

PROPOSAL

JANUARY 4, 2021

RFP #EODX-210013-DM



SUBMITTED BY:

DR. FRED SEAMON

EXECUTIVE VICE PRESIDENT

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200890_Request for Proposal_20210304

DISPARITY STUDY

CITY OF GAINESVILLE



January 4, 2021

Mr. Darius McPhall
Procurement Division
200 East University Avenue, Room 339
Gainesville, Florida 32601

Dear Mr. McPhall:

MGT of America Consulting, LLC (MGT) appreciates the opportunity to submit this proposal to complete the City of Gainesville's (City) Disparity Study in response to RFP #EODX-210013-DM.

Clients that have conducted a disparity study are in the unique position to increase and improve system equity through procurement and contracting, which can ultimately promote economic empowerment by creating strong business and employment pipelines in communities of color. The disparity studies conducted by MGT have provided a path forward for agency staff by transforming operations, systems, policies, and practices, which have ultimately benefited the minority business community.

In addition to disparity studies, MGT has extensive experience transforming local government operations, systems, policies, and practices that gives MGT a distinct advantage over other firms. For example, MGT has provided Executive Recruiting for the City of Gainesville and has been on the City's Contract for Master Consulting Services for Organizational Design, HR Policy, Project Management, and Leadership since 2018.

MGT is the largest provider of disparity studies and has conducted more disparity studies than any other firm in the United States. This achievement is a very significant indicator of the quality of our work and legal defensibility of 220+ disparity and disparity-related (program implementation, litigation, etc.) studies. MGT has conducted disparity studies in 11 of 12 judicial districts, and to date, every program developed or continued as a result of an MGT disparity study remains in place. This experience is unmatched and will result in an accurate, reliable, valid, and legally defensible study for the City.

MGT has completed disparity and related studies (program review/implementation, litigation support, etc.) for the following **Florida clients**:

- ▶ Blueprint Intergovernmental Agency, 2019
- ▶ Broward County, 2000
- ▶ City of Fort Lauderdale, 2019
- ▶ City of Hollywood, 1997
- ▶ City of Miramar, 2018
- ▶ City of Pensacola, 2013, 2012, 2009
- ▶ City of Tallahassee, 2019, 2005, 2004, 2001, 1990
- ▶ Leon County, 2019, 2009, 2004, 2002, 2000, 1994
- ▶ Leon County School District, 1994
- ▶ Miami-Dade College, 1995
- ▶ Miami-Dade County, 2003
- ▶ Orange County, 2005
- ▶ Orlando-Orange County Expressway Authority, 2006
- ▶ Osceola County, 2018

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- ▶ City of West Palm Beach, 1990
- ▶ Cummings, Hobbs, and Wallace, 1999
- ▶ Florida Department of Transportation, 1998, 1996, 1992
- ▶ Hillsborough County Aviation Authority, 2014
- ▶ Jacksonville Transportation Authority, 2005, 2003, 2002
- ▶ Palm Beach County, 1990
- ▶ Palm Beach County Schools, 1995
- ▶ School Board of Miami-Dade County, 2014
- ▶ South Florida Water Management District, 1995

With three decades of conducting disparity and disparity-related studies, few firms can match MGT's experience and track record conducting large comprehensive, rigorous, and legally supportable disparity and disparity related studies. We have assembled the most experienced disparity study team in the nation who **represent 50+ years of disparity study experience**. As a result, our team possesses in-depth knowledge and expertise conducting large-scale disparity studies and has successfully completed several of the largest, most complex studies ever conducted, including the State of Texas and City of New York.

MGT is proposing to conduct a comprehensive and legally supportable disparity study for the City consistent with prevailing industry and legal standards. MGT has developed its methodology, approach, and work plan to ensure all of the City's requirements and expectations are met in a rigorous, timely, effective, and efficient manner. Our methodology and approach to the City's study is based on a thorough analysis of the RFP requirements, responses to bidder's questions, our past experience conducting previous studies, and our current understanding of the availability, accessibility, and limitations of the data that will be subject to analyses of procurement and contracting for the designated study period.

We look forward to further discussing our qualifications and approach with the City on conducting this important disparity study. Should you have questions on any aspect of our proposal, please contact me at **FSeamon@mgtconsulting.com** or **850.212.6458**.

Regards,

A handwritten signature in blue ink that reads "Fred Seamon".

Fred Seamon, Ph.D.
Executive Vice President
Authorized to Bind the Firm

CITY OF GAINESVILLE

RFP #EODX-210013-DM | DISPARITY STUDY
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B) TECHNICAL PROPOSAL

..... ABOUT
MGT CONSULTING GROUP

MGT, a Florida-based LLC, was established in 1974 and has been in continuous business since then. MGT delivers a diverse range of services to a variety of public sector organizations and nonprofit groups.



With over 220 full-time professionals, some of whom are nationally recognized expert researchers, we have the internal capacity and ability to augment our team with other equally qualified staff, if needed on this project.

MGT's disparity team has over 50 years of combined experience.



MGT's client base includes:

- Cities, counties, and other local government entities.
- State and federal agencies.
- School boards, school districts, state education departments, universities, colleges (both four- and two-year), governors' offices, blue ribbon committees, legislatures, and Boards of Regents.
- Special districts, including airport authorities.
- Health and human services organizations.
- International entities, including government ministries and non-governmental organizations.



MGT has conducted more disparity studies than any other firm in the United States. This achievement is a very significant indicator of the quality of our work and legal defensibility of 220+ studies. It is even more significant that many of the programs established using the results of our studies and our recommendations have remained strong and vigorous, resulting in an increase in M/W/DBE participation.

MGT has conducted disparity studies in 11 of 12 judicial districts

To date, every program developed or continued as a result of an MGT disparity study remains in place.



Major services provided by MGT include:

- ***Disparity studies***
- ***Program review & implementation***
- ***Goal setting and goal setting methodology***
- Comp/class studies
- Costing services
- Human resource studies
- K-12 education consulting
- Management/organizational efficiency studies
- Performance reviews and audits
- Program evaluation
- Strategic planning
- Workforce development studies

WHY CHOOSE MGT?

Our team of experts evaluate and examine contracting, procurement, and workforce inequalities to bring our clients answers and remedies that are legally defensible and objective. MGT has assisted clients navigate the complexities and challenges involved in producing accurate and valid disparity assessments so everyone has a greater path to economic opportunity and prosperity.



CUSTOM CENSUS

MGT is the only firm using the true custom census in its entirety as detailed in the national model disparity study guidelines. The custom census is the best method to estimate availability of firms. Bottom line: we have a more robust data-collection process.



HEIGHTENED CITIZEN & CLIENT EXPECTATION

We focus on improving the citizen/business owner experience by objectively evaluating the current procurement processes and procedures, as well as dedicating a client success manager.



UNBIASED RESEARCH

Our nationally-recognized experts help clients clearly present evidence to consider in implementing a program. MGT's disparity study will serve as the basis of a legal defense should the program be challenged.



MGT'S STUDY GUARANTEE

We guarantee an accurate, reliable, valid, and legally defensible disparity study.

PROJECT UNDERSTANDING

Based on our current understanding, the City's Disparity Study requested by this RFP will be used to aid the City in evaluating and improving its current programs as part of its first comprehensive disparity study. The results and recommendations will serve as a reference document in the creation of directives, standards, and practices. The City's ultimate goal is to ensure MBE/WBEs, have the opportunities to participate in City contracts. Within this context, the City is interested in the consultant examining, researching, and analyzing multiple factors in determining the effects and outcomes of any marketplace barriers that adversely impact the utilization and availability of MBE/WBE firms in participating in City contracting opportunities.

To meet the City's needs, the study must be comprehensive and must comply with all requirements and specifications clearly outlined in the Scope of Services in the City's RFP, which are very precise and prescriptive relative to the City's expectations for its Disparity Study. To be successful, the consultant must have experience conducting disparity studies that conform to relevant disparity case law best practice methodologies that inform the market area analysis, product market analysis, utilization analysis, availability analysis, disparity analysis, and other vital components of a legally defensible disparity study. The consultant also must have the "right team" who understands the environment and

context in which the study will be conducted and can appropriately navigate and mitigate any limitations and/or risks associated with the collection and analysis of data for the study period.

Successfully completing a legally defensible study has inherent risks and challenges that must be expertly addressed and resolved. Because of MGT's disparity study history and expertise and our overall research prowess, MGT is ideally suited to meet the City's need for a study that has the potential to reshape procurement and contracting operations and achieve the City's goal of *full and equitable participation in all City procurement activities*.

METHODOLOGY

When addressing equity and inclusion in public contracting, governments are obligated to identify and examine evidence from their markets that may indicate discrimination is impacting the ability of firms to compete successfully in contracting opportunities. The most impactful influences regarding how governments should evaluate the need for, and implementation of, a Minority- and Women-Owned Business Enterprise (MWBE) or Disadvantaged Business Enterprise (DBE) program has been two cases: *Croson* and *Adarand*.

The *Croson* decision required local government agencies' race preference contracting programs be able to withstand strict scrutiny review to avoid violating the Equal Protection Clause of the Fourteenth Amendment. Strict scrutiny must be met by:

- ◆ demonstrating a "compelling interest" in the remedial purpose of the MWBE program; and,
- ◆ ensuring that the program is "narrowly tailored" to meet the remedial goal.¹

The *Adarand* decision applied the *Croson* requirement of strict scrutiny to the federal DBE program.

While these cases are clear that evidence must be presented in order to create an affirmative action program, they do not regulate how a government may identify and present this evidence. One option for governments is to conduct what has become known as a disparity study.

A good disparity study will:

- ◆ Serve as the basis of a legal defense should the program be challenged.
- ◆ Meet all regulatory requirements related to such programs.
- ◆ Clearly present evidence to consider in implementing a program.
- ◆ Provide recommendations regarding program administration.
- ◆ Provide education regarding the value and purpose of the study, and the findings and recommendations for procurement and program management.

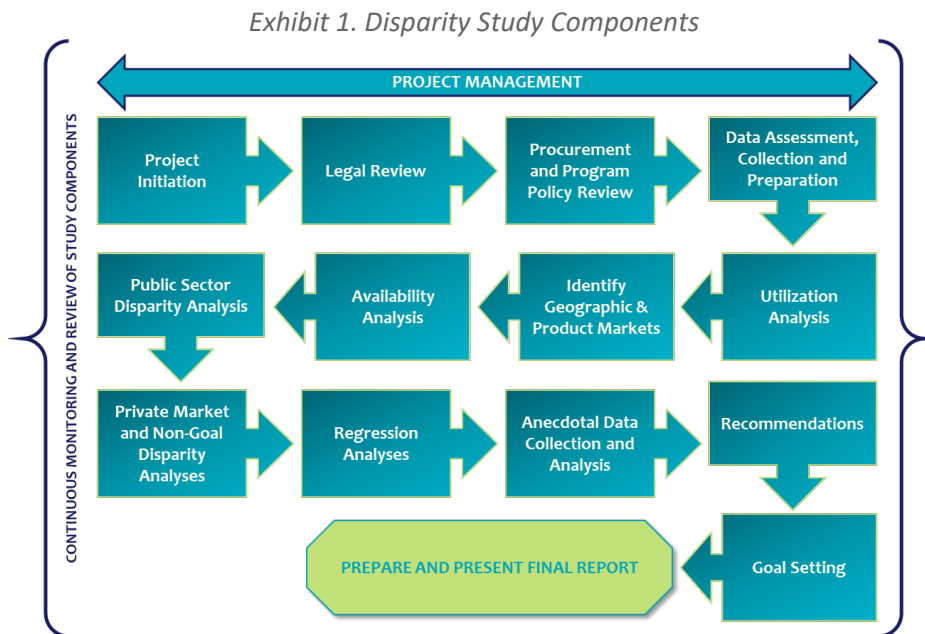
¹ *Croson*, at 727-28.



MGT has developed a methodology that clearly answers the questions that guide such inquiry:

1. What legal guidance and standards must be followed when designing the conduct of a disparity study?
2. What are the current policies and practices for procurement and the MBE/WBE program? What elements are in place, being utilized, effective in the current policies?
3. What does the City’s contracting records show to be the utilization of firms?
4. What geographic and product markets make up the City’s relevant market area?
5. What is the availability of firms in the City’s relevant markets to perform on contracts?
6. Is there a disparity between the utilization of firms and their availability in the City’s markets? If so, is this disparity significant?
7. Is there disparity in the un-remediated market where there are no goals for contracting?
8. Is any disparity identified in the City’s contracting attributable to factors other than discrimination?
9. What are the experiences of MBE/WBE firms in working or attempting to work on public and private contracting opportunities?
10. What are the opinions and perceptions of firms regarding the City’s procurement and program practices?
11. What actions can the City take in its procurement and program policies to help create a level playing field for all firms?

In response to our guiding research questions, MGT structures its methodology according to these study components, as illustrated in **Exhibit 1**.





In **Exhibit 2** we detail the study team roles pertaining to each study component.

Exhibit 2. Team Roles

WORK TASKS	MGT							SUBS		
	F. Seamon	B. Ledford	L. Browne	A. Bernal	V. Mitchell	L. Opheim	W. Fiorito	K. Miller	Oppenheim	Abelita
Project Management										
Project Initiation										
Legal Review										
Procurement and Program Policy Review										
Data Assessment, Collection, and Preparation										
Utilization Analysis										
Relevant Geographic and Product Market Area										
Availability Analysis										
Public Sector Disparity Analysis										
Private Market Disparity and Non-Goals Analyses										
Anecdotal Data Collection and Analysis										
Recommendations										
Goal Setting										
Develop Draft and Final Reports										

In the following section we explain our methodology for each identified component, present a concise list of each component’s task details, and present the timeline we recommend for this study. MGT is committed to robust and unbiased research; independence and objectivity are inherent in our methodology; therefore, our findings will remain unchanged unless the City or MGT identifies discrepancies or errors in our work.

DISPARITY STUDY COMPONENTS

Exhibit 3 provides a crosswalk between the City’s workscope tasks and study components presented in the proposal.

Exhibit 3. RFP Workscope to MGT Study Components Crosswalk

RFP WORKSCOPE	MGT STUDY COMPONENTS
1. Work plan, project administration and meetings	Task 1: Project Management Task 2: Project Initiation
2. Detailed review of applicable legal standards and requirements	Task 3: Legal Review
3. Review of City procurement policies, procedures, and programs	Task 4: Procurement and Program Policy Review
4. Contract and subcontract data collection	Task 5: Data Assessment, Collection, and Preparation
5. Definition of relevant geographic market area and subindustries for the study	Task 7: Relevant Geographic Market and Product Market Area



RFP WORKSCOPE	MGT STUDY COMPONENTS
6. Availability analysis	Task 8: Availability Analysis
7. Utilization analysis	Task 6: Utilization Analysis
8. Disparity analysis	Task 9: Public Sector Disparity Analysis
9. Quantitative analysis of marketplace conditions	Task 10: Private Market Disparity and Non-Goal Analyses
10. Qualitative analysis of marketplace conditions	Task 11: Anecdotal Data Collection and Analysis
11. Analysis of remedies	Task 12: Recommendations
12. Presentations, reports, and other deliverables	Task 13: Goal Setting Task 14: Develop Draft and Final Reports

TASK 1.0: PROJECT MANAGEMENT

RFP WORKSCOPE: 1. Work plan, project administration and meetings

Purpose: Establish a clear and direct path to study completion and manage all tasks and schedule to successfully complete study.

Based on our experience completing over 220+ disparity studies, a successful disparity study requires detailed and well-organized project initiation, planning, execution, managing project risks, and monitoring. Given our current understanding of the scope and complexity of this study, services requested in this RFP and the fact this is the City’s first study, MGT will utilize a proven project management process to ensure effective and continuous communication, planning, execution, monitoring, and mitigating and managing project risks.

EFFECTIVE AND CONTINUOUS COMMUNICATION

Effective and continuous communication between the MGT Project Manager, the City’s Project Manager, MGT team members, and stakeholders is one of the most critical aspects of project management. MGT’s Project Manager will regularly communicate information about the study’s progress and problems which may arise before becoming a larger issue.

PLANNING AND EXECUTION

As with any effective project management process, the planning starts prior to contract award and is one of the most critical components for project success. Our work plan will be used to guide and direct the planning and execution that will result in a robust disparity study that can guide the City in managing a legally defensible affirmative action contracting program.

MONITORING AND CONTROLLING

MGT’s Project Manager uses Mavenlink, a project management and monitoring software tool, to develop and track key components of the project, such as project schedule, resources, timelines, risks, and milestones. This tool enables us to visually communicate with our clients on the study’s progress.

TASK 2.0: PROJECT INITIATION

RFP WORKSCOPE: 1. Work plan, project administration and meetings

Purpose: Establish clear work plan, project schedule, roles and responsibilities, and outreach plan.

In the first weeks of the project, MGT will work with the City and our subcontractors to initiate the project. We have found this is an important component to a successful study. We will establish a clear work plan, confirm project deliverables, create an outreach plan for the study, and begin to work on identifying and accessing the City's data.

The kickoff meeting provides the best opportunity to ensure clarity of purpose, roles, and expectations for the study project.

