plan will include:

- Outlining of the City's strengths;
- Opportunities for improvement of policies, programs and procedures;
- Benchmarks for equitable hiring;
- Recommendations for ongoing community engagement; and
- Other relevant topics that emerged from the research.

We will provide short-, medium- and long-term goals that are specific and measurable based on our recommendations. The City will receive a draft of the REAP, along with supporting appendices that document our entire research effort, with ample time for feedback.

Task 7-b. Finalization of plan. Following receipt of the City's feedback on the draft plan, Keen Independent will finalize the plan and associated appendices. The final REAP will contain a cost estimate to implement the plan and a recommended budget allocation to support implementation.

Task 7-c. Presentation of plan. Keen Independent will present the final REAP to City leadership, City Council and the public in an appropriate forum (e.g., City Council meeting, if desired). We will develop PowerPoint slides to facilitate the presentation and make slides available to presentation attendees.

Deliverables. Deliverables for Task 7 include:

- Draft REAP and supporting appendices;
- Final REAP (including cost estimate) and supporting appendices; and
- Presentation slides.

Task 8. Implementation support. Our greatest indicator of success as consultants is our clients' ability to implement our plans and recommendations long after our assignments have ended. We will ensure that the City has the needed resources to successfully implement the REAP and embed racial equity into all facets of the City's operations.

Task 8-a. Development of supporting resources. To support different learning styles, Keen Independent will develop a variety of materials that will familiarize staff with the REAP. These may include:

- Checklists;
- Infographics;
- PowerPoint slides; and/or
- Talking points.

We will provide the City with digital copies of all materials and will use the materials we develop as part of the training described in the next tasks.

Task 8-b. Implementation session with the Equity and Human Relations Advisory Committee. To support them in their role as advisors to the City Council, Keen Independent will conduct a virtual implementation session with the Equity and Human Relations Advisory Committee. During this session, we will review the REAP, provide guidance on how the Committee can support its implementation and answer any questions Committee members may have. We will record this meeting and provide the recording, along with presentation materials, to Committee members for future reference.

Task 8-c. Capacity-building and training. The study team will conduct up to two additional training sessions with staff. These can occur in person, but we can also offer virtual training for greater flexibility and accessibility, if desired. During these training sessions, Keen Independent will:

- Provide an overview of the REAP, including specific strategies for implementing recommendations and measuring progress;
- Discuss best practices for overcoming organizational barriers the City may encounter in implementing the REAP; and
- Facilitate a broader discussion on using an equity lens in the City's work with diverse populations.

Deliverables. Deliverables for Task 8 include:

- Digital copies of supporting resources;
- Equity and Human Relations session PowerPoint slides; and
- Staff training PowerPoint slides.

D. Fees

As requested in the RFP, Keen Independent provides our fees for each task in Phase I of the Project Scope. We will provide fees for Phase II upon successful bidding.

Phase I fees. To complete Phase I of this project, Keen Independent proposes a budget not to exceed \$92,820 (breakdown by task and staff appear below in Figure V-2). This budget includes travel by local and out-of-town staff. We bill for our projects each month based on the percentage of each task we completed for that month. Our work is supported by a narrative progress report.

V-2. Proposed budget

Tasks and Subtasks	David Keen, Principal	Annette Humm Keen, Principal	Keen Independent Senior Consultants	Keen Independent Consultants	Keen Independent RAs and Project Assistants	Total Hours by Task	Total Cost by Task
Hourly rates	\$ 375	\$ 275	\$ 185	\$ 160	\$ 120		
1. Project initiation and management							
<i>Professional Time</i>	16	12	10	36	4	78	\$ 17,390
<i>Expenses (travel, local mileage)</i>	\$ 800			\$ 200			\$ 1,000
TOTAL	\$ 6,800	\$ 3,300	\$ 1,850	\$ 5,960	\$ 480		\$ 18,390
2. Review of policies, programs and procedures							
<i>Professional Time</i>	16	12	16	36	44	124	\$ 23,300
<i>Expenses (travel, local mileage)</i>							\$ -
TOTAL	\$ 6,000	\$ 3,300	\$ 2,960	\$ 5,760	\$ 5,280		\$ 23,300
3. Workforce analysis							
<i>Professional Time</i>	12	4	28	24	12	80	\$ 16,060
<i>Expenses (travel, local mileage)</i>							\$ -
TOTAL	\$ 4,500	\$ 1,100	\$ 5,180	\$ 3,840	\$ 1,440		\$ 16,060
4. Preliminary identification of highest priorities							
<i>Professional Time</i>	8	8	4	20	4	44	\$ 9,620
<i>Expenses (travel, local mileage)</i>				\$ 100			\$ 100
TOTAL	\$ 3,000	\$ 2,200	\$ 740	\$ 3,300	\$ 480		\$ 9,720
5. Internal stakeholder engagement							
<i>Professional Time</i>	12	24	8	48	32	124	\$ 24,100
<i>Expenses (travel, local mileage)</i>		\$ 1,050		\$ 200			\$ 1,250
TOTAL	\$ 4,500	\$ 7,650	\$ 1,480	\$ 7,880	\$ 3,840		\$ 25,350
<i>Total hours by staff</i>	64	60	66	164	96	450	
<i>Total professional fees by staff</i>	\$ 24,000	\$ 16,500	\$ 12,210	\$ 26,240	\$ 11,520		\$ 90,470
<i>Total expenses</i>	\$ 800	\$ 1,050	\$ -	\$ 500	\$ -		\$ 2,350
<i>Total for project</i>	\$ 24,800	\$ 17,550	\$ 12,210	\$ 26,740	\$ 11,520		\$ 92,820
Not to exceed total:							\$ 92,820

E. References

Keen Independent provides the following references in the table below.
Project examples are provided on the following pages.

References

Orange County Transportation Authority Diversity, Equity and Inclusion Strategy

Joel Zlotnik, Communications Manager
Orange County Transportation Authority
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Orange, CA 92868
714-560-5713 (office); 949-547-9672 (mobile)
jzlotnik@octa.net

work2future Silicon Valley Dichotomy Study II

Lawrence Thoo
work2future
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City of Milwaukie, Oregon Equity and Inclusion Assessment and DEI Plan

Ann Ober, City Manager
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10722 SE Main Street
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503-786-7501
obera@milwaukieoregon.gov

Assessment of Dane County Government Workplace Climate and Parks and Zoo Access and Equity Program Evaluation

Lisa Mackinnon, Sustainability and Program Evaluation Coordinator
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Project Examples

On the following pages, Keen Independent provides descriptions for some of our recent relevant work.

- Orange County Transportation Authority Diversity, Equity and Inclusion Strategy;
- work2future Silicon Valley Dichotomy Study II;
- Santa Clara County Parks and Recreation Diversity, Equity and Inclusion Organizational Assessment and Action Plan;
- City of Milwaukie, Oregon Equity and Inclusion Assessment and DEI Plan;
- Assessment of Dane County Government Workplace Climate;
- Dane County Parks and Zoo Access and Equity Program Evaluation; and
- Salt Lake City Equity, Inclusion and Belonging Plan.

Orange County Transportation Authority Diversity, Equity and Inclusion Strategy



The Orange County Transportation Authority (OCTA) sought to enhance its efforts to become an even more equitable, inclusive and diverse organization. OCTA engaged Keen Independent Research to develop a strategy inclusive of employees, contractors, transit users, and all members of the public who utilize and benefit from OCTA's projects, programs and services. The plan built upon OCTA's past equity efforts, enhancing community engagement and strengthening future decision making.

Description of services provided. Keen Independent assessed OCTA employment and contracting practices as well as service delivery and community input from an equity perspective.

This project encompassed equity in four areas:

- An assessment of OCTA's policies, practices and procedures;
- Background research on best practices related to equity in the transportation industry;
- Development of recommendations, strategies and short-, medium- and long-term goals in the form of an Action Plan; and
- Creation of an equity framework and working definitions for related terms.