MGT will facilitate a virtual kickoff meeting via MS Teams, Skype for Business, Zoom, or another agreed upon virtual platform. The kickoff meeting is a time to introduce MGT, subcontractors, and City team members, orient everyone to the project, and cultivate a collaborative working relationship.

MGT will lead a discussion of the project's goals and present a vision for project success. The study team will review key roles and responsibilities, making sure there is a common understanding of assumptions and expectations and project deliverables and finalize the timeline for the study. The result of these discussions will be a co-created final work plan. This work plan will provide a roadmap which the MGT team and the City will follow.

We will work with our subcontractors and the City to craft an outreach plan for the study. The purpose of the outreach plan is to disseminate information about the study as well as to solicit participation from stakeholders such as City personnel, firms and local business and professional organizations. MGT will create a Frequently Asked Questions (FAQ) document to share information about the study. We also will create a study website to keep the public informed about the progress of the study, opportunities to participate, and provide a format for individuals to share confidential information, experiences, and opinions with the study team to be included with the anecdotal data.

One of the most challenging and time-consuming tasks in a disparity study is identification and collection of the data we need from the City. Before the kickoff meeting, we will submit a data query form to be completed and discussed at the kickoff meeting. This form will ask the City to identify and locate program and policy documents and vendor and contracting data. This will enable us to begin making progress quickly toward obtaining accurate data for the study. To support efficient access to necessary data, MGT will establish a SharePoint site for safe and quick transference and storage of data.

The initiation of the project in this manner establishes a solid foundation for the project.



TASK 3.0: LEGAL REVIEW

RFP WORKSCOPE: 2. Detailed review of applicable legal standards and requirements

Purpose: Determine the legal guidance standards that must be followed when designing a disparity study.

To ensure legal sufficiency of our methodology, MGT has conducted a thorough review of the court decisions in cases subsequent to *Croson*. MGT assisted in the defense of several programs at trial, including *H.B. Rowe vs. North Carolina Department of Transportation*, *Gross Seed vs. Nebraska Department of Roads*, and *Adarand vs. Colorado Department of Transportation*. We will continue to review any new cases that arise during the study period to monitor for any changes pertaining to MWDBE programs.

The *Croson* decision required governments race preference contracting programs be able to withstand strict scrutiny review to avoid violating the Equal Protection Clause of the Fourteenth Amendment. Strict scrutiny review requires that an agency demonstrate a “*compelling interest*” in the remedial purpose of the MWBE program and that the program itself is “*narrowly tailored*” to meet the remedial goal.²

Based on our significant experience with studies and with litigation, MGT is confident that our proposed methodology, crafted with appellate court decisions in mind, will result in a legally defensible program based on our recommendations in the study.

Conducting this legal review and analysis at the beginning of the project establishes the framework for this study. The study must comply with the standards required for a constitutionally sound race- and gender-based program as set forth in *Croson*, *Gross Seed*, *Adarand*, *Concrete Works*, and other relevant opinions. Our legal review also will serve to educate about constitutional strict scrutiny and its application to MBE/WBE programs as well as to detail the legal parameters of our methodology to support potential future defense of a program based on this study.

CASES MGT WILL INCLUDE IN THE LEGAL REVIEW	
Supreme Court's decisions in:	Federal Circuit Court decisions such as:
<ul style="list-style-type: none"> ▪ <i>City of Richmond v. J.A. Croson</i>, 488 U.S. 469 (1989). ▪ <i>Adarand Constructors, Inc. v. Pena</i>, 515 U.S. 200 (1995) (<i>Adarand III</i>). ▪ Other relevant cases from the Supreme Court. 	<ul style="list-style-type: none"> ▪ <i>H.B Rowe v. NCDOT</i>, 615 F.3d 233 (4th Cir. 2010). ▪ <i>Gross Seed Co. v. State of Nebraska</i>, 345 F.3d 968 (8th Cir. 2003). ▪ <i>Sherbrooke Turf, Inc. v. Minn. DOT</i>, 345 F.3d 964 (8th Cir. 2003).
Eleventh Circuit decisions in:	
<ul style="list-style-type: none"> ▪ <i>Cone Corporation v. Hillsborough County</i>, 908 F.2d 909 (11th Cir. 1990), <i>cert. denied</i>, 498 U.S. 983 (1990). ▪ <i>Engineering Contractors Assoc. of South Florida, Inc. v. Metropolitan Dade County</i>, 943 F.Supp. 1546 (S.D. Fla. 1996) (<i>Engineering Contractors I</i>). ▪ <i>Engineering Contractors Association of South Florida, Inc. v. Metropolitan Dade County</i>, 122 F.3d 895 (11th Cir. 1997) (<i>Engineering Contractors II</i>). ▪ <i>Hershell Gill Consulting Engineers, Inc. v. Miami-Dade County, Florida</i>, 333 F.Supp.2d 1305 (S.D. Fla. 2004). ▪ <i>Northeastern Florida Chapter of the AGC v. Jacksonville</i>, 508 U.S. 656 (1993). 	

² *Croson*, at 727-28.

B) TECHNICAL PROPOSAL
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CASES MGT WILL INCLUDE IN THE LEGAL REVIEW

- *Phillips & Jordan, Inc. v. Watts*, 13 F.Supp.2d 1308 (N.D. Fla. 1998).
- *Thompson Building Wrecking Co., Inc. v. City of Augusta, Georgia*, 2007 U.S. Dist. LEXIS 27127 (S.D. Geo. March 14, 2007).
- *Virdi v. DeKalb County School District*, 2005 U.S. App. LEXIS 11203 (11th Cir. June 13, 2005).
- *Webster v. Fulton County, Georgia*, 51 F.Supp.2d 1354 (N.D. Ga. 1999).
- Other relevant cases from the Eleventh circuit.

TASK 4.0: PROCUREMENT AND PROGRAM POLICY REVIEW

RFP WORKSCOPE: 3. Review of City procurement policies, procedures and programs

Purpose: Investigate, document, and evaluate current City procurement and MBE/WBE program policies and MBE/WBE program implementation.

Policy Review will include documents, organization charts, and interviews with relevant personnel.

MGT will conduct an in-depth review of contracting and program policies and procedures, the degree to which they are practiced, and their impact on firms attempting to do business or doing business with the City or its prime contractors.

MGT will work closely with the City project manager and other key staff to gather documentation such as procurement regulations, procurement manuals, organization charts, procurement flow diagrams, information on waivers and good faith efforts, and details regarding race-neutral program components.

MGT will conduct a careful examination of these contracting and program policies, legislation, and administrative rules and regulations. We also will conduct in-person or virtual interviews with key internal stakeholders, such as procurement staff, local officials, and diversity business program staff.

TASK 5.0: DATA ASSESSMENT, COLLECTION, AND PREPARATION

RFP WORKSCOPE: 4. Contract and subcontract data collection

Purpose: To identify the quantitative data necessary analyses required in a disparity study.

Data are the foundation of a reliable, statistically valid, and defensible disparity study. Disparity studies require a large body of information and data on the availability and utilization of vendors collected from many different sources. Proper collection and preparation of these data are essential for an accurate and defensible study. To ensure the availability of robust, statistically valid data for the study, the MGT team will follow a disciplined methodology to identify data sources, build the necessary databases, and prepare the data for analysis.

Data collection and preparation is the most time consuming, costly, and crucial component of a disparity study. Adequate time and resources must be allocated; and the City, consultant, and stakeholder expectations must be managed in order to resist hurrying this critical task.

Collecting relevant and accurate contract data is the most time consuming and most crucial part of a disparity study. The utilization data findings contribute directly to



the geographic and product market analysis, availability analysis, and anecdotal data collection. To do it well, it must not be rushed; there must be sufficient time and resources committed to this task from the beginning of the project.

MGT will begin this task by submitting a detailed data query to the City to be completed by relevant staff in preparation for the kickoff meeting. The data query form will ask for descriptive information regarding prime and sub level contracting data. The exhibit below is an example of a prime level data query form.

Exhibit 4. Data Query Form
[CLIENT] DISPARITY STUDY DATA QUERY



INDUSTRY: CONSTRUCTION | PROFESSIONAL SERVICES | SUPPLIES | MANUFACTURED ITEMS

Please click or circle one. **Complete one form for each industry.** If you are completing the form electronically, save with the specific industry in the file name.

Please indicate the data available by entering an "E" for data stored electronically or an "H" for data stored as hard copy in the FY columns; enter an "N" for data not available.

This form has 3 pages, one each for (1) prime level data, (2) DBE sub data, and (3) NON-DBE sub data.

PRIME CONTRACT DATA	FY14	FY15	FY16	FY17	FY18	NAME OF FILE DATA IS IN	CONTACT PERSON W/PHONE NUMBER & EMAIL ADDRESS	COMMENTS
Unique identification code or number for prime contract/purchase								
Unique identification code or number for prime contractor, such as vendor number								
Contract title								
Business name of prime contractor/vendor								
Start date of contract/purchase								
End date of contract/purchase								
Original dollar amount of prime contract/purchase award								
Total contract/purchase amount, inclusive of all change orders (final amount paid to prime)								
DBE goal percentage for original contract/purchase (if applicable)								
DBE goal percentage for change orders (if applicable)								
Department for which work was performed								
Type(s) of funds used (Federal vs State)								
Short description of services performed, or goods supplied by prime contractor								
DBE/Non-DBE status of prime contractor (including race, ethnicity, and sex)								
Prime contractor/vendor address, email address and telephone number								
Prime contractor/vendor contact person and title								

We will assess and confirm the City data that can be used for the purposes of this study. We will assess prime and subcontractor records using awards and payment data, vendor identification, and where the appropriate data are located and the retrieval process.

Based on the findings from the data query process, MGT will develop comprehensive Data Collection Plans that detail the data we will collect, the format of the data, and data limitations. Our team is experienced collecting data from multiple data systems including electronic contract files, financial software systems and hard copy records.



During this evaluation process, we will determine whether the City has sufficient subcontracting records within its own data for the study. It is not unusual for governments to have adequate MBE/WBE subcontracting records, but lack adequate non-MBE/WBE subcontracting records. If the City does not have adequate non-MBE/WBE subcontracting records, we will collect the subcontracting data directly from the prime firms. This is the method recommended in the National Cooperative Highway Research Program Report 644 for the national model disparity study.

We will follow the subcontracting data collection process detailed in Appendix A of the National Cooperative Highway Research Program Report 644 that provides national model disparity study guidelines. We are one of only two teams who perform this task.

Final data preparation is a resource intensive task. It requires extensive data enhancement including:

- ◆ Creating and/or cleaning variable names and data definitions.
- ◆ Updating incorrect or missing addresses, race/gender, and certification information.
- ◆ Assigning commodity codes and type of work descriptions.
- ◆ Identifying location of firms by county and state.
- ◆ Ensuring field values are consistent with regard to firm name, contact information, race/gender, industry code.
- ◆ Removing or reconciling duplicate records.
- ◆ Eliminating unnecessary records such as payments to other governments, employee reimbursements, utility payments, and other assorted expenditures that are often discovered in contracting and procurement data.

Often a firm's remittance address, as opposed to the local office, is presented in the vendor-related data we obtain. Therefore, MGT conducts additional research on firms not located within the local area to determine whether there is an office in the local area so that firms that are actually located in the potential geographic area are accurately recorded.

MGT will collect diverse business and/or vendor lists from other governmental agencies, trade associations, and business organizations, and combine those lists into a Master Vendor Database. This database will be used to update race, ethnicity, and/or gender of utilized firms and will be utilized in the anecdotal activities.

TASK 6.0: UTILIZATION ANALYSIS

RFP WORKSCOPE: 7. Utilization analysis

Purpose: Identify the City's prime and subcontracting and purchasing activities to determine the utilization of firms.

MGT will conduct utilization analyses on City contracts awarded during the study period of 2016 to 2020. Analysis will include contracts for construction, construction-related professional services, general

services and goods and commodities contracts. This process involves examining dollars let in the relevant market area for each procurement category during each fiscal year of the study.

We will conduct a prime-only analysis as well as an overall utilization analysis of all contracting and subcontracting records.

MGT will provide the aggregated utilization analysis by:

- ▶ Procurement categories: construction, professional services, goods and other services.
- ▶ NAICS commodity code.
- ▶ Year and in summary.
- ▶ Dollar amount and percentages.
- ▶ Business ownership classification (race/ethnicity and gender).
- ▶ Certification (certified and non-certified).

TASK 7.0: RELEVANT GEOGRAPHIC MARKET AND PRODUCT MARKET AREA

RFP WORKSCOPE: 5. Definition of relevant geographic market area and subindustries for the study

Purpose: Identify the City's relevant geographic and product markets.

MGT will conduct geographic and product market area analyses of the utilization data to determine the markets to adhere to when identifying available firms. The **geographic market** analysis will be conducted using the agreed upon and most comprehensive sources of procurement data to determine vendor locations (e.g., MSA, counties) that represent a majority of the City contract expenditures. The courts have accepted the use of counties as standard geographic units in conducting equal employment opportunity and disparity studies and will be used for this study. MGT will adhere to this approach since county boundaries are externally determined, so there are no subjective determinations. The **product market** analysis will use the procurement data to determine which industries (i.e., NAICS commodity codes) represent the majority of the City's contracts.

MGT uses the 75 percent standard when determining relevant market areas. In other words, we identify the locations and industries that capture 75 percent of the procurement dollars spent. The 75 percent rule is generally accepted in antitrust cases and has been accepted as precedent in other relevant areas.

TASK 8.0: AVAILABILITY ANALYSIS

RFP WORKSCOPE: 6. Availability analysis

Purpose: Provide availability estimates of firms in the City's relevant markets.

Using the geographic and product market parameters, MGT will calculate availability estimates of ready, willing, and able firms using the true custom census method detailed in the NCHRP report for recommended disparity study procedures.



Many firms use the words “custom census” to describe their availability analysis; however, upon closer review it is evident that they are *not* following the true custom census guidelines. Typically, departures from the guidelines include:

MGT is the only firm using the true custom census in its entirety as detailed in the national model disparity study guidelines.

- ◆ Requiring firms to participate in a lengthy survey in order to be included in the availability analysis.
- ◆ Omitting steps, such as not conducting a race/gender misclassification/non-classification survey.
- ◆ Failing to conduct a product market analysis to restrict availability of firms to the industries in the top spend of the agencies contracting.

MGT is the *only* firm following the national model disparity study guidelines for calculating availability recommended in Report 644, “Guidelines for Conducting an Availability and Disparity Study.” This is the only method under Part 26 that has received favorable judicial analysis.³

This report specifies seven specific steps for calculating availability:

1. Create a database of City contracts to identify utilization.
2. Identify the relevant geographic market based on the utilization data.
3. Identify the relevant product markets based on the utilization data.
4. Count all businesses in those relevant markets.
5. Identify listed minority- and women-owned businesses in those markets.
6. Verify the ownership status of listed minority- and women-owned businesses.
7. Verify the ownership status of all other firms.

In previous sections, MGT detailed its methodology for achieving steps 1 through 3 above. To obtain a count of all firms in the relevant markets, MGT will procure a comprehensive download of businesses in the relevant geographic and product markets from Dun & Bradstreet (D&B). As part of our data collection efforts, MGT will identify and obtain lists of minority- and women-owned firms from relevant certifying entities, other local governments, and national directories of MBE/WBE firms in order to supplement the D&B data with race and gender data. Once we have a complete and clean database of all available firms in the relevant markets from D&B and City certification and registered vendor lists, we will create a random stratified sample of firms by ownership category and industry code. We will conduct a survey of the firms in this sample to verify race and gender information for the firm owner. Results of the survey are then extrapolated to the full scale of the applicable universe to arrive at an estimation of available firms by ethnicity/gender classification and procurement category.

MGT will provide availability analysis weighted by NAICS code expenditure and disaggregated by:

- ◆ Procurement categories: construction, professional services, goods and other services.

³ *Sherbrooke*, 345 F.3d at 973; see *Concrete Works IV*, 321 F.3d at 966 (custom census was “more sophisticated” than earlier studies using Census data and bidders lists).



- ◆ NAICS commodity code.
- ◆ Year and in summary.
- ◆ Dollar amount and percentages.
- ◆ Business ownership classification (race/ethnicity and gender).

The custom census does not introduce capacity-like variables (e.g., age of the firm, revenues, etc.) into the availability estimates. As explained in Appendix B, Understanding Capacity, in the National Study Guidelines, this would import the current effects of past discrimination into the analysis. Proper statistical analysis should not control for the variables affected by the behavior sought to be isolated. MWDBEs being newer, smaller, and less competitive is potentially a result of the discrimination sought to be remedied. If a methodology eliminates firms based on such “capacity” variables, then it is importing the results of discrimination into the analysis meant to identify discrimination. The courts⁴ have rejected the need for attempting to control for firm qualifications such as revenues, employees, experience, etc., because it is wrong to use the outcomes of discrimination as the measure of a race-neutral market.

TASK 9.0: PUBLIC SECTOR DISPARITY ANALYSIS

RFP WORKSCOPE: 8. Disparity analysis

Purpose: Establish whether there is there a statistically significant disparity between the utilization of firms and their availability in the City’s markets.

To demonstrate an evidentiary basis for enacting a race-conscious program and to satisfy *Croson’s* compelling interest prong, governmental entities must present evidence of underutilization of MBE/WBE businesses that would give rise to an inference of discrimination in public contracting.⁵ If disparity can be shown, a *prima facie* case may be established if the differences between utilization and availability are large or statistically significant. Appropriate statistical tests must be used to determine if significant differences exist between the estimates of availability and utilization of firms. Therefore, MGT will determine disparity by creating a disparity index, as well as using statistical significance testing.

The disparity analysis compares utilization with availability to determine whether there is a disparity between the utilization and availability of firms. MGT will calculate for disparity for each of the study’s procurement categories and ownership classifications. A disparity index of 100 indicates the levels of utilization and availability are similar. A disparity index of 80 or lower is the threshold for establishing substantial disparity.

The disparity index is a number that shows how actual utilization compares to the ideal utilization we would expect to see based on the availability of firms in their respective categories.

⁴ *Concrete Works of Colorado, Inc. v. City and County of Denver*, 321 F.3d 950, 981, 983 (10th Cir. 2003), cert. denied, 124 S.Ct. 556 (2003) (“M/WBE construction firms are generally smaller and less experienced because of discrimination...”

⁵ *County of Richmond v. Croson*, at 509.

This approach is based on the Equal Employment Opportunity Commission’s (EEOC) *80 percent rule* used in calculating employment disparity. The 80 percent rule has widespread acceptance in the field and has been accepted by the Supreme Court as an appropriate disparity threshold.

After calculating the various disparity indices, MGT will conduct statistical significance testing to determine whether any disparities seen in the City’s procurement categories are (a) substantial in nature and (b) can be reasonably interpreted as non-random. MGT’s proven analytic and statistical methodologies produce results that are accurate, well-reasoned, and legally defensible.

TASK 10.0: PRIVATE MARKET DISPARITY AND NON-GOAL ANALYSES

RFP WORKSCOPE: 9. Quantitative analysis of marketplace conditions.

Purpose: Identify whether there is disparity in un-remediated markets where there are no goals for contracting.

The goal of these analyses is to determine whether discrimination exists in the private sector contracting market. This helps to identify what occurs in the absence of an affirmative program.

Private market and non-goals analyses serves to illustrate what occurs in markets that do not have affirmative programs to ameliorate contracting practices.

Our private sector model includes:

Nongoal Analysis - MGT will conduct a comparative analysis of prime contractor utilization of MBE/WBE firms on project without goals, should the data allow.

Disparities in Self-Employment - MGT will provide a statistical analysis of disparities in entry into and earnings from construction self-employment using data from the Public Use Micro Sample (PUMS) from the U.S. Census Bureau. MGT will present results from a logit model to estimate self-employment disparities for minorities and women.

Disparities in the Marketplace - MGT will examine disparities for minorities in the marketplace by using U.S. Census Bureau’s 2012 Survey of Business Owners (SBO). SBO provides data on economic and demographic characteristics for businesses and business owners by geography (such as the City’s area), industries defined by NAICS codes, firm sales, firm employment size, and business ownership classification. The most recent data, 2012 SBO, was released in 2016 and will be used in this study.

Commercial Construction activity based on Permits Data - MGT will examine the utilization of MWDBE firms in the private sector using commercial permits data. The value in examining permits is they offer up-to-date records of actual construction activity undertaken in the City’s marketplace.

Credit Market Analysis: MGT will use national data to evaluate issues related to access to and cost of credit for minority and women owned firms as compared to non-minority owned firms. We also will provide analysis for the City area using information collected in our vendor survey.

Regression Analysis: The regression analysis is a critical component in determining the effect of race on a firm’s earnings. We will conduct a regression analysis that controls for factors other than race and gender that may account for disparities in utilization, such as age, education, number of employees, etc.



Once these factors are controlled so they are all equal among the MBE/WBE and non-MBE/WBE firms in the analysis, if disparity remains related to earnings, we can infer a potential causal relationship of race on a firm's earnings.

TASK 11.0: ANECDOTAL DATA COLLECTION AND ANALYSIS

RFP WORKSCOPE: 10. Qualitative analysis of marketplace conditions.

Purpose: Solicit information about experiences of discrimination and impacts of the City's application of procurement and program practices.

Anecdotal evidence is a crucial component of a defensible disparity study and is important in meeting strict scrutiny. It helps to identify strong evidence of discrimination, demonstrating a compelling interest, and with crafting recommendations that are narrowly tailored to the City and its market. It can be probative of a continuing need for remedial measures when a government that has had a race-conscious program in place for many years and its contracting records reflect the impact of the program and may not show disparity. This does not necessarily mean that discrimination has ended and there is no longer a need for a remedial program. Anecdotal evidence can shed light on deeply imbedded discriminatory practices and on what the market might be like if there was no remedial program. The information obtained in this component provides information about the effectiveness of current programs and policies as well as suggestions for improvements.

Our approach for gathering and analyzing the anecdotal information is an enhanced and collective approach. We use several methods to collect this vital information:

- ▶ 2 community meetings
- ▶ 40 in-depth interviews with local businesses
- ▶ 5 stakeholder interviews
- ▶ A survey of vendors

TASK 12.0: RECOMMENDATIONS

RFP WORKSCOPE: 11. Analysis of remedies.

Purpose: Identify actions the City can take in its procurement and program policies to create a level playing field for all firms.

MGT has an extensive repository of best practices that can be tailored for the City to help remedy disparity and improve purchasing and program administration.

MGT will review the data and information gathered and the findings of all analyses and develop recommendations for the City to consider regarding its procurement and program policies and practices that would help to level the playing field for all firms.

The recommendations will detail multiple race/gender neutral initiatives and, if supported by the evidence, a recommendation regarding race/gender conscious measures. Suggestions may be provided for program administration and monitoring; reporting and data record keeping and storage practices; consideration of a small business program; unbundling large contracts; and supportive services.

TASK 13.0: GOAL SETTING

RFP WORKSCOPE: 11. Analysis of remedies.

Purpose: To establish an annual aspirational goal for the City.

MGT adheres to the DOT’s recommended method of goal setting. We will provide annual aspirational goals per industry for the City’s contracting. In order to meet the narrow tailoring requirement, the City must set project-specific goals rather than apply the aspirational goal to all projects. We can provide some guidance regarding this if requested.

STEP ONE – DETERMINING THE BASE FIGURE

This calculation can be simply dividing the number of MBE/WBE firms by the total number of firms in the relevant market.

However, the DOT recommends weighting the availability estimate based on the percentage of spend for each category or industry code. For the aspirational goal, therefore, we will provide a weighted estimate of availability. The calculation is weight times availability.

We will identify availability for each industry category, weighting the estimate by the spend in the industry category.

STEP TWO – ADJUSTING THE BASE FIGURE

The DOT requires consideration of an adjustment to the Step One calculation so that the goals are as accurate as possible. Step Two requires recipients to consider evidence of the effects of the MBE/WBE Program and historical and current discrimination on MBE/WBE availability and potentially adjust the Step One figure of availability “but for” the effects of discrimination. Evidence we may consider includes past participation; evidence from other disparity studies conducted in the City’s market area; statistical disparities in observed in the private market; or any other data or information that would help to better measure the percentage of work MBE/WBEs would be likely to obtain in the absence of discrimination.

MGT will fully explain a Step Two adjustment and the sources relied upon or will provide an explanation about why no adjustment is recommended.

TASK 14.0: DEVELOP DRAFT AND FINAL REPORTS

RFP WORKSCOPE: 12. Presentations, reports and other deliverables

Purpose: Provide the City with documentation regarding disparity in its markets and recommendations to improve its procurement and program practices in an effort to level the playing field for all firms.

MGT’s Disparity Study report will be a comprehensive document that captures all aspects of the study and presents the findings in a well-organized, easily understood format. The report will fully explain all study findings and recommendations. It will present the study’s legal framework and provide complete discussions of the methodologies used, including the regression models and other statistical analytics. We also will provide copies of the data files and anecdotal instruments developed during the study.

Exhibit 5 lists the chapters that will be included in the final report.

After the Final Disparity Report is accepted, MGT will prepare and facilitate a presentation for the City.



Exhibit 5. Sample Table of Contents

[CLIENT] Disparity Study PUBLISHED 2020		TABLE OF CONTENTS	
TABLE OF CONTENTS		CHAPTER 5. ANECDOTAL ANALYSIS 5-1	
CHAPTER 1. INTRODUCTION 1-1		5.1. INTRODUCTION 5-1	
1.1. BACKGROUND 1-1		5.2. METHODOLOGY 5-1	
1.2. LEGAL FRAMEWORK 1-1		5.3. DEMOGRAPHICS 5-5	
1.3. OVERVIEW OF STUDY APPROACH 1-2		5.4. FINDINGS 5-8	
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CHAPTER 2. POLICY SUMMARY 2-1		5.6. STAKEHOLDER INTERVIEWS 5-19	
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2.5. M/WBE GOALS AND INCENTIVES 2-8		6.3. RECOMMENDATIONS 6-3	
2.6. REPORTING M/WBE UTILIZATION 2-11		APPENDICES	
2.7. M/WBE PROGRAM OFFICES 2-12		APPENDIX A. DETAILED MARKET AREA ANALYSES	
2.8. OTHER SUPPORT FOR VENDORS 2-14		APPENDIX B. DETAILED UTILIZATION ANALYSES	
CHAPTER 3. MARKET AREA AND UTILIZATION ANALYSES 3-1		APPENDIX C. CUSTOM CENSUS SURVEY INSTRUMENT	
3.1. INTRODUCTION 3-1		APPENDIX D. SURVEY OF VENDORS INSTRUMENT	
3.2. DATA COLLECTION AND MANAGEMENT 3-1		APPENDIX E. FOCUS GROUP GUIDE	
3.3. MARKET AREA ANALYSIS 3-2		APPENDIX F. IN-DEPTH INTERVIEW GUIDE	
3.4. UTILIZATION ANALYSIS 3-6		APPENDIX G. PRIVATE SECTOR ANALYSIS	
CHAPTER 4. AVAILABILITY AND DISPARITY ANALYSES 4-1		APPENDIX H. SURVEY OF VENDORS DEMOGRAPHICS	
4.1. INTRODUCTION 4-1		APPENDIX I. LIST OF TRADE ASSOCIATIONS	
4.2. AVAILABILITY ESTIMATIONS 4-1		APPENDIX J. STAKEHOLDER INTERVIEW GUIDE	
4.3. DISPARITY ANALYSES AND SIGNIFICANCE TESTING 4-10			
4.4. CONCLUSIONS 4-17			

To ensure the report meets the City’s needs and expectations, MGT’s report development process is iterative and collaborative. Throughout the study period, MGT will provide the results of analysis, preliminary findings and other interim work products including draft chapters, to the City for review and comment. As the study concludes, we will compile all draft chapters, incorporating all feedback, and prepare an executive summary to create the final report.

WORK PLAN TASKS

In this section we provide a very concise list of high-level tasks for each component.

I. PROJECT MANAGEMENT

Establishes a direct path to successful study completion.

1. Create a work plan for the study.
2. Establish communication protocols.
3. Maintain regular communication with the City.
4. Monitor all study tasks and ensure adherence to study timeline.

2. PROJECT INITIATION

Establishes work plan and communication methods.

1. Schedule kick off meeting.

2. Submit data query forms.
3. Prepare draft outreach plan.
4. Establish SharePoint site.
5. Begin work on website.

3. LEGAL REVIEW

Outlines legal standards to follow for study.

1. Review all cases relevant to City disparity study.

4. PROCUREMENT AND PROGRAM POLICY REVIEW

Evaluates policy practices.

1. Review all policy documents, organization charts, and reporting forms.
2. Interview City personnel involved with contracting, procurement, and program administration.

5. DATA ASSESSMENT, COLLECTION, AND PREPARATION

Identifies and prepares quantitative data.

1. Meet with City staff regarding completed data query forms.
2. Obtain and evaluate examples of data discussed.
3. Clarify all issues related to data and submit formal data request.
4. Collect missing data using internet, other databases, City assistance, and/or prime records.
5. Clean and prepare all contracting data.
6. Collect, clean and merge lists of MBE/WBE and non-MBE/WBE firms.

6. UTILIZATION ANALYSIS

Quantitative analysis of City expenditures by location and type of firm.

1. Calculate utilization of firms by industry, NAICS code, race/gender of firm owner, and location of firm.

7. GEOGRAPHIC AND PRODUCT MARKETS

Identifies City relevant markets.

1. Calculate the zip codes and counties that account for the top 75 percent of City spend.
2. Calculate the NAICS codes that account for the top 75 percent of City spend.

8. AVAILABILITY ANALYSIS

Provides estimate of availability by industry and firm type.

1. Download D&B data for all firms in City markets.
2. Create a stratified random sample of firms per industry.
3. Survey sample firms to verify race and gender of firm owner.
4. Apply survey results to availability database.
5. Calculate availability estimates by industry, NAICS code, and race/gender of firm owner.



9. DISPARITY ANALYSIS

Analyzes utilization and availability by industry and firm type.

1. Calculate disparity ratio by industry, NAICS code, and race/gender of firm owner.
2. Determine whether disparities identified are statistically significant.

10. PRIVATE MARKET AND NON-GOALS ANALYSIS

Provides analysis of disparity in un-remediated market.

1. Obtain, prepare, and analyze data for contracts without goals if data available.
2. Obtain, prepare, and analyze PUMS data regarding self-employment.
3. Obtain, prepare, and analyze SBO data regarding firm's presence in the marketplace.
4. Obtain, prepare, and analyze construction permits data.
5. Conduct regression analysis to control for factors other than discrimination related to disparity.

11. ANECDOTAL DATA COLLECTION AND ANALYSIS

Provides evidence related to discrimination and barriers in contracting practices.

1. Identify stakeholders related to the study including firms professional and business organizations.
2. Host community meetings.
3. Conduct business owner and organization representative one-on-one interviews.
4. Conduct vendor survey.

12. RECOMMENDATIONS

Provides suggestions for procurement and program administration.

1. Identify and present recommendations for policy and practice administration.

13. GOAL SETTING

Provides an annual aspirational goal.

1. Establish annual aspirational goal by industry.

14. FINAL REPORT

Provides documented analysis of the City program and disparity analysis.

1. Prepare draft report compilation of component chapters.
2. Prepare executive summary.
3. Obtain feedback from the City.
4. Prepare final report.

DISPARITY STUDY TIMELINE

Based on MGT's vast experience conducting disparity studies and the requirements of the RFP, we anticipate it will take 14 months from project initiation to complete the City's study. **Exhibit 6** illustrates the timeframe associated with each task in our work plan.



Exhibit 6. Proposed Timeline

STUDY COMPONENTS	MONTH													
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Project Management	Active													
Project Initiation	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active
Legal Review	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active
Procurement and Program Policy Review	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active
Data Assessment, Collection, and Preparation	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active
Utilization Analysis	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active
Geographic and Product Markets	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active
Availability Analysis	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active
Public Sector Disparity Analysis	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active
Private Market and Non-Goals Disparity Analyses	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active
Anecdotal Data Collection and Analysis	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active
Recommendations	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active
Goal Setting	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active
Develop Draft and Final Reports	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active

PROPOSAL ASSUMPTIONS

The work plan and budget for this proposal were developed with several key assumptions about the project. Changes to these assumptions may impact both our methodology and project costs. We welcome the opportunity to meet with the City’s project manager to review these assumptions, validate or adjust these assumptions based on more complete information, and adjust the work plan and/or budget accordingly. Below, we present our assumptions:

1. There will be a designated senior manager assigned to the study to resolve any conflicts that may arise.
2. MGT expects to have complete and timely access to necessary documents and personnel.
3. Some tasks will be conducted concurrently, when possible.
4. The City will make any meetings or interviews a priority.
5. Meeting rooms will be arranged for, and used at, the expense of the City.
6. MGT will receive all requested electronic data either in Microsoft Excel, Access, or comma delimited file or any combination thereof.
7. MGT assumes the project management tools, cost accounting, and time keeping systems selected for this program will be common off-the-shelf software packages (e.g., MS Project) that do not require significant specialized knowledge of the software. More sophisticated applications may require more effort to implement and/or the assistance of a qualified vendor representative.
8. The report will make recommendations to the extent possible; some findings will not result in recommendations.

9. The City has the right to review and reject any MGT staff proposed for or assigned to this engagement.
10. MGT is willing to negotiate adjustments in the proposed cost should the City and MGT mutually agree upon reduction or increases to the scope of the project.
11. The City project manager will ensure comments on the draft report from select project stakeholders are consolidated into a single document and any conflicting comments are reconciled before delivering the comments to MGT.
12. Final reports are assumed final, if we do not hear from the City within two weeks of report delivery (email or hard copy).

C) PRICE PROPOSAL

Based on our extensive experience and the requirements of the RFP, MGT proposes to complete the City’s study for a total cost of \$355,981, as detailed in **Exhibit 7**. This includes professional fees, subcontractor costs, travel⁶, and other expenses (survey, postage, etc.).