As part of this process, Keen Independent sought input from OCTA employees and stakeholders through many different avenues such as:

- In-depth interviews and focus groups with a broad range of OCTA staff and leadership;
- Employee survey; and
- Public input via study website, dedicated email and telephone hotline.

Additional research included:

- Case studies of other transit agencies, programs and models; and
- Program analysis of OCTA policies and practices.

Outcome. Deliverables included a thorough assessment informed by internal and external stakeholders, detailed recommendations, an implementation plan and an equity framework.

Project schedule. This project was completed in fall 2022.

Key personnel. David Keen and Annette Humm Keen, Principals, led this assignment. Janine Kyritsis, Chief Operating Officer, helped to direct this study. Blanca Monter, Senior Consultant, led quantitative research and analysis. Haley Adams, Consultant, performed qualitative research.

work2future Silicon Valley Dichotomy Study II

Keen Independent performed a study for work2future that examined issues facing limited-income Latino, Vietnamese American, Filipino American and African American households.



Description of services provided. The San Francisco Bay Area, including Silicon Valley, is one of the highest income regions of the United States. However, a large portion of its residents are in economic distress or at risk of being in economic distress. Although high-wage jobs for highly-skilled workers continue to grow, middle-skill and middle-wage jobs are shrinking. In Silicon Valley, Latinos, Vietnamese Americans, Filipino Americans and African Americans are at particular risk of facing economic distress.

Keen Independent performed an innovative study of young adults in those communities, their skills and employment prospects, and pathways to education, skills training and living wage jobs. Keen Independent pointed out prevalent myths regarding these groups and recommended ways to help young adults get on a pathway to economic self-sufficiency.

Techniques and approaches. The study methodology included the following techniques:

- Quantitative workforce disparity analysis;
- Literature review and review of best practices; and
- Online, phone and in-person interviews.

Recommendations and implementation. Based in part on the Keen Independent study, the City of San Jose and agencies such as work2future have shifted their focus from “finding jobs” to “helping residents start on a pathway to good jobs.” The City now focuses on fewer people, but providing more help. Keen Independent also helped agencies redesign their assistance delivery based on the barriers and constraints for individuals in the target groups.

Project size and dates. This project began in February 2017 and was completed in December 2017 (on-time and on-budget).

Key personnel. David Keen managed this project and Blanca Monter developed a statistical profile, including education, race/ethnicity, gender, immigration, poverty, housing and employment, of Santa Clara County, California using ACS data and the Current Population Survey.

Link to final report. View the final report https://keenindependent.com/wp-content/uploads/2022/11/KeenIndependent_SanJose_DichotomyStudyII_FinalReport06082018.pdf

Santa Clara County Parks and Recreation Diversity, Equity and Inclusion Organizational Assessment and Action Plan



SANTA CLARA COUNTY PARKS

Santa Clara County (SCC) Parks and Recreation Department is seeking to increase equitable access to its parks by evaluating policies, procedures, training and community engagement practices. SCC engaged Keen Independent to develop a DEI plan and road map inclusive of all stakeholders.

Description of services provided. Keen Independent is assessing SCC service delivery, staff training, personnel practices and policies and community climate among other factors through an equity lens.

The project is encompassing the following areas:

- Assessment of personnel practices and policies;
- Background research on best practices related to service delivery by comparable public agencies;
- Assessment of community outreach efforts; and
- Development of a DEI plan and road map for the Department.

As part of this process, Keen Independent is seeking input from OCTA stakeholders through a number of means including:

- In-depth interviews with stakeholders;
- An external virtual workshop with visitors and community members;
- An internal virtual workshop with employees; and
- Public input via study website, dedicated email and telephone hotline.

Project schedule. This project will be completed in spring 2024.

Key personnel. Annette Humm Keen, Principal, is leading this assignment. Dr. Nicole Yates, Consultant, is leading quantitative and qualitative research and analysis.