Exhibit 7. Proposed Cost by City Workscope Tasks

WORKSCOPE TASKS	HOURS	PROF. FEES	SUB. FEES	TRAVEL EXP.	OTHER EXP.	COST PER TASK
1. Work Plan, Project Administration, and Meetings	177	\$36,065	\$0	\$3,087	\$1,370	\$40,523
2. Legal Review	28	\$3,840	\$0	\$0	\$134	\$3,974
3. Review of City Procurement Policies, Procedures, and Programs	46	\$13,490	\$0	\$0	\$472	\$13,962
4. Contract and Subcontract Data Collection	360	\$48,600	\$0	\$5,305	\$1,887	\$55,792
5. Definition of Relevant Geographic Market Area and Subindustries for the Study	108	\$15,440	\$0	\$0	\$540	\$15,980
6. Availability Analysis	478	\$30,940	\$56,250	\$0	\$13,402	\$100,592
7. Utilization Analysis	108	\$14,440	\$0	\$0	\$505	\$14,945
8. Disparity Analysis	54	\$7,080	\$0	\$0	\$248	\$7,328
9. Quantitative Analysis of Marketplace Conditions	84	\$10,980	\$0	\$0	\$384	\$11,364
10. Qualitative Analysis of Marketplace Conditions	236	\$29,790	\$20,250	\$3,081	\$1,859	\$54,981
11. Analysis of Remedies	64	\$13,480	\$0	\$0	\$472	\$13,952
12. Presentations, Reports, and Other Deliverables	92	\$18,540	\$0	\$3,284	\$764	\$22,588
GRAND TOTAL	1,835	\$242,685	\$76,500	\$14,758	\$22,038	\$355,981

Exhibit 8 provides the hourly rate and assigned hours for each professional and support/administrative staff, as well as subcontractors.

Exhibit 8. Staff Rate and Hours

STAFF	RATE	ASSIGNED HOURS	TOTAL COST
F. Seamon	\$375	64	\$24,000
B. Ledford	\$370	16	\$5,920
L. Browne	\$355	44	\$15,620
A. Bernal	\$175	302	\$52,850
L. Opheim	\$155	336	\$52,080
V. Mitchell	\$225	65	\$14,625
W. Fiorito	\$130	210	\$27,300
K. Miller	\$105	370	\$38,850
Editorial	\$130	88	\$11,440
Abelita	\$225	90	\$20,250
Oppenheim	\$225	250	\$56,250
Litigation Support	\$350	As Needed	As Needed

⁶ Costs related to travel may not be invoiced due to COVID-19 travel restrictions. Only actual costs incurred will be invoiced.

D) QUALIFICATIONS

FIRM INTRODUCTION

MGT was established in 1974 by a group of former public sector leaders to provide management consulting services to assist public sector clients operate more efficiently, effectively, and with more accountability to the communities they serve. Since then, MGT has flourished as a full-service management consulting firm, providing high quality management consulting services to public sector clients nationwide. MGT's clients appreciate and benefit from high-quality quantitative and qualitative analysis, detailed findings, and objective recommendations that are practical and actionable.

MGT has a **46-year history** of providing innovative yet practical solutions to public sector clients. We provide objective, creative, expert services in the areas of diversity, equity, and inclusion, human capital, finance, technology, program reviews, and strategic planning. We draw on the expertise of our highly qualified staff, many whom had prior careers at city-, county-, and state-level government offices. This insider's knowledge of government operations and structure gives MGT a competitive advantage and an ability to hit the ground running from the very start of a project.

MGT maintains **two offices in Florida**—Tampa (headquarters) and Tallahassee—with additional locations across the country.

NATIONAL FIRM LOCAL FOCUS

CALIFORNIA
Sacramento | Pasadena

COLORADO
Denver

FLORIDA
Tallahassee | Tampa

KANSAS
Wichita

ILLINOIS
Chicago

MASSACHUSETTS
Boston

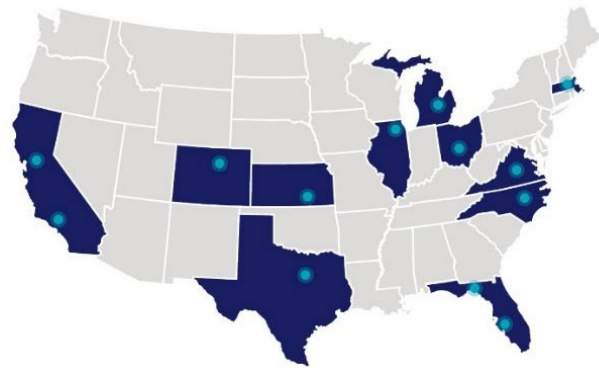
MICHIGAN
Bay City

NORTH CAROLINA
Raleigh

OHIO
Columbus

TEXAS
Dallas

VIRGINIA
Richmond



MGT has successfully worked with clients on **more than 13,000 projects nationally** providing research and consulting services. A significant portion of MGT's engagements is repeat business, reflecting our clients' satisfaction with the quality of services delivered by MGT and our ability to exceed client expectations. MGT's commitment to quality consulting is evidenced by extensive past performance delivering an extensive range of services to a variety of educational institutions, state and local governmental agencies, and nonprofit organizations. Below is a representative sample of MGT's offerings:

BUSINESS PROCESS REENGINEERING | COMMUNITY COLLABORATION | COSTING SERVICES
DEMOGRAPHIC STUDIES | **DISPARITY STUDIES** | **DIVERSITY, EQUITY, AND INCLUSION STUDIES**
EFFICIENCY AND EFFECTIVENESS REVIEWS | FACILITY MASTER PLANNING | FINANCIAL ANALYSIS

FISCAL IMPACT STUDIES AND MODELS | FUNDING STUDIES AND MODELS
HR CONSULTING SERVICES | IT/CYBER SECURITY CONSULTING | MARKET AND OPINION RESEARCH
NEEDS ASSESSMENTS | ORGANIZATIONAL/MANAGEMENT REVIEWS | PERFORMANCE AUDITS
POLICY RESEARCH | PROGRAM EVALUATION | PROGRAM REVIEWS | STRATEGIC PLANNING

More so than any other firm, we understand the challenges, environment, and context in which the study will be conducted. From MGT's perspective this is a tremendous benefit to the City. This means the City can be confident it will benefit from an expertly executed disparity study that is premised on the City being treated as a VALUED CLIENT from the start of the study to its successful conclusion. We view conducting a disparity study as a partnership based on transparency, communication, and mutual agreement on expectations and outcomes.

QUALIFICATIONS

MGT has over **40 years of local government experience** in 50 states and **30 years of experience** completing disparity research studies, which conform to applicable federal, state, and local laws (including applicable case law and regulations) and thus providing the legal framework and guidelines for conducting contracting and procurement disparity studies.

In 1990, MGT completed our first post-*Croson* disparity study for the City of Tallahassee (FL) and has gone on to successfully complete more than 220 disparity and disparity-related (M/WBE program implementation, litigation, etc.) studies for municipalities across the country. MGT has a proven track record of conducting legally defensible disparity studies that have played a vital role in assessing and documenting marketplace discrimination, if any, on a national scale.

At the conclusion of an MGT study, our clients feel confident they have a study that is thorough, comprehensive, and legally defensible – the most important standards for judging disparity studies.

MGT's experience with the collection, management, and analysis of large, complex sets of quantitative and qualitative data pertaining to race, disability, and gender issues is unmatched in comparison to other firms. This experience has positioned MGT to conduct studies which are responsive to client needs. We have a team of disparity study experts well-versed in all areas critical to conducting disparity studies including statistical analysis, disparity analysis, policy analysis, anecdotal analysis, econometric analysis, legal analysis, M/WBE program operations, and other areas important to the conduct of an accurate, reliable, valid, and legally defensible study. Our national experience conducting a diverse range of disparity studies and related research supported by a proven and rigorous research methodology gives MGT the necessary elements to provide a high-quality, legally defensible disparity study for the City.

The depth and quality of our experience is matched by our study execution and our methodology and approach to evaluating barriers to inclusion and the prevalence, magnitude, and extent of marketplace discrimination, if any, against M/W/DBEs. The framework, approach, and methodology for study execution is premised on a set of research questions and assumptions grounded in legal, statistical, econometric, and analytical research that is time-tested and proven to be reliable, valid, and legally

defensible. Our research framework, approach, and methodology adhere to the highest and strictest standards of social science research and is clearly articulated in a concise, but detailed technical work plan that includes all necessary requirements and elements for a comprehensive and legally defensible disparity study.

PROJECT TEAM

Conducting a rigorous and legally defensible disparity study is a very serious undertaking requiring significant organizational and staff capacity and expertise. The most critical elements are the experience, knowledge, expertise, and skills of the disparity study team who will conduct the study. To meet your needs for a comprehensive study, we have assembled the most experienced and skilled team in the disparity study business.

MGT's disparity study team has **over 50 years of combined firsthand experience** conducting disparity research studies aligned with prevailing industry and legal standards. The depth and breadth of our team's experience demonstrates we are ideally suited to conduct the City's disparity study and provide recommendations and solutions which result in greater access, opportunities, and equity in contracting and procurement.

MGT's disparity study team is comprised of **Florida-based core team members and local partners** who are highly skilled and experienced researchers who have conducted disparity studies throughout the United States. Furthermore, our experts:

We bring our deep knowledge and understanding of Florida studies and national M/WBE program best practices and innovative solutions to address disparities in contracting and procurement.

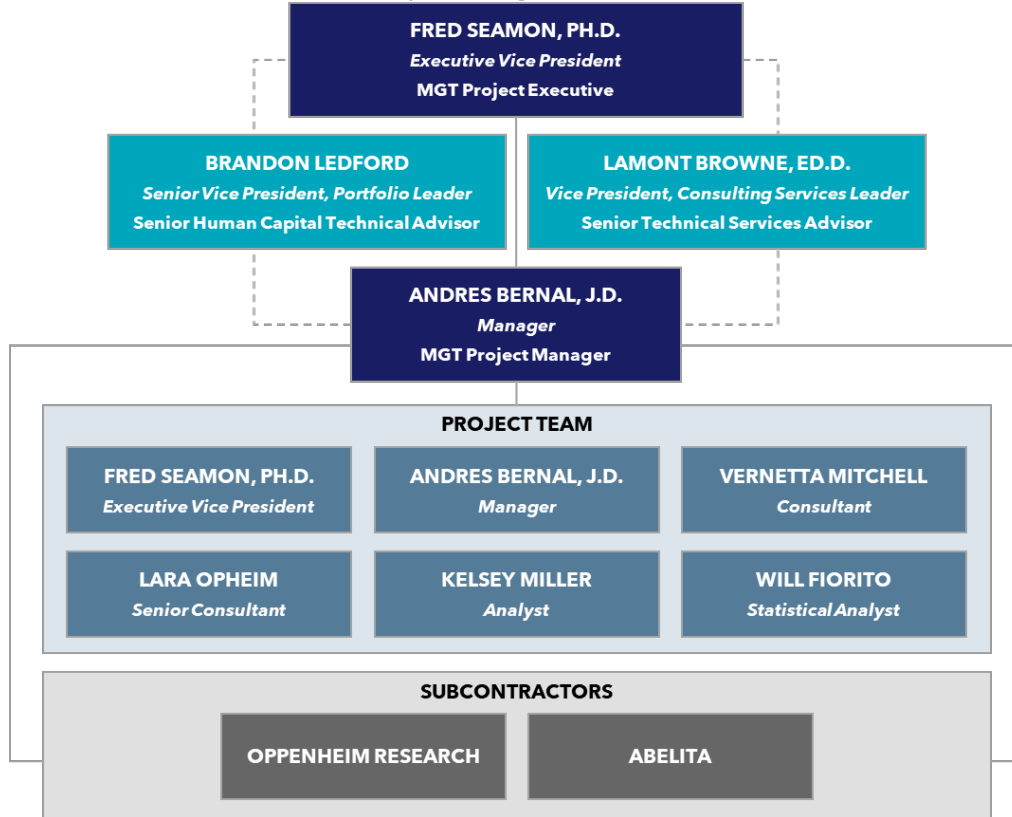
- ◆ Have provided the full range of elements and components of a comprehensive disparity study necessary to conduct a rigorous analysis and evaluation of procurement and contracting practices.
- ◆ Have completed numerous disparity studies for municipalities conducting a disparity study for the first time.
- ◆ Far exceed the qualifications and experience requirements in the City's RFP.
- ◆ Have direct experience guiding and steering entities through the complexities inherent in conducting a comprehensive disparity study.
- ◆ Have worked together as a productive team on studies similar in scope and magnitude to the City's study.
- ◆ A clear understanding of responsibilities, assignments, and deliverables to ensure an efficient and effective project outcome within budget.

Another distinguishing feature of the team is their in-depth experience working on municipal consulting projects related to operations, processes, and systems. As such, our team has a depth and breadth of experience in the municipal regulatory and legal environment that you simply will not find with firms who only conduct disparity studies.



The organizational structure of the project team identifying the reporting structure and areas of responsibility is illustrated in **Exhibit 9**. The core MGT team has worked together on numerous disparity studies throughout the country.

Exhibit 9. Proposed Organizational Structure



Our proposed team has more in-depth knowledge and expertise conducting large-scale disparity studies than any other firm. Most important, our team has a national reputation and a long and distinguished track record conducting disparity studies that exceed standards for accuracy, reliability, and legal defensibility.

- ◆ **Dr. Fred Seamon**, *Project Executive*, will provides executive oversight, has 30 years of experience conducting disparity studies, and has played a major role in over 150 of MGT’s disparity studies. In his executive oversight role, he will ensure our team fulfills all study requirements. Dr. Seamon has led the disparity team as either the Project Executive or Project Manager on more than 30 studies and has played a key role in all of the disparity conducted by MGT in the past 30 years.
- ◆ **Mr. Andres Bernal**, *Project Manager*, holds a law degree (J.D.), as well as Master’s and Bachelor’s degrees in Economics, and has been performing disparity studies for over 15 years. He has expertise in statistical research, data, and survey analysis. Mr. Bernal is currently managing three disparity studies and has managed or served as disparity study project lead on more than eight studies in the last three years.

- ◆ **Mr. Brandon Ledford**, *Senior Technical Advisor*, will provide senior technical advice on contracts, project management, and human capital issues. Mr. Ledford is a Senior Vice President in the Consulting Solutions Group with varied experiences in human capital and is a certified project manager and change manager.
- ◆ **Dr. Lamont Browne**, *Senior Technical Advisor*, will be the main point of contact and support for client satisfaction. Dr. Browne is a VP in the Consulting Solutions Group and is a tenured leader in managing large-scale projects and leadership development.
- ◆ **Ms. Lara Opheim**, *Team Member*, is skilled with preparing data and analyses for relevant market, availability, utilization, and the private market. She also has conducted benchmark and workforce analyses for studies. She administers and provides analysis of online surveys using Qualtrics.
- ◆ **Ms. Vernetta Mitchell**, *Team Member*, will be the main point of contact with MGT’s subcontractors and will lead all anecdotal/outreach efforts.
- ◆ **Mr. Will Fiorito**, *Team Member*, is a disparity study research analyst with superior research and analytical skills. Since joining MGT he has played a key role in over a dozen disparity studies. He will assist with data collection, analysis, and reporting.
- ◆ **Ms. Kelsey Miller**, *Team Member*, assists the disparity team in developing market availability databases, assigning NAIC’s codes to vendors, and survey collection. She will assist with data collection, analysis, and reporting.

SUBCONTRACTORS

- ◆ **Abelita** will assist with the design and execution of the in-depth interviews, community engagement meetings, and stakeholder interviews.
- ◆ **Oppenheim Research** will assist with the design and execution of the custom census and vendor anecdotal surveys, including pilot testing survey instruments and providing input on draft and final survey instruments.

ON-SITE VS. OFF-SITE

Traditionally MGT’s work plan to complete a disparity study includes significant amount of time on-site for interviews, focus groups, etc. Due to COVID-19, MGT proposes to conduct tasks related to data collection and anecdotal activities via an online platform as needed, such as MS Teams, Zoom, etc. Should MGT need to meet with City staff on-site, the lead time to have MGT staff available is a minimum of one week. During project kick off, we will discuss meeting schedules and potential timing of onsite meetings.

MINIMUM QUALIFICATIONS

All of MGT’s proposed team members have worked on disparity studies within the past five years.

TALLAHASSEE CONSORTIUM (FL) | M/W/SBE DISPARITY STUDY

Executive-in-Charge: Fred Seamon

Team Members: Andres Bernal, Lara Opheim, Vernetta Mitchell, Will Fiorito

<https://blueprintia.org/wp-content/uploads/MGT-Disparity-Study-Final-Report-06.20.19.pdf>

D) QUALIFICATIONS



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CITY OF DALLAS (TX) | AVAILABILITY AND DISPARITY STUDY

Executive-in-Charge: Fred Seamon

Team Members: Andres Bernal, Lara Opheim, Vernetta Mitchell, Will Fiorito, Kelsey Miller

<https://dallascityhall.com/departments/public-affairs-outreach/DCH%20Documents/availability-disparity-study.pdf>

RESUMES

Resumes for assigned personnel are presented on the following pages. Disparity study personnel shall remain available during the entirety of the project throughout the term of the contract as long as they are employed by MGT. **The personnel described in our proposal are the senior-level professionals who will provide the services for this project.**



FRED SEAMON, Ph.D.