City of Milwaukie, Oregon Equity and Inclusion Assessment and DEI Plan



The City of Milwaukie has made equity, inclusion and justice a priority in how it serves the public and operates as an employer. The City engaged Keen Independent Research to develop an equity plan to advance these efforts. Our work with the City of Milwaukie concluded with a final presentation of the equity plan to the City Council in October 2023.

Description of services. Keen Independent Research assessed city employment and contracting practices, facilitating internal and external discussions related to workplace climate, and evaluating service delivery from an equity perspective.

The study included four major areas of activity:

- Developing a comprehensive, long-term plan for ensuring diversity, equity, inclusion and belonging in the City's workforce;
- Creating a more equitable system for how the City spend funds on contractors, vendors, not-for-profit organizations and other groups;
- Redirecting *what* services the City performs to better reflect equity; and
- Improving *how* the City provides those services, to ensure equity in service delivery.

As part of this effort, Keen Independent obtained input from city employees, local residents and other stakeholders through:

- Interviews;
- Focus groups;
- Surveys;
- Virtual workshops;
- Virtual town hall meetings; and
- Other avenues.

Dates of service. The study began in July 2022 and was completed in October 2023.

Key personnel. David Keen and Annette Humm Keen directed this assignment. Dr. Nicole Yates led key research elements and served as the project expeditor. Blanca Monter, Senior Consultant, performed quantitative research and analysis of employee hiring for the project.

Additional information. A link to the study website can be found here:

<https://keenindependent.com/MilwaukieDEI2022/>

Assessment of Dane County Government Workplace Climate

Dane County engaged Keen Independent in June 2023 to assess workplace climate across all departments and divisions.

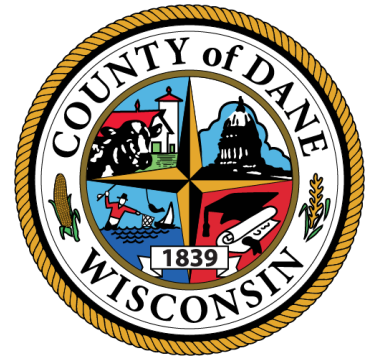
Engagement efforts. The Keen Independent study team is using a number of efforts to collect data and information regarding DEI in the workplace. Efforts include:

- Review of policies, procedures and programs;
- Meetings with staff and key stakeholders;
- Focus groups, interviews and virtual workshops;
- Evaluation of DEI best practices; and
- Background research.

Recommendations and implementation. Keen Independent will make recommendations and a plan for implementation to support final recommendations based on study research.

Dates of service. This study began in June 2023 and will conclude in January 2024.

Key personnel. Annette Humm Keen, Principal, is leading this assignment. Dr. Nicole Yates performs qualitative and quantitative research and serves as the Project Expeditor.



Dane County Parks and Zoo Access and Equity Program Evaluation



Dane County Parks and Zoo sought to further integrate diversity, equity and inclusion into its parks through an Equity Program Evaluation.

Description of services provided. Keen Independent performed an evidence-based internal and external DEI evaluation of Dane County Parks and Zoo policies and practices using the following methodology:

- Identify County strengths and weaknesses regarding social, racial and access equity;
- Virtual internal stakeholder interviews;
- On-site surveys with park and zoo users;
- Focus groups with parks and zoo non-users; and
- Background research.

Outreach and engagement. This plan was informed by stakeholder engagement, organizational assessments and other research. It included Dane County Parks and Zoo guest surveys, the stakeholder meetings and final recommendations. Keen Independent conducted extensive outreach to the Hmong community in Wisconsin as well as the LGBTQIA+ community and those with disabilities. Outreach was conducted via study website, virtual workshop and community surveys with the desire to strengthen inclusion from these communities.

Additionally, as part of embedding diversity, equity and inclusion in Dane County Parks and Zoo processes, Keen Independent assisted in the developing recommendations and identifying necessary implementation tools.