Executive Vice President
MGT CONSULTING GROUP



Dr. Seamon is a Bethune-Cookman University graduate and lived and worked in Daytona Beach for several years. He has over 35 years of consulting, research, and graduate teaching experience, and was the **project director for MGT’s first disparity study conducted in 1990**. Since that first study he has been involved in over 150 of MGT’s disparity studies.

While on the graduate faculty at Florida State University (FSU), he conducted major research studies related to disparate treatment and the impact of public policy on economic prosperity and economic segregation. As a member of the research faculty in the Pepper Institute (FSU), he conducted research on the adverse impact of social and economic policy on minority elderly populations.

While on the faculty in the Askew School of Public Administration and Public Policy at FSU, he taught graduate courses in human resources management, public policy, and action research, and was called upon regularly to provide a variety of research assistance and subject matter expertise to local and state government agencies in Florida and other states. He also served as the lead researcher for the Governor’s Racial and Ethnic Bias Study Commission lead several research teams for Florida Tax Watch. In addition, he has provided technical assistance and support to the Florida Advisory Council on Small and Minority Business Development.

His experience also includes providing consulting services analyzing the structure, operations, and systems of public sector organizations to identify operations efficiencies and process improvements. The dozens of operations reviews conducted by Dr. Seamon have included procurement and contracting operations, which adds a dimension to MGT’s disparity study team that other teams will not have. For over 30 years, Dr. Seamon has provided consulting services focused on policy and practices that adversely impact access and equity that result in disparate treatment.

In April 2020, Dr. Seamon was an invited participant in the White House Conference Call for African American Stakeholders on COVID-19 and the CARES Act.

AREAS OF EXPERTISE

- ◆ Qualitative research methods.
- ◆ Conducting research studies related to diversity, equity, and disparities in education, business, and human services.
- ◆ Community engagement and outreach.
- ◆ Policy analysis.
- ◆ Analyzing the structure, operations, and processes of public sector organizations and nonprofit agencies.

EDUCATION

Ph.D., Higher Education Administration, College of Education, Florida State University, 1976
 M.S.W., School of Social Work, Florida State University, 1973
 B.S., Sociology, Bethune-Cookman College, 1970
 Certified Mediator, Certified by Supreme Court of Florida, #06465c

PROFESSIONAL AFFILIATIONS

American Evaluation Association
 American Society of Public Administration
 Florida Academy of Certified Mediators
 Florida Advisory Council on Small and Minority Business Development
 International Personnel Management Association
 National Association of Workforce Development Professionals
 National Forum for Black Public Administrators



FRED SEAMON, Ph.D.

Executive Vice President
MGT CONSULTING GROUP

SAMPLE OF RELEVANT PROJECT EXPERIENCE

FLORIDA CLIENTS

- City of Fort Lauderdale | Disparity Study
- City of Hollywood | Availability Study
- City of Miramar | Disparity Study
- City of Pensacola | Disparity Study; Review of Small Business Enterprise Program
- City of Tallahassee | Disparity Study, Phase I & II; Minority Disparity Study
- City of West Palm Beach | Minority Disparity Study
- Florida Department of Transportation | Disparity Study (2)
- Hillsborough County Aviation Authority | Disparity Study Update
- Leon Consortium [County, School District] | MBE Fact-Finding Disparity Study
- Leon County | Disparity Study; Disparity Study Update, Phase I; Disparity Study Update; Purchasing Review
- Miami-Dade College | Disparity Study
- Miami-Dade County | Predisparity Study Planning Initiative
- Orange County | Disparity Study
- Orlando-Orange County Expressway Authority | Disparity Study
- Osceola County | Disparity Study
- Palm Beach County | Minority/Women Business Disparity Study
- Palm Beach County Schools | Disparity Study
- School Board of Miami-Dade County | Comprehensive Disparity Study
- South Florida Water Management District | Minority Business Availability and Utilization Study
- Tallahassee Consortium [City, County, Blueprint Agency] | M/W/SBE Disparity Study

CITY AND COUNTY CLIENTS

- City of Charlotte (NC) | Disparity Study
- City of Charlottesville (VA) | Disproportionate Minority Study
- City of Columbia (SC) | Analysis of Business Underutilization Causation
- City of Dallas (TX) | Availability and Disparity Study
- City of Dayton (OH) | Third Generation Disparity Study; Second Generation Disparity Study
- City and County of Denver (CO) | M/W/DBE Disparity Study and Registered Apprenticeship Study
- City of Greensboro (NC) | Disparity Study
- City of Hampton and Schools (VA) | Disparity Study
- City of Jersey City (NJ) | Disparity Study
- City of New York (NY) | MWBE Disparity Study; Local Hiring Analysis
- City of Portsmouth (VA) | Procurement Disparity Study
- City of San Antonio (TX) | Availability Study
- City of Tulsa (OK) | Business Disparity Study, Phase I & II
- City of Winston-Salem (NC) | Disparity Study
- Government of the District of Columbia (DC) | Capability and Capacity Analysis
- Charleston County (SC) | Disparity Study
- Dane County (WI) | Review of Racial and Social Equity
- DeKalb County (GA) | Disparity Study; MBE Implementation Plan; Documentation and Administrative Regulation Review
- Nassau County (NY) | Disparity Study, Phase I & II
- Prince George's County (MD) | Utilization and Availability Study



ANDRES BERNAL, J.D.

Manager
MGT CONSULTING GROUP



Mr. Bernal is an expert in quantitative research for disparity studies with over 15 years of experience. He is currently managing three disparity studies and has been the quantitative research leader on more than a dozen studies, spearheading collection of data, managing all levels of utilization and availability analyses, managing all levels of the various private sector analyses, and implementing new methodologies that incorporate the latest disparity study legal court cases. Mr. Bernal is well-practiced in conducting all aspects of disparity study research.

Prior to joining MGT, Mr. Bernal worked for the Nielsen company as a sector lead working for their largest client P&G. As a sector lead, he oversaw marketing-mix analytics work for such P&G multi-million dollar brands as Gillette, Venus, Crest, Oral-B, Vicks, Prilosec, Metamucil, Align, Dawn, Cascade, Pampers, Bounty, Puffs, and Charmin. These analytics gave the brands the tools necessary to optimize their media spending by calculating return on investments and volume sales generated by the various media vehicles. He also assisted his clients in understanding analytic solutions to marketing performance, pricing strategy, and assortment strategy in order to fully optimize in-market performance.

Mr. Bernal has expertise in economic theories, including Microeconomic Theory, Macroeconomic Theory, Econometrics, Urban Economics, Experimental Economics, Human and Labor Resource Economics, and Regression Analysis. He has done extensive research using statistics and mathematical computations to analyze data. Mr. Bernal has extensive experience in SAS, SPSS, database design, Excel, PowerPoint, File Maker Pro, Word Perfect, Microsoft Word, and conducting Internet research.

AREAS OF EXPERTISE

- ◆ Economics and statistical calculations
- ◆ Legal and social research
- ◆ Fluency in English and Spanish

EDUCATION

J.D., Case Western Reserve University School of Law, 2008
M.A., Economics, Georgia State University, 2003
B.S., Economics, Florida State University, 2001
Calculus I, II, and Calculus Based Statistics, Oxford College of Emory University

MEMBERSHIPS

Cincinnati Bar Association
American Economic Association

SAMPLE OF RELEVANT PROJECT EXPERIENCE

FLORIDA CLIENTS

- City of Fort Lauderdale | Disparity Study
- City of Miramar | Disparity Study
- City of Pensacola | Disparity Study
- City of Tallahassee | Litigation Support
- Hillsborough County Aviation Authority | Disparity Study Update
- Leon County | Disparity Study Update; Disparity Study
- Orlando-Orange County Expressway Authority | Disparity Study
- Osceola County | Disparity Study
- Tallahassee Consortium [City, County, Blueprint Agency] | M/W/SBE Disparity Study

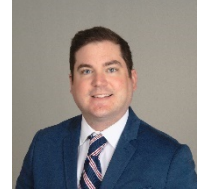
CITY CLIENTS

- City of Charlotte (NC) | Disparity Study
- City of Dayton (OH) | Second Generation Disparity Study
- City and County of Denver (CO) | M/W/DBE Disparity Study and Registered Apprenticeship Study
- City of Greensboro (NC) | Disparity Study
- City of Hampton (VA) | Disparity Study
- City of Jersey City (NJ) | Disparity Study
- City of New York (NY) | MWBE Disparity Study
- City of Phoenix (AZ) | Disparity Study and Update
- City of Portsmouth (VA) | Procurement Disparity Study
- City of Tulsa (OK) | Business Disparity Study, Phase II



BRANDON W. LEDFORD, MPP, PMP

Senior Vice President
MGT CONSULTING GROUP



Mr. Ledford is responsible for driving the growth and execution of MGT’s human capital and resource consulting services, which includes classification and compensation/salary studies, policy and procedure development, organizational reviews, and best practice research. For over ten years, he has assisted global clients in all industries with human capital, public policy, management consulting, revenue performance management, strategy, business transformation, data analytics, and strategic communications. Prior to joining the MGT leadership team, he was the Vice President overseeing the Human Resources and Policy and Compliance departments of a global technology company and has been a consultant for both Booz Allen Hamilton and Deloitte. Mr. Ledford also has interned for the U.S. Supreme Court and White House Office of Science and Technology Policy. He holds a Master of Public Policy from George Mason University’s School of Public Policy, a Bachelor of Arts from the Pennsylvania State University, is a certified Project Management Professional (PMP), and earned an Innovation and Entrepreneurship Certificate from Stanford.

AREAS OF EXPERTISE

- ◆ Human Capital
- ◆ Business Transformation
- ◆ Data Analytics
- ◆ Public Policy
- ◆ Strategic Communications
- ◆ Strategy

EDUCATION/CERTIFICATIONS

M.P.P., Health Policy, Science and Technology Policy,
George Mason University, 2011

B.A., Comparative Literature, Latin, The Pennsylvania State
University, 2006

Innovation and Entrepreneurship Certificate, Stanford
University, 2020

Project Management Professional (July 2013 – Present)

Lean Six Sigma Yellow Belt (August 2012 – Present)

HONORS

The Horatio Alger Scholarship, four consecutive years

Martha V. and Walter A. Pennino Endowed Scholarship

American Cancer Society Champion College Scholarship

Carolyn’s Compassionate Children Scholarship

The Harry W. Klinger University Scholarship, four
consecutive years

The Brandon Ledford Scholarship

SAMPLE OF EXPERIENCE

- Adams 14 School District (CO) | School Turnaround
- Beaufort County School District (SC) | Needs Assessment
- Brevard County School Board (FL) | Districtwide
Compensation Study
- Centre Area Transportation Authority (PA) |
Classification and Compensation Study
- CF Solutions | Classification and Compensation Study
- City of Apopka (FL) | Classification and Compensation
Study
- City of Gainesville (FL) | Executive Recruiting
- City of Hermiston (OR) | Classification and
Compensation Study
- City of Woodinville (WA) | Classification and
Compensation Study
- County of Glades (FL) | Employee Policy and Handbook
Development
- County of Lancaster (SC) | Classification and
Compensation
- Green River College (WA) | Classification and
Compensation Study
- Gulf Coast State College (FL) | Compensation and Class
Study
- Hawaii Health Systems Corporation | Classification and
Compensation Study; Executive Performance Review
System Design
- Hillsborough Area Regional Transportation Authority (FL)
| Classification and Compensation Study
- Hillsborough Community College (FL) | Administrator
Classification and Compensation Study
- Horry County Schools (SC) | Classification and
Compensation Study
- Indiana Department of Administration (IN) | School
Corporation Emergency Management Services
- Lancaster County (SC) | Classification and Compensation
Study
- Maryland Environmental Service | Classification and
Compensation Study

D) QUALIFICATIONS



BRANDON W. LEDFORD, MPP, PMP

Senior Vice President
MGT CONSULTING GROUP

- County of Maricopa (AZ) | Human Resources Services; Rate Methodologies & Recommendations
- County of Maui (HI) | Performance Audit
- County of York (SC) | Ongoing Classification and Compensation Services
- Disability Rights Florida | Classification and Compensation Study
- East Central College (MO) | Compensation and Classification Study
- Florida Atlantic University | Organizational Assessment
- Florida Department of Education | Review of Florida Safe School Assessment Tool
- Florida Development Disabilities Council | Classification and Compensation Study
- Florida Office of Program Policy Analysis and Government Accountability | Florida Clerks of Court Organizational Review
- Gogebic County (MI) | Classification and Compensation Study
- Navajo Nation | Compensation Study
- North Carolina Education Lottery | Compensation and Classification Study
- Pittsburgh Public Schools (PA) | Classification and Compensation Study
- Santa Fe College (FL) | Classification and Compensation Study
- Sault Tribe (MI) | Classification and Compensation Study
- State of Colorado | Organizational Review; Training
- Tampa Bay Partnership (FL) | Organizational Review
- Tampa Bay Water (FL) | Compensation and Classification Study
- Texas Southmost College | Market Surveys and Evaluations
- University of Arkansas for Medical Sciences | Compensation Study
- University of Nevada, Las Vegas | Strategic Planning

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LAMONT BROWNE, Ed.D.

Vice President
MGT CONSULTING GROUP



Dr. Browne is a strong diversity, education, business, and talent leader, and is a change agent focusing on equity, inclusivity, and quality. He excels in utilizing a data-driven analytical approach and high EQ (emotional quotient) to develop high functioning teams who work collaboratively to design and implement strategic systems that enhance organizational performance. Dr. Brown partners with executive leadership teams and other professionals to collaboratively set and achieve benchmark goals to improve organizational strategy, efficiency, and impact. He prioritizes strong organizational culture, promotes diversity and inclusivity, and invests in the development of each client’s talent force to drive the organization’s success. This is done by understanding motivations, experiences, desires, hopes, and fears and use that to design a road-map, create a development plan, and align resources to support the organization’s growth. He is nationally recognized as an award-winning leader for leadership development, being performance driven, and achieving results that improve organizations and advance marginalized peoples and communities.

In 2011, Dr. Browne became executive director of a struggling charter school in Delaware—EastSide Charter School—and later took leadership of Family Foundations Academy. In 2015, he began leading Delaware’s first multi-charter partnership. In three years, the school’s academic proficiency increased 30 percent in reading and 26 percent in math, the highest growth of any charter school in the state. In 2016, Dr. Browne overtook a bold reform as the executive director of autonomous schools for Aurora Public Schools (CO). In this position, Dr. Browne led the Action Zone—the district’s first cohort of state-approved innovation schools. He also oversaw all of the district’s authorized charter schools. He became an active leader advocating for collaboration, community development, and educational reform. He participates in various educational and civic groups with the goal of ensuring academic and social access and equity for all students.

Currently Dr. Browne serves as the project manager on MGT’s project for Aurora Public Schools to provide school turnaround services of North Middle School. He is overseeing MGT’s role as acting superintendent to have full authority over the following: personnel/staffing, professional development and training, instructional program oversight, managing professional services, school climate and culture, budgetary management, policy evaluation, academic leadership, and operational excellence.

AREAS OF EXPERTISE

- ◆ Entrepreneurial Leadership
- ◆ Business Strategy
- ◆ Leadership Development
- ◆ Turnaround Leadership
- ◆ Organizational Culture
- ◆ Building Diverse / Inclusive Teams
- ◆ Community Engagement
- ◆ Strategy Development
- ◆ Partnerships / Fundraising
- ◆ Executive Communication
- ◆ People / Career Development
- ◆ Cross-functional Collaboration

EDUCATION

Master of Business Administration, University of Colorado
 Doctor of Education: Leadership, Administration, and Policy, University of Delaware
 Master of Education: Curriculum and Instruction, University of Delaware
 Bachelor of Science in Business Administration: Finance, University of Delaware

AWARDS, ACTIVITIES, & ACCOMPLISHMENTS

Ryan Award, presented by the Accelerate Institute for “Exceptional leadership in closing the achievement gap in urban K12 schools”
 Order of Excellence, presented by the Delaware State BOE for “Outstanding contributions toward the growth and betterment of the students served through Delaware Public Education”



LAMONT BROWNE, Ed.D.

Vice President

MGT CONSULTING GROUP

Merit Award, presented by the Delaware Secretary of Education for “Making a distinctive contribution to the educational program of Delaware”

Impact Award, presented by the Delaware Charter Schools Network for “Being a visionary for significant educational improvements who inspires others while utilizing innovative or creative approaches while addressing a compelling student need”

PROFESSIONAL BACKGROUND

MGT Consulting Group, September 2019-Present *Vice President, Education Transformation*

University of Colorado - Denver, CO, 2019-Present *Adjunct Professor, Executive MBA Program*

Browne Consulting, 2013-Present *Independent Leadership Consultant, Chief Portfolio Officer*

Serve as executive coach to school leaders and as a consultant to small, medium, and large school districts, charter schools, foundations, higher education institutions, state departments of education, and community non-profits.

Aurora Public Schools - Aurora, CO, 2016-2018 *Executive Director, Office of Autonomous Schools*

Served as the Chief of the Charter School Office (5,000 students; nine schools), Chief of Innovation Schools (4,000 students; five schools with 350 staff members; 13 direct reports), and managed the district’s school turnaround framework.

Vision Academy Charter Schools - Wilmington, DE, 2011-2016 *Chief Executive Officer*

Founded and led Delaware’s only charter management organization with a team of 160 employees serving three schools and two boards of directors. Built a central office team and managed an \$18 million annual budget, overseeing curriculum, instruction, assessment, data analysis, and teacher and leader coaching models.

Head of School, EastSide Charter School

Led school turnaround of Delaware’s first elementary charter school as instructional and business leader. Pioneered and led the State’s first alternative teacher evaluation system; later adopted by 14 schools and two school districts.



VERNETTA MITCHELL

Senior Consultant
MGT CONSULTING GROUP



Ms. Mitchell is an expert in minority business program development and has developed and managed small, minority, and women business programs for local government entities and private sector companies for over 22 years.

- ✓ **Held the position of MWBE Program Director for the City of Charlotte, where she redesigned the City’s certification, outreach, and goal-setting processes.**

Ms. Mitchell has participated on more than 30 disparity studies as a team leader or project director. She has extensive experience in project management, project scheduling, analytical reporting, facilitation, and public relations. Ms. Mitchell’s experience in construction procurement, goods and services procurement, and program administration is critical asset in qualitative data collection, interpretation of procurement policies and procedures, and program expansion or improvement recommendations.

AREAS OF EXPERTISE

- ◆ Project Management and Subcontractor Management.
- ◆ Construction procurement and general purchasing processes.
- ◆ Project scheduling.
- ◆ Qualitative research and data collection.
- ◆ Community and Business Outreach.

EDUCATION

B.S., Business Administration, Strayer University, 2005
Minority Business Executive Program (Tuck School of Business)

PROFESSIONAL AFFILIATIONS

North Carolina M/WBE Coordinators’ Network – Past President
Southeast Evaluation Association

SAMPLE OF RELEVANT PROJECT EXPERIENCE

- **City of Fort Lauderdale (FL) | Disparity Study**
- **City of Miramar (FL) | Disparity Study**
- **City of Pensacola (FL) | Disparity Study; M/WBE Program Implementation; Review of Small Business Enterprise Program**
- **Hillsborough County Aviation Authority (FL) | Disparity Study Update**
- **Osceola County (FL) | Disparity Study**
- **School Board of Miami-Dade County (FL) | Comprehensive Disparity Study**
- **Tallahassee Consortium [City, County, Blueprint Agency] (FL) | M/W/SBE Disparity Study**
- City of Charlotte (NC) | Disparity Study
- City of Charlottesville (VA) | Disproportionate Minority Study
- City of Dallas (TX) | Availability and Disparity Study
- City of Dayton (OH) | Third Generation Disparity Study; Second Generation Disparity Study; Policy Implementation Assistance
- City and County of Denver (CO) | M/W/DBE Disparity Study and Registered Apprenticeship Study
- City of Greensboro (NC) | Disparity Study
- City of Hampton and Schools (VA) | Disparity Study
- City of Jersey City (NJ) | Disparity Study
- City of New York (NY) | MWBE Disparity Study; Local Hiring Analysis
- City of Portsmouth (VA) | Procurement Disparity Study; MWBE Program Implementation
- City of Tulsa (OK) | Business Disparity Study, Phase I & II; Program Implementation Assistance
- City of Winston-Salem (NC) | Disparity Study
- Dane County (WI) | Review of Racial and Social Equity
- Government of the District of Columbia (DC) | Capability and Capacity Analysis
- Prince George's County (MD) | Utilization and Availability Study



LARA HOLIMON OPHEIM

Senior Consultant
MGT CONSULTING GROUP



Ms. Opheim has over 11 years of experience working with data systems and analytical methods and techniques and is a key member of the disparity data collection and analysis team. In the past four years Ms. Opheim has worked on eight disparity studies collecting and analyzing both quantitative and qualitative data. Her experience translating data analysis results to inform decision making about disparity findings and conclusions is critical throughout this project. Ms. Opheim will provide survey design and implementation via Qualtrics, data modeling, and data analysis.

AREAS OF EXPERTISE

- ◆ Data analysis
- ◆ Data collection and preparation
- ◆ Research and evaluation
- ◆ Technical skills in Excel, MS SQL, PostgreSQL, PowerBI, Word, GIS, Python, Adobe

EDUCATION

M.A. Urban and Regional Planning, University of Florida, 2012
B.A., Geography and Sociology, University of Florida, 2010

AWARDS

Awarded the 2012 WRS Infrastructure & Environment, Inc. Award in Memoriam of Mario Ripol

DISPARITY AND DIVERSITY PROJECT EXPERIENCE

- Alaska Department of Transportation & Public Facilities | DBE Disparity Study
- City of Charlottesville (VA) | Disproportionate Minority Study
- City of Dallas (TX) | Availability and Disparity Study
- City of Dayton (OH) | Third Generation Disparity Study
- **City of Fort Lauderdale (FL) | Disparity Study**
- City of New York City (NY) | MWBE Disparity Study; Local Hiring Study
- City of Winston-Salem (NC) | Disparity Study
- Government of the District of Columbia | Capability and Capacity Analysis
- Johnson County Community College (KS) | Diversity Equity Inclusion Study
- North Texas Tollway Authority | Disparity Study
- Osceola County (FL) | Disparity Study
- Prince George's County and Community College (MD) | Availability and Utilization Studies
- Sacramento Municipal Utility District (CA) | Availability Study
- **Tallahassee Consortium [City, County, Blueprint Agency] (FL) | M/W/SBE Disparity Study**

ADDITIONAL PROJECT EXPERIENCE

- Aurora Public Schools (CO) | Performance/Efficiency Review
- Edina Public Schools (MN) | Strategic Planning
- Ferguson-Florissant School District (MO) | Facilities Master Plan
- Guilford County Schools (NC) | Facility Optimization Plan
- Hickman Mills School District (MO) | Facilities Master Plan
- Housing Authority of Savannah (GA) | Strategic Plan
- Indiana Department of Administration | Gary School Corporation Emergency Management Services
- Lindbergh Schools (MO) | Strategic Planning
- Lyon County School District (NV) | Benchmark Studies
- Metro Nashville Public Schools (TN) | Enrollment Projections
- Oregon Health Insurance Marketplace | Demographics Study
- Pasco School District (WA) | Facility Master Plan Facilitation - Phase II



WILLIAM FIORITO

Statistical Analyst
MGT CONSULTING GROUP



Mr. Fiorito is a disparity study research analyst with superior research and analytical skills. In recent years he has provided research and analysis on a dozen disparity studies. In addition to disparity study research and analysis, he has experience performing human resources studies, survey design and implementation, as well as market research. His primary responsibilities include collecting, compiling, and analyzing massive and complex information and data for projects, and assisting with the developing findings and recommendations as well as writing and editing reports.

EDUCATION

M.B.A., Florida State University
B.A., Philosophy, Minor in English, Florida State University

PROFESSIONAL AFFILIATIONS

Florida State University MBAA
Florida State University Cob Alumni Association
NYP, Tallahassee

DISPARITY PROJECT EXPERIENCE

- Alaska Department of Transportation & Public Facilities | DBE Disparity Study
- City of Dallas (TX) | Availability and Disparity Study
- City of Dayton (OH) | Third Generation Disparity Study
- **City of Miramar (FL) | Pre-Disparity and Disparity Study**
- City of New York (NY) | MWBE Program Availability Analysis; Local Hiring Analysis
- City of Winston-Salem (NC) | Disparity Study
- Dane County (WI) | Review of Racial and Social Equity
- Government of the District of Columbia | Capability and Capacity Analysis
- North Texas Tollway Authority | Availability and Disparity Study
- **Osceola County (FL) | Disparity Study**
- Prince George's County (MD) | Availability and Utilization Studies
- Shelby County Board of Education (TN) | Business Market Availability and Disparity Study
- **Tallahassee Consortium [City, County, Blueprint Agency] (FL) | M/W/SBE Disparity Study**
- Washington Suburban Sanitary Commission (MD) | Disparity Study

ADDITIONAL PROJECT EXPERIENCE

- Bedford County (VA) | Pay and Classification Study
- Brevard County School Board (FL) | Districtwide Compensation Study
- Centre Area Transportation Authority (PA) | Classification and Compensation Study
- City of Apopka (FL) | Classification and Compensation Study
- City of Kingsport (TN) | Classification and Pay Study
- Florida Development Disabilities Council | Classification and Compensation Study
- Florida Lottery | Classification and Compensation Study
- Florida Office of The Attorney General | Salary and Compensation study
- Galveston County (TX) | Sheriff's Office Compensation Review
- Gogebic County (MI) | Classification and Compensation Study
- Gulf Coast State College (FL) | Compensation and Classification Study
- Hawaii Health Systems Corporation | Compensation and Classification Study
- Hillsborough Community College (FL) | Administrator Classification and Compensation Study
- Iowa Valley Community College District I Classification and Pay Study
- Lancaster County (PA) | Total Compensation Study
- Navajo Nation | Compensation Study
- North Carolina Education Lottery | Compensation and Classification Study
- Oregon Institute of Technology | Faculty Compensation Study
- Pittsburgh Public Schools (PA) | Classification and Compensation Study
- Santa Fe College (FL) | Classification and Compensation Study
- South Carolina Education Lottery | Classification and Compensation Plan
- Tampa Bay Water (FL) | Compensation and Classification Study
- Texas Southmost College | Salary Compensation Study
- York County (SC) | Compensation Study



KELSEY E. MILLER

Analyst
MGT CONSULTING GROUP



Ms. Miller brings strong data analysis, administrative, and research skills to a wide range of projects, with a focus in Disparity/DEI, Human Capital, and Education projects. Her education and experience in International Relations has benefited strategic corporate initiatives to reach international clients. Prior to MGT, she worked in a number of international and local non-profits and political organizations.

EDUCATION

- M.A. with honors, International Relations, Central European University, Budapest, Hungary
- B.A., Political Science and International Studies, Certificate in European Studies, University of Wisconsin-Madison

SKILLS

- ◆ Qualitative and quantitative research
- ◆ Data visualization
- ◆ Focus groups
- ◆ Written and verbal communication
- ◆ Job descriptions (FL)SA determinations, and salary benchmarks

RELEVANT PROJECT EXPERIENCE

Disparity Studies

- Alaska Department of Transportation & Public Facilities | DBE Disparity Study
- City of Dallas (TX) | Availability and Disparity Study
- City of New York (NY) | MWBE Disparity Study
- North Texas Tollway Authority | Disparity Study

Human Capital Studies

- Brevard County Public Schools (FL) | Compensation Study
- City of Apopka (FL) | Classification and Compensation Study
- County of Glades (FL) | Employee Policy and Handbook Development
- Hawaii Health Systems Corporation | Compensation and Classification Study
- Hillsborough Community College (FL) | Administrator Classification and Compensation Study
- Navajo Nation | Compensation Study
- Pittsburgh Public Schools (PA) | Classification and Compensation Study
- Santa Fe College (FL) | Classification and Compensation Study
- Tampa Bay Water (FL) | Compensation and Classification Study
- York County Government (SC) | Position Evaluation FLSA, and Job Description

Strategic Planning

- Edina Public Schools, MN | Strategic Planning
- Michigan State University | Residential and Hospitality Services Strategic Planning

Higher Education Market/Housing Studies

- American Campus Communities for UCB | Market Study
- Central Community College (NE) | Market Study
- Daytona State College (FL) | Student Housing Market Study
- Delaware State University | Due Diligence
- Henderson State University (AR) | Student Housing Studies
- Longwood University Real Estate Foundation (VA) | Market Due Diligence
- Louisiana State University Health Sciences Center – New Orleans | Student Housing Studies
- Montgomery College (MD) | Student Housing Study
- Portland Public Schools (OR) | Facilities Master Planning
- Texas A&M University | Off-Campus Market Analysis
- University of California Berkeley | Student and Faculty-Staff Housing Study
- University of California Riverside | Due Diligence
- University System of Georgia | South Georgia Needs Assessment

Other

- Florida Office of Program Policy and Government Accountability | Performance Audits: Broward/Collier/Okaloosa/St. Lucie Counties and Alachua/Washington County School Districts
- Indiana Department of Administration | Emergency Manager for Gary Community School Corporation
- Maricopa County (AZ) | Rate Methodologies and Recommendations



ANNELIESE OPPENHEIM

President

OPPENHEIM RESEARCH, INC.



Ms. Oppenheim founded Oppenheim Research in 1989 after amassing 15 years of experience in the field of survey analysis and opinion research. She is a long term partner with MGT and has provided survey research for well over a dozen disparity studies. Her work has included public opinion polling, policy study, program evaluation, and product and advertising research. She was formerly a research associate and director of field operations for the Policy Sciences Program of Florida State University in Tallahassee. Since joining the Policy Sciences Program in 1978, she was responsible for operating the Program's Survey Research Center, managing all survey fieldwork, proposal development, assisting faculty in survey research, data collection, using survey information, and preparing survey reports. She also trained and supervised interviewing staff and graduate assistants, developed the computer system for storage and retrieval of information derived from surveys, and coordinated and designed the physical plant for the Survey Research Center. Her other duties included writing training manuals for supervisors and interviewers.

Ms. Oppenheim was editorial assistant for the publication "Florida Public Opinion" from 1985-1989, and has authored and co-authored several manuals and survey reports including The Florida Annual Policy Survey (1979-1988) and a partially annotated bibliography, "Survey Research" (November 1985). In 1980, she served as consultant to The University of Alabama at Tuscaloosa and Florida International University to set up state-of-the-art survey research facilities at those two institutions.

Prior to her work with FSU's Policy Sciences Program, Ms. Oppenheim served Florida State University's Communication Research Center as assistant project director, research assistant, and administrative assistant, respectively. In these positions she performed many duties, including coordinating studies for the Corporation for Public Broadcasting in Washington, D.C.

EDUCATION

Master's and Bachelor's, Education (Concentration in Statistics, Research Design and Analysis), Florida State University

DISPARITY STUDY EXPERIENCE WITH MGT

- City of Dayton, OH | Third Generation Disparity Study
- **City of Miramar, FL | Disparity Study**
- City of New York, NY | MWBE Program Availability Analysis
- **City of Pensacola, FL | Disparity Study**
- City of Portsmouth, VA | Procurement Disparity Study
- **City of Tallahassee, FL | M/W/SBE Disparity Study**
- City of Tulsa, OK | Business Disparity Study, Phase II
- Guilford County Schools (NC) | Disparity Study
- **Hillsborough County Aviation Authority, FL | Disparity Study Update**
- John Wayne Airport, County of Orange, CA | Disadvantaged Business Enterprise Disparity Study
- Portsmouth Public Schools, VA | Procurement Disparity Study
- North Texas Tollway Authority | Availability and Disparity Study
- Shelby County Board of Education, TN | Business Market Availability and Disparity Study



State of Florida

Woman Business Certification

Oppenheim Research Inc.

Is certified under the provisions of
287 and 295.187, Florida Statutes, for a period from:

02/13/2019 to 02/13/2021

Donna Williams, Executive Director
Office of Supplier Diversity



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DR. ADRIENE B. WRIGHT

President
ABELITA LLC

Dr. Adriene B. Wright is president of Abelita. Before launching Abelita, Dr. Wright served as Vice President of Institutional Advancement at Florida Memorial University in Miami Gardens, Florida from 2011-2014, and was Director of Development at Florida A&M University from 2008-2011 where she established a new benchmark in the Tom Joyner School of the Month campaign: the only participating school to exceed the \$1M mark. She also provided budget oversight for multiple grant-funded projects within the FAMU Transportation Center.



Prior to joining FAMU, Dr. Wright co-led the establishment of the Electricity Innovation Institute, a nonprofit subsidiary of the Electric Power Research Institute (EPRI) Washington, DC, established to advance long-term strategic research within the energy sector. She served as its General Manager and Director of Marketing and Development. Dr. Wright represented EPRI, working jointly with the Sloan Foundation to select a host site and co-fund the establishment of the only U.S. university-based Electricity Industry Center now housed at Carnegie Mellon University.

Dr. Wright has extensive experience working with community organizations/ stakeholders to address issues related to jobs and business growth including her service on the Greater Miami Chamber of Commerce, Good to Great Committee – evaluated businesses in the South Florida Community, including on-site interviews, comprehensive evaluations and assessments to be recognized for growth, workforce development, and contributions to the community.

Dr. Wright is a former Brookings Congressional Fellow, having served in the office of Senator William Frist, M.D., where she managed science and technology issues and was instrumental in advancing legislative initiatives for the NASA International Space Station, R&D Funding for NIH, and served a liaison to the White House for Y2K.

Dr. Wright earned her Ph.D. in Theology from Covenant Bible College and Theological Seminary, her Master's in Theology from Trinity Theological Seminary and College of the Bible, and her Bachelor's in Civil Engineering from Florida A&M University.



State of Florida

Woman & Minority Business Certification

Abelita LLC

Is certified under the provisions of
287 and 295.187, Florida Statutes, for a period from:

01/09/2019 to 01/09/2021

Erin Rock, Secretary
Florida Department of Management Services



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FIRM EXPERIENCE

Because MGT also is a full service management consulting and research firm, we bring a certain breadth and depth of experience providing consulting and research services for local governments and government-related entities that you will not find among our competitors that only conduct disparity studies. Our ability to conduct high quality disparity studies is significantly enhanced by our experience and understanding of local government operations, processes, and systems across different departments and functions and the regulatory and legal environment in which they operate.