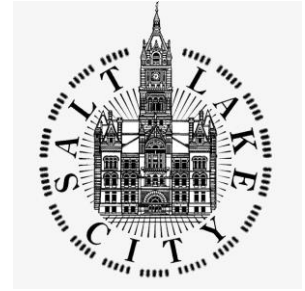
Project schedule. This project began in December 2021 and was completed in August 2022.

Key personnel. Annette Humm Keen, Principal, led this assignment. Janine Kyritsis, Chief Listening Officer, led qualitative analysis. David Keen, Principal and Blanca Monter, Senior Consultant, performed quantitative research.

Link to final report. A copy of Keen Independent's final report can be found here:
https://keenindependent.com/KeenIndependent_DaneCountyParksZooEvaluation.pdf

Salt Lake City Equity, Inclusion and Belonging Plan

Salt Lake City (the City) sought to integrate equity across City functions and decision-making. In spring 2021, the City engaged Keen Independent Research to develop an equity-related, plan to guide the City as it begins to deepen its efforts to support a more just community.



Description of services provided. The equity plan development involved input from City staff, diverse community members, cultural groups and others. Each City department provided input. Participants had a diversity of expertise, native language, physical ability, native country, education, lived experience, racial and ethnic identity and more. These individuals provided insight on Salt Lake City’s progress, lasting challenges and recommendations. Supported by data analysis and policy review, the resulting Plan is well-informed and specific to the needs of Salt Lake City.

Techniques and approaches. The Keen Independent study team analyzed quantitative and qualitative information including workforce data. Additional data collection from employees, community members and the City included:

- Virtual surveys;
- Quantitative workforce disparity analysis;
- Assessment of online employee reviews; and
- Outreach to diverse community members.

Keen Independent collaborated with the City’s human resources department and the Implementation Team to develop strategies for the implementation of the equity plan.

Workplace climate considerations. The assessment considered perspectives on workplace climate in research with internal stakeholders as well as a review of policies and practices related to climate. Findings created a foundation for the City’s next steps, recognizing most employees viewed their workplace climate positively, but that ratings showed differences for specific demographic groups.

Results and recommendations. Informed by evidence, Keen Independent helped the City develop and embed a concern for equity and inclusion in core activities across city departments, from how it measures success internally to methods to receive and communicate information to the public. The project involved the Mayor, department heads and staff, commissions and advisory groups, and community stakeholders.

The resulting plan equipped the City to take immediate action on new systems to incorporate equity and inclusion into resource allocation, hiring and promotion, community engagement and other decision-making.

Key personnel. David Keen and Annette Humm Keen managed this project. Blanca Monter led employment and availability data collection. Janine Kyritsis managed interviews and surveys. Manuel Perez performed quantitative analysis.

Dates of service. This project began in January 2021 and was completed in Spring 2022.

Additional information. A link to the study website can be found here:

<https://keenindependent.com/saltlakecityequity2021/>

F. Implementation Schedule

In this section, Keen Independent presents our proposed schedule to complete Phase I of this project.

Project timeline. Assuming a start date in early January 2024, Keen Independent proposes a 7-month time frame to develop the baseline report that will result from Phase I of the study. Our approach is very flexible, so we are happy to adjust our scope and schedule to better fit the needs of the City.

D-3. Proposed schedule for Phase I

Study tasks	2024											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
1. Project initiation and management	[Active]											
2. Review of policies, programs and procedures	[Active]											
3. Workforce analysis	[Active]											
4. Preliminary identification of highest priorities				[Active]								
5. Internal stakeholder engagement					[Active]							

Milestones and deliverables. Keen Independent anticipates the following key times for milestones and deliverables associated with the project:

- January 2024:
 - Project kick-off meeting;
 - Study fact sheet;
 - Study website, email address and hotline;
 - Workforce policy document request;
 - DEI-relevant policy document request;
 - Procurement policy document request; and
 - Workforce data request.

- March 2024:
 - Policy, program and procedure analysis appendix;
 - DEI policy analysis appendix; and
 - Workforce analysis appendix.