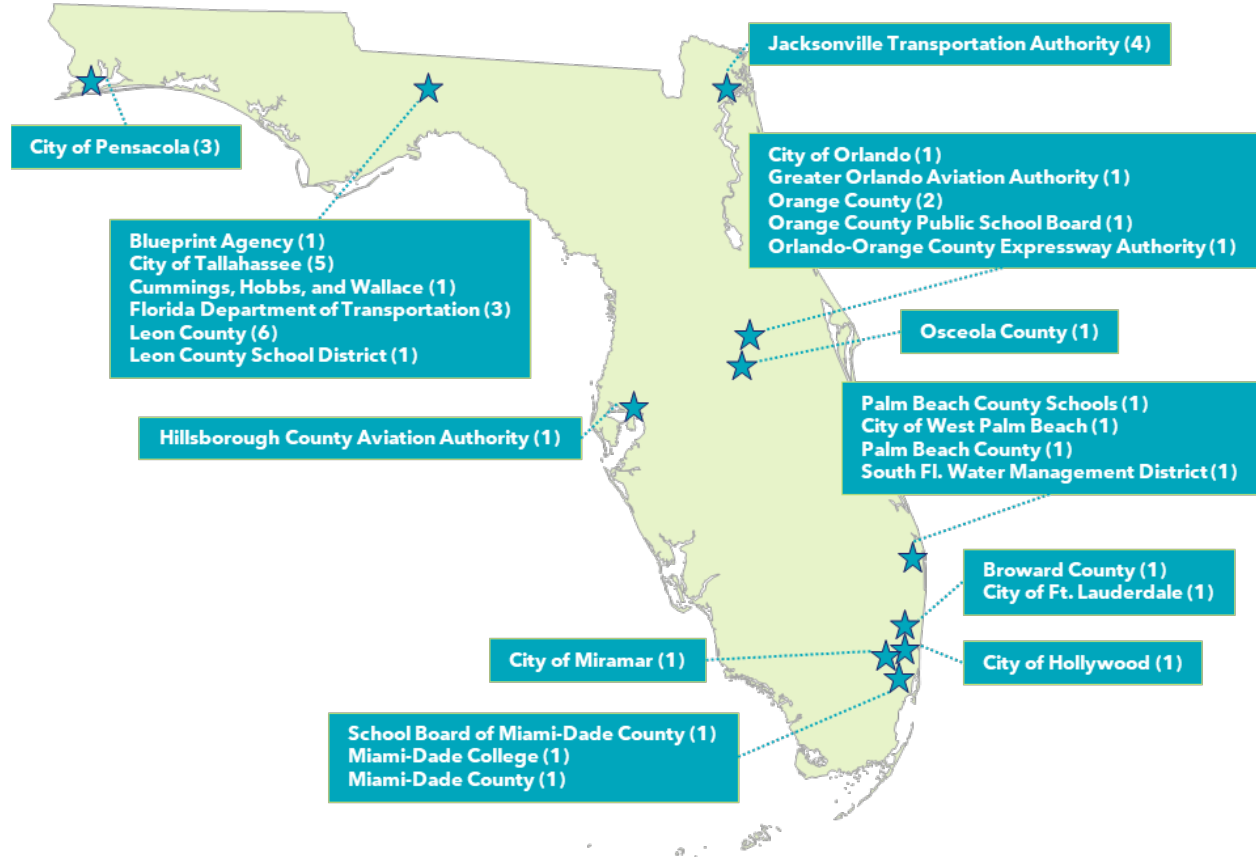
MGT has completed two of the largest disparity studies in the country:

- ◆ **City of New York Disparity Study:** The study included purchases from July 1, 2006-June 30, 2015 totaling \$87,269,054,086 of procurement and contracting which is the largest procurement contract volume analyzed in any disparity study.
- ◆ **State of Texas Historically Underutilized Business Disparity Study of State Contracting:** The study included purchases from September 1, 2005-August 31, 2008 totaling \$11,108,291,320 of procurement including 210 agencies and institutions of higher education. The study's finding and recommendations were adopted by the State.



Exhibit 10 illustrates disparity projects MGT has conducted for Florida clients.

Exhibit 10. Florida Disparity Study Projects



A *sample* of projects most relevant to the City’s disparity study is provided. A comprehensive list of MGT disparity and disparity-related (M/WBE program implementation, litigation, etc.) studies follows.

RELEVANT FLORIDA DISPARITY STUDIES

[City of Fort Lauderdale | Disparity Study](#)

MGT was contracted by the City to conduct a Disparity Study. The objective of the study was to determine if there is a factual predicate to establish a MWBE program. The study included the following: a policy, procedures, and program review, a market area and utilization analysis, an availability and disparity analysis, anecdotal information gathering, recommendations, and a draft and final report.

[City of Hollywood | Availability Study](#)

MGT conducted an availability study of minority- and woman-owned businesses in four market areas, including Broward County, the State of Florida, a Tri-County Area including Dade, Broward, and Palm Beach counties, and businesses nationwide. MGT developed a computerized database of 5,603 minority- and woman-owned businesses. As part of the database development, MGT surveyed 1,800 construction and professional services firms to collect bonding and insurance data.

City of Pensacola | *Disparity Study; Review of Small Business Enterprise Program; M/WBE Program Implementation*

MGT was retained by the City to conduct a comprehensive disparity study. The study determined the availability and utilization M/WBEs in City contracts and included an update review of policies and procedures and legal review; data assessment and collection; utilization and availability analyses; disparity analysis; anecdotal information gathering and analysis; private sector analysis; surveys of business owners; regression analysis; findings and recommendations; and draft and final reports. Upon completion of the study, MGT was retained by the City to assist with the development and implementation of a M/WBE program. The project included a review of relevant programs, the development of program requirements, and the implementation of new policies and procedures. Prior to conducting the disparity study, MGT reviewed the City's Small Business Enterprise (SBE) program. The review included the City's current SBE program; developing recommendations for race- and gender-neutral program modifications; complete with a detailed implementation plan; and program and data collection improvements.

City of Tallahassee | *Disparity Study, Phase I & II*

MGT conducted a second-generation disparity study for the City of Tallahassee. Phase I of the study addressed the issues of utilization and availability. Following collection and analyses of these databases, the team prepared index charts to determine specific areas of concern. This finding was presented to the City Commission to establish parameters for Phase II, which addressed anecdotal evidence, policy and procedures, and race-neutral issues. Phase II of the study consisted of additional fact finding to determine if discrimination was a factor in the disparity identified in the Phase I study completed by MGT. During Phase II, MGT utilized surveys and interviews to conduct anecdotal research. Phase II analysis included multivariate analysis and policy and procedures review. MGT made recommendations for future program practices and operation and narrowly tailored remedies.

Minority Disparity Study

In response to the U.S. Supreme Court decision in *City of Richmond v. Croson*, the City of Tallahassee engaged MGT to conduct an analysis of the City's contracting and procurement. **This study was one of the first disparity studies conducted in Florida.** MGT was to determine if disparity existed in the number of contracts and purchases awarded to minority or disadvantaged firms. The *Richmond* case required minority set-aside programs to be based on disparity proven through a statistical analysis of historical purchasing results.

Hillsborough County Aviation Authority | *Disparity Study Update*

MGT conducted a disparity study update for the Hillsborough County Aviation Authority. This study included a policy, programs, and procedures review of their DBE and W/MBE programs, a legal review, data evaluation and collection, market area, utilization, and availability analysis, disparity analysis, private sector analysis, anecdotal evidence gathering, recommendations, a draft and final report.

School Board of Miami-Dade County | *Comprehensive Disparity Study*

MGT was retained by the School Board of Miami-Dade County to conduct a comprehensive disparity study. This study had two phases. The first phase concentrated on the business categories of construction, construction-related services, and professional services. The second phase focused on the business categories of other services, goods, and supplies. The study included a legal analysis, a policy and procedures analysis, a utilization, availability and disparity analysis, anecdotal information

gathering, a private sector analysis, a business owner survey, a regression analysis, recommendations, and draft and final reports.

City of West Palm Beach | *Minority Disparity Study*

MGT conducted a fact-finding study documenting actual contracting and procurement with minority- and women-owned businesses over the recent past. MGT determined the extent disparity existed in the letting of contracts and purchases for various types of services by minority categories within the City's relevant market area. The study was in response to the U.S. Supreme Court decision in *Croson v. Richmond*. The resulting documentation, analysis and review helped to determine the amount, if any, disparity, the possible causes, and potential program solutions.

Orange County | *Disparity Study*

MGT conducted program assessment and data analyses of the implementation of Orange County M/WBE Ordinances 94-02, 98-25, and 02-01. Fiscal years 2000 through 2004 were included in the analyses, and MGT analyzed M/WBE and non-M/WBE activities in the business categories of construction, professional services, and goods/commodities and services. The M/WBE program assessment used 16 tasks that were grouped into background research, evaluation of M/WBE goals, and evaluation of impediments to M/WBE utilization.

Leon County | *Anecdotal, Legal, and Programmatic Review Disparity Study*

MGT performed an anecdotal, legal, and programmatic review for Leon County as a follow-on to the 2003 factual predicate study, also conducted by MGT. The anecdotal, legal, and programmatic review included the collection and review of anecdotal evidence, legal analysis of prevailing case law, and recommendations to implement narrowly tailored steps to remedy any active or passive discrimination. The results of this study were incorporated with the Factual Predicate Study to demonstrate the presence of a compelling interest for a remedial procurement program and to provide recommendations as to how the program should be narrowly tailored to level the playing field for minority- and woman-owned business enterprises.

Disparity Study Update, Phase I

MGT updated Leon County's 1994 minority/women business enterprise disparity fact finding study conducted by MGT. The update focused on the changes that had occurred in the marketplace and levels of M/WBE participation in County procurements since the 1994 study. This study was the first part of a two-phase study, which included analyses of the utilization of M/WBEs in county procurements relative to the availability of those firms in the County's market area. MGT's technical approach to conduct this study included: 1) determining the number of contracts, subcontracts, and purchase order expenditures awarded to M/WBEs and non-M/WBEs in order to establish the relevant market area by procurement category; 2) analyzing available utilization data to determine the relative distribution of awards by business category to M/WBEs and non-M/WBEs; 3) determining the pool of available contractors, subcontractors, and vendors that could have provided goods and services to the county; 4) conducting a survey of a statistically reliable sample of contractors, subcontractors, and vendors to gather business information and other information that would be helpful in evaluating the County's current M/WBE program; and 5) comparing the utilization and availability data to determine the absence or presence of disparity.

D) QUALIFICATIONS



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[Broward County | Disparity Study](#)

MGT conducted a second-generation disparity study for Broward County government. The study included analysis of statistical data, anecdotal data, and purchasing policies to determine if a need existed for the County's S/MBE program. The study determined if the program needed modifications to narrowly tailor the remedies. MGT provided monthly progress reports to keep the client abreast of each task and subtask performed and to ensure clear, direct communication with the client. The comprehensive final report included alternative solutions and recommendations for the County to consider for modifying its current Small Disadvantaged Business Enterprise (SDBE) programs to ensure constitutionality and effectiveness. MGT also developed methods for the County to monitor variations in availability and utilization of SDBEs over time.

ADDITIONAL RELEVANT DISPARITY STUDIES

[City of Charlotte \(NC\) | Disparity Study](#)

MGT conducted an update to the City of Charlotte's 2004 disparity study. This update study included the following: legal review, data assessment and collection, market area, utilization, availability and disparity analyses, private sector analysis, anecdotal information gathering and analyses, survey of vendors, regression analysis, best practices, recommendations, draft and final reports.

[City of Columbia \(SC\) | Analysis of Business Underutilization Causation](#)

MGT conducted an analysis of business underutilization causation for the City of Columbia. This project encompassed a complete and standard disparity analysis. MGT examined whether there was significant evidence of past or present discrimination in public contracting against racial and ethnic minorities or women in the city's local market. The analysis included contracting for goods and services, construction services (including subcontracting), and professional services for a three-year period. Five work elements were performed during the study: availability, utilization, anecdotal evidence summary, quantitative causation analysis, and remedies. The methodology employed was consistent with a second-generation disparity study.

[City of Dallas \(TX\) | Availability and Disparity Study](#)

MGT conducted a comprehensive, effective, and legally supportable availability and disparity study that analyzed contracting opportunities for M/WBE firms in the City of Dallas. Phase I analyzed utilization and availability of M/WBEs; provided a detailed review and analysis of procurement practices, policies, practices and procedures, benchmark comparison of M/WBE programs in other cities in Texas; and provided recommendations on how to proceed to Phase II of the Disparity Study. Phase I included one of the most massive community engagement processes MGT has executed to obtain input from the minority business community. In addition to stakeholder interviews, focus groups, and public hearings, MGT launched a disparity study website that enabled businesses to provide input and a telethon like event that attracted over 400 callers. Phase II included a legal review and analysis of case law that guided and governed the disparity study methodology; established a relevant geographic market area analysis; collected anecdotal evidence of discrimination, credit market access analysis, workforce study; and calculated disparity. At the conclusion of the study, MGT presented a complete and comprehensive final report with an executive summary outlining the methodology, findings, and recommendations.



City of Dayton (OH) | Second Generation Disparity Study

MGT performed a second generation disparity study for the City of Dayton in accordance with federally mandated laws. MGT assisted the City with implementing a minority- and female-owned business enterprise (M/FBE) program with aspirational goals for the business categories of construction prime contractors (20%); services (15%); and supplies (8%).

City and County of Denver (CO) | M/W/DBE Disparity Study and Registered Apprenticeship Study

MGT provided two studies for the City and County of Denver: a comprehensive business disparity study and a registered apprenticeship study. The disparity study involved determining, if and to what extent, disparity existed between the utilization of M/W/DBEs and ACDBEs in Denver contracting, procurement, and concessions compared to the availability of firms to perform work. The registered apprenticeship study consisted of fact-finding to analyze apprenticeship trends and practices.

City of Greensboro (NC) | Disparity Study

MGT provided disparity research services to conduct a comprehensive disparity study for the City of Greensboro. The study determined the impact of the City's M/WBE program and whether or not discrimination continued to exist in the market area. The study also detailed the presence of discrimination in the private sector and provided narrowly-tailored recommendations based on study findings.

City of Hampton (VA) | Disparity Study

MGT conducted a disparity study to examine the City of Hampton's utilization of firms on City procurements and compare the percentage of distributions to the availability of firms, by business owner classifications, to perform work. The study included anecdotal data gathering to identify business owner perceptions and opinions as well as regression analysis to identify causal factors for any identified unfair business practices. MGT also conducted a review of current legal precedents with bearing on the study methodology and an analysis of the City's procurement policies and procedures.

City of New York (NY) | MWBE Disparity Study

The New York City disparity study was one of the largest disparity studies that has ever been conducted. A variety of community engagement activities were conducted in all five boroughs and included extensive use of social media and traditional media. The objective of the study was to conduct a disparity analysis of the utilization of M/WBEs in New York City contracting as compared to the availability of M/WBEs in the relevant market. The study included the following components: a legal framework review, policy and procedures review, data evaluation and collection, market area, utilization, and disparity analyses, anecdotal information gathering and analysis, private sector analysis, a telephone survey, regression analysis, recommendations, a draft and final report.

City of Portsmouth (VA) | Procurement Disparity Study

The purpose of the City of Portsmouth's procurement disparity study was to determine if there is disparity between the number of minority- and women-owned business enterprises (M/WBEs) who are ready and capable of providing professional and non-professional services and the number of M/WBEs who are actually performing those type contracts. The study included a legal review; a review of policies, procedures, and programs; data assessment and collection; utilization, availability and disparity analyses; anecdotal analysis; private sector analysis; recommendations; and a draft and final report.

Following completion of the study, MGT provided consultant services related to the development and administration of a Minority and Women-owned Business (M/WBE) Program for the City.

City of San Antonio (TX) | Availability Study

MGT conducted an availability study for the City of San Antonio to estimate the number of vendors available to contract with the City. The analysis was conducted for the business categories of construction, professional and personal services, and purchases. The availability analysis was divided among women and minority classifications.

City of Tulsa (OK) | Business Disparity Study, Phase I & II; Program Implementation Assistance

Phase I of the study included a review of policies, procedures, and programs; collection and assessment of data; a market area analysis; a utilization and threshold analysis, determining the availability of qualified firms; analysis of data for evidence of statistically significant disparities; and a final report. Phase II addressed legal issues and included a private sector analysis, anecdotal information analysis, a review of the effectiveness of race- and gender-neutral remedies, the identification of narrowly tailored race- and gender-neutral, and race- and gender-based remedies, best practices and peer analysis, and recommendations for program improvements. Upon completion of both phases, MGT assisted with the implementation of some recommendations from MGT's business disparity study for the City. The City requested MGT provide feedback related to input, analysis, and examination of documents and supporting statements regarding MBE program implementation.