- April 2024:
 - Listening session with leadership; and
 - Memo summarizing highest priorities identified by leadership.

- May 2024:
 - Internal virtual workshop; and
 - Staff interviews/listening sessions.

- June 2024:
 - Appendix summarizing internal engagement; and
 - Development of baseline assessment.

- July 2024:
 - Draft and final baseline assessment.

Phase II timeline estimate. For the City’s reference, we propose an additional 5 months to complete Phase II, making the entire study timeframe 12 months.

G. Certificate(s) of Insurance

Keen Independent is prepared to submit our Certificate of Insurance to the City if chosen as the successful respondent to this proposal.

H. Business Tax Certificate

Keen Independent is prepared to obtain a Culver City Business tax certificate if chosen as the successful respondent to this proposal.

I. Standard City Professional Services Agreement

Keen Independent reports no concerns with the City's standard agreement and is prepared to sign the agreement as is if chosen as the successful respondent to this proposal.

E. Attachments — Cost proposal

In this section, Keen Independent presents our fees for this assignment.

Phase I Fees

To complete each task associated with Phase I of this project, Keen Independent proposes a budget not to exceed \$92,820 (breakdown by task and staff appear below in Figure E-1). This budget includes travel by local and out-of-town staff. We bill for our projects each month based on the percentage of each task we completed for that month. Our work is supported by a narrative progress report. We will provide fees for Phase II upon successful bidding.

E-1. Proposed budget

Tasks and Subtasks	David Keen, Principal	Annette Humm Keen, Principal	Keen Independent Senior Consultants	Keen Independent Consultants	Keen Independent RAs and Project Assistants	Total Hours by Task	Total Cost by Task
Hourly rates	\$ 375	\$ 275	\$ 185	\$ 160	\$ 120		
1. Project initiation and management							
<i>Professional Time</i>	16	12	10	36	4	78	\$ 17,390
<i>Expenses (travel, local mileage)</i>	\$ 800			\$ 200			\$ 1,000
TOTAL	\$ 6,800	\$ 3,300	\$ 1,850	\$ 5,960	\$ 480		\$ 18,390
2. Review of policies, programs and procedures							
<i>Professional Time</i>	16	12	16	36	44	124	\$ 23,300
<i>Expenses (travel, local mileage)</i>							\$ -
TOTAL	\$ 6,000	\$ 3,300	\$ 2,960	\$ 5,760	\$ 5,280		\$ 23,300
3. Workforce analysis							
<i>Professional Time</i>	12	4	28	24	12	80	\$ 16,060
<i>Expenses (travel, local mileage)</i>							\$ -
TOTAL	\$ 4,500	\$ 1,100	\$ 5,180	\$ 3,840	\$ 1,440		\$ 16,060
4. Preliminary identification of highest priorities							
<i>Professional Time</i>	8	8	4	20	4	44	\$ 9,620
<i>Expenses (travel, local mileage)</i>				\$ 100			\$ 100
TOTAL	\$ 3,000	\$ 2,200	\$ 740	\$ 3,300	\$ 480		\$ 9,720
5. Internal stakeholder engagement							
<i>Professional Time</i>	12	24	8	48	32	124	\$ 24,100
<i>Expenses (travel, local mileage)</i>		\$ 1,050		\$ 200			\$ 1,250
TOTAL	\$ 4,500	\$ 7,650	\$ 1,480	\$ 7,880	\$ 3,840		\$ 25,350
<i>Total hours by staff</i>	64	60	66	164	96	450	
<i>Total professional fees by staff</i>	\$ 24,000	\$ 16,500	\$ 12,210	\$ 26,240	\$ 11,520		\$ 90,470
<i>Total expenses</i>	\$ 800	\$ 1,050	\$ -	\$ 500	\$ -		\$ 2,350
<i>Total for project</i>	\$ 24,800	\$ 17,550	\$ 12,210	\$ 26,740	\$ 11,520		\$ 92,820
Not to exceed total:							\$ 92,820