Exhibit 11 presents a comprehensive list of MGT studies. *The date in parenthesis indicates project completion year.*

Exhibit 11. Comprehensive List of Studies

CITIES	
City of Asheville (NC)	•Disparity Study (1993)
City of Atlanta (GA)	•Disparity Study (2005)
City of Baltimore (MD)	•Disparity Study (current) •Disparity Study (1999)
City of Charlotte (NC)	•Disparity Study (2011)
City of Charlottesville (VA)	•Disproportionate Minority Study (2019)
City of Columbia (SC)	•Analysis of Business Underutilization Causation (2005)
City of Dallas (TX)	•Availability and Disparity Study (2020) •Department of Aviation DBE Plan and Goal Development (2019)
City of Dayton (OH)	•Third Generation Disparity Study (2019) •Policy Implementation Assistance (2009) •Second Generation Disparity Study (2008)
City and County of Denver (CO)	•M/W/DBE Disparity Study and Registered Apprenticeship Study (2013) •Economic Study (2002)
City of Fort Lauderdale (FL)	• Disparity Study (2019)
City of Fort Worth (TX)	•Disparity Data Assessment (2003)
City of Greensboro (NC)	•Disparity Study (2011)
City of Hampton (VA)	•Disparity Study (2005)
City of Hampton and Schools (VA)	•Disparity Study (2014)
City of Hollywood (FL)	• Availability Study (1997)

City of Jersey City (NJ)	•Disparity Study (2008)
City of Miramar (FL)	• Disparity Study (2018)
City of New York (NY)	•Local Hiring Analysis (2019) •MWBE Disparity Study (2018)
City of Pensacola (FL)	• M/WBE Program Implementation (2013) • Disparity Study (2012) • Review of SBE Program (2009)
City of Phoenix (AZ)	•Disparity Study (1999) •Disparity Study and Update (2004)
City of Phoenix [Gallagher & Kennedy, Attorneys] (AZ)	•Disparity Study Revisions (1994)
City of Portsmouth (VA)	•MWBE Program Implementation (2016) •Procurement Disparity Study (2014)
City of Raleigh (NC)	•Disparity Study (1994)
City of Sacramento (CA)	•DBE Goal-Setting Study (2000)
City of San Antonio (TX)	•Availability Study (1997)
City of Tallahassee (FL)	• Disparity Study, Phase II (2004) • Disparity Study, Phase I (2001) • Minority Disparity Study (1990)
City of Tulsa (OK)	•M/WBE Program - Technical Assistance (2014) •Program Implementation Assistance (2012) •Business Disparity Study, Phase II (2010) •Business Disparity Study, Phase I (2008)
City of West Palm Beach (FL)	• Minority Disparity Study (1990)
City of Winston-Salem (NC)	•Disparity Study (2019)
Government of the District of Columbia	•Capability and Capacity Analysis (2019)
New York City Economic Development Corporation (NY)	•Availability and Disparity Update (2005)
COUNTIES	
Broward County (FL)	• Disparity Study (2000)
Charleston County (SC)	•Disparity Study (2006)
Dane County (WI)	•Review of Racial and Social Equity (2017)
DeKalb County (GA)	•Documentation and Administrative Regulation Review (2005) •MBE Implementation Plan (2000) •Disparity Study (1998)
Gloucester County (VA)	•School Cultural Diversity Assessment (2002)
Leon County (FL)	• Disparity Study Update (2009) • Anecdotal, Legal, and Programmatic Review Disparity Study (2004) • Disparity Study Update, Phase I (2002) • Purchasing Review (2000)
Los Angeles County Department of Public Works (CA)	•Local Worker Hiring Study (2011) •Factual Predicate Study (2010)
Miami-Dade County (FL)	• Predisparity Study Planning Initiative (2003)
Nassau County (NY)	•Disparity Study, Phase I (2004) •Disparity Study, Phase II (2005)
Orange County (FL)	• Disparity Study (2005)
Osceola County (FL)	• Disparity Study (2018)
Palm Beach County (FL)	• M/WBE Disparity Study (1990)



Prince George's County (MD)	•Availability and Utilization Studies (2020)
CONSORTIUMS	
Albany Consortium (GA)	•Analysis of Procurement Practices (1996) [4 members]
Charlotte Consortium (NC)	•Disparity Study (2003) [3 members]
Chatham Consortium (GA)	•Disparity Study (1995) [3 members]
Colorado Consortium (CO)	•Disparity Study (1997) [3 members]
Dougherty Consortium (GA)	•Disparity Study (2001) [2 members] •Disparity Study (1995) [6 members]
Kansas City Consortium (MO)	•Disparity Study (1993) [3 members] •Disparity Study (1993) [3 members]
Leon Consortium (FL)	• MBE Fact-Finding Disparity Study (1994) [2 members]
Little Rock Consortium (AR)	•Disparity Study (1996) [7 members]
Minnesota Agency Consortium	•Disparity Study (2009) [6 members]
Orange County Consortium (FL)	• Multi-Jurisdictional Disparity Study (2016) [4 members]
Sacramento Regional Consortium (CA)	•Disparity Study (1999) [5 members] •Disparity Study (1992) [4 members]
San Antonio Consortium (TX)	•Disparity Study (2009) [7 members]
St. Louis Area Consortium (MO)	•Disparity Study (2000) [3 members]
St. Paul Consortium (MN)	•Disparity Study (2007) [2 members]
Tallahassee Consortium (FL)	• M/W/SBE Disparity Study (2019) [3 members]
DEPARTMENTS OF TRANSPORTATION	
Alaska Department of Transportation and Public Facilities	•DBE Study - Availability and Disparity (current) •DBE Study - Availability and Disparity (2014)
Arizona Department of Transportation	•Department's FY08 Revised Annual DBE Goals (2010) •Availability Analysis and Disparity Study (2009)
Colorado Department of Transportation	•Disparity Study (2001)
Florida Department of Transportation	• Disparity Study (1998) • Disparity Study (1992)
Maryland Department of Transportation	•Disparity Study (1999)
Nebraska Department of Roads	•DBE Goal-Setting Study (2000)
North Carolina Department of Transportation	•Disparity Study (2003) •Disparity Study (1998)
Oregon Department of Transportation	•Availability Study Update (2013) •DBE Goal Setting Review and Technical Assistance (2013) •Disparity Study Update (2011) •Goal Setting (2008)
South Carolina Department of Transportation	•Disparity Study (1995)
West Virginia Department of Transportation	•Availability and DBE Goal-Setting Study (2006) •EqualWorks® Program (2003) •Data Assessment and Development of DBE Goals (2002) •Capacity Analysis (2002) •Disparity Study (1999)
EDUCATION ENTITIES	
Denver Public Schools (CO)	•Business Diversity Program Review (2017) •School District #1 - Disparity Study (2014)
Guilford County Schools (NC)	•Disparity Study (2015)

D) QUALIFICATIONS



Miami-Dade College (FL)	• Disparity Study (1995)
Newark Public Schools (NJ)	• Public School Disparity Study (2002)
Palm Beach County Schools (FL)	• Disparity Study (1995)
Pittsburgh Public Schools (PA)	• Disparity Study (1996)
Portsmouth Public Schools (VA)	• Provide M/WBE Program Services (2015) • Procurement Disparity Study (2011)
Prince George's Community College (MD)	• Availability and Utilization Studies (2020)
Purdue University (IN)	• Disparity Study Research (2004)
School Board of Miami-Dade County (FL)	• Comprehensive Disparity Study (2014)
Shelby County Board of Education (TN)	• Development and Implementation of WMBE Program (2018) • Business Market Availability and Disparity Study (2017)
SPECIAL AUTHORITIES	
Birmingham-Jefferson County Transit Authority (AL)	• Disparity Study (1992)
Charlotte Housing Authority (NC)	• Disparity Study (2013)
Clark County Department of Aviation (NV)	• Disparity Study, McCarran International Airport (2009)
Dallas/Fort Worth International Airport (TX)	• Technical Assistance for Program Implementation (2003) • Availability and Disparity Study (2000)
Hillsborough County Aviation Authority (FL)	• Disparity Study Update, Tampa International Airport (2014)
Housing Authority of Baltimore City (MD)	• Disparity Study (<i>current</i>)
Illinois Housing Development Authority	• Racial Equity Impact Assessment (<i>current</i>)
Jacksonville Transportation Authority (FL)	• EqualWorks® Hosting and Maintenance (2005) • EqualWorks® and Availability Study (2005) • Availability Study and Technical Assistance (2003) • DBE Consultant Services (2002)
John Wayne Airport, Orange County (CA)	• DBE Disparity Study (2016)
Maryland-National Capital Park and Planning Commission	• EEO/Affirmative Action Study (1996)
Memphis Light, Gas and Water Division (TN)	• Disparity Study and Policy Formation (2012)
Mobile Area Water and Sewer (AL)	• Disparity Analysis Update (2010)
North Texas Tollway Authority	• Availability and Disparity Study (2020) • Disparity and Market Availability Study (2001)
Orlando-Orange County Expressway Authority (FL)	• Disparity Study (2006)
Port Authority of New York and New Jersey (NY)	• Disparity Study (2010) • Disparity Study (2003)
Port of Portland (OR)	• Disparity Study (2009)
Sacramento Municipal Utility District (CA)	• Small Business Availability Study (2020) • Market Analysis Study (2006)
Sacramento Regional Transit District (CA)	• Supplemental Study of M/WBE utilization (1993)
San Antonio Water System (TX)	• M/WBE Program Disparity Study (2014)
South Florida Water Management District	• MBE Availability and Utilization Study (1995)

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D) QUALIFICATIONS



Washington Suburban Sanitary Commission (MD)	<ul style="list-style-type: none"> •Disparity Study (current) •Disparity Study (2016) •Disparity Analysis of Relevant Private Market (2004) •MBE Program Policies and Procedures (2000) •Disparity Study (1998)
STATES	
Commonwealth of Virginia	<ul style="list-style-type: none"> •Disparity Study, Phase II (2011) •Disparity Study, Phase I (2010) •Disparity Study (2003)
North Carolina Department of Administration	<ul style="list-style-type: none"> •Disparity Study, Phase II (2003) •Disparity Study, Phase I (2003) •Disparity Study (1994)
North Carolina Department of Justice	<ul style="list-style-type: none"> •Investigative, Analysis, and Consultation Services (2010)
North Carolina Institute of Minority Economic Development	<ul style="list-style-type: none"> •Survey of M/WBEs (1997)
North Carolina Joint Legislative Commission	<ul style="list-style-type: none"> •M/WBE Participation (1993)
State of Delaware	<ul style="list-style-type: none"> •Disparity Study (2001)
State of New Jersey	<ul style="list-style-type: none"> •Disparity Study and Report for Procurement Contracts (2004)
State of Oregon	<ul style="list-style-type: none"> •Disparity Study (2007)
State of Tennessee	<ul style="list-style-type: none"> •Disparity Study (2008)
State of Texas	<ul style="list-style-type: none"> •HUB Disparity Study of State Contracting (2010)
Virginia Department of Minority Business Enterprise	<ul style="list-style-type: none"> •Program Implementation Assistance and Organizational Review (2013) •Review of Memorandum on MBE Program (2005)
LITIGATION SUPPORT	
City of Baltimore (MD)	<ul style="list-style-type: none"> •Litigation Support (2003)
City of Little Rock (AR)	<ul style="list-style-type: none"> •Litigation Support (1997)
City of Tallahassee (FL)	<ul style="list-style-type: none"> •Litigation Support (2005)
Cummings, Hobbs, and Wallace (FL)	<ul style="list-style-type: none"> •Disparity and Regression Analysis (1999)
Florida Department of Transportation	<ul style="list-style-type: none"> •Preliminary Legal Documents for Expert Witness (1996)
Nebraska Department of Roads	<ul style="list-style-type: none"> •Litigation Support (2000)
North Carolina Department of Justice	<ul style="list-style-type: none"> •Litigation Support (2007)
North Carolina Department of Transportation	<ul style="list-style-type: none"> •Litigation Support (2005)
Sacramento County (CA)	<ul style="list-style-type: none"> •Litigation Support (1994)

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REQUIRED DOCUMENTS

Included in this section are the following required documents:

- ◆ RFP Cover Page
- ◆ Drug-Free Workplace Form
- ◆ Bidder Verification Form
- ◆ Reference Form
- ◆ Certification of Compliance with Living Wage, if applicable to bidder
- ◆ W-9
- ◆ Applicable licenses and/or certification required by City/County/State
- ◆ Exceptions to the RFP: *MGT takes no exceptions to the RFP.*
- ◆ Tabulation of Subcontractors and Material Suppliers
- ◆ Proposed Subcontractors Form
- ◆ Subcontractor Information Form
- ◆ MGT Financial Statement

BID COVER PAGE



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Procurement Division
200 E University Avenue, Rm 339
Gainesville, FL 32601

(352) 334-5021(main)

Issue Date: December 3, 2020

REQUEST FOR PROPOSAL: # EODX-210013-DM
City Of Gainesville Disparity Study

PRE-PROPOSAL MEETING: [] Non-Mandatory [] Mandatory [x] N/A [] Includes Site Visit
DATE: TIME:
LOCATION:

QUESTION SUBMITTAL DUE DATE: December 28, 2020 at 5:00 p.m.

DUE DATE FOR UPLOADING PROPOSAL: January 4, 2021 3:00PM

SUMMARY OF SCOPE OF WORK:

The City of Gainesville, Florida seeks to ensure equity in its procurement. The City now operates a small business program that includes outreach, training, direct solicitation of bids and price preferences for certified small businesses. The City seeks a disparity study to assess whether there are disparities between the utilization of minority- and women-owned businesses (MBEs and WBEs) in City procurement and the availability of MBE/WBEs even with the small business program in place.

For questions relating to this solicitation, contact: McPhallDT@cityofgainesville.org

Bidder is not in arrears to City upon any debt, fee, tax or contract: [x] Bidder is NOT in arrears [] Bidder IS in arrears
Bidder is not a defaulter, as surety or otherwise, upon any obligation to City: [x] Bidder is NOT in default [] Bidder IS in default

Bidders who receive this bid from sources other than City of Gainesville Procurement Division or DemandStar.com MUST contact the Procurement Division prior to the due date to ensure any addenda are received in order to submit a responsible and responsive offer. Uploading an incomplete document may deem the offer non-responsive, causing rejection.

ADDENDA ACKNOWLEDGMENT: Prior to submitting my offer, I have verified that all addenda issued to date are considered as part of my offer: Addenda received (list all) # 1 (12/30/2020); 2 (12/31/2020)

Legal Name of Bidder: MGT of America Consulting, LLC

DBA:

Authorized Representative Name/Title: Fred Seamon / Executive Vice President

E-mail Address: Proposals@mgtconsulting.com FEIN: 81-0890071

Street Address: 4320 West Kennedy Boulevard, Tampa, Florida 33609

Mailing Address (if different): Same as above

Telephone: (888) 302.0899 Fax: (850) 385.4501

By signing this form, I acknowledge I have read and understand, and my business complies with all General Conditions and requirements set forth herein; and,

- [x] Proposal is in full compliance with the Specifications.
[] Proposal is in full compliance with the Specifications except as specifically stated and attached hereto.

SIGNATURE OF AUTHORIZED REPRESENTATIVE: Fred Seamon

SIGNER'S PRINTED NAME: Fred Seamon DATE: 12/30/2020

This page must be completed and uploaded to DemandStar.com with your Submittal.



ADDENDUM NO. 1

Date: December 30, 2020
Bid Date: January 4, 2021, at 3:00 P.M. (Local Time)

Bid Name City of Gainesville Disparity Study
Bid No.: EODX-210013-DM

NOTE: This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary:

The following are answers/clarifications to questions received:

1. Any questions shall be submitted in writing to the City of Gainesville Purchasing Division by 3:00 p.m. (local time), December 28, 2020. Questions may be submitted as follows:
Email: mcphalldt@cityofgainesville.org

2. Please find attached:
 - a) Copy of the blackout period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters).

3. Question: Confirm Attachments 4, 5, and 6 are to be completed and returned with proposals?

Answer: These attachments do not have to be completed by bidders. These were included for vendors to be able to view what documents the City utilizes because this may be data consultants will request during the analysis.

4. Question: Is there a MBE/WBE participation goal for the study?
 - If so, provide.
 - What certifications does the City accept?

Answer: No, there is no MBE/WBE participation goal.

5. Question: The RFP states that draft report is due within 13 months from project initiation, which is the total timeline in which the City would like to have the study completed?

Answer: We have answered your question regarding proposed study schedule below referencing *Task 12 on pages 10 and 11 of RFP # EODX-210013-DM, City of Gainesville Disparity Study issued December 3, 2020.*

Task 12. Presentations, reports and other deliverables specifies study schedule under parts **d, e, f** and **g**. A summary follows:

- d. Draft report components (key report chapters and appendices) -- **to be submitted within 11 months of Notice to Proceed (NTP)**;
- e. Complete draft report (including Executive Summary) of a quality suitable for public distribution -- **to be submitted within 13 months of NTP**;
- f. Presentation of study results including three formal presentations: one to City Leadership, one to City Council and one a Town Hall -- **at about Month 13 of the project schedule**; and
- g. Complete final report delivered in electronic format within three weeks of receiving final comments from the public or other groups on the published draft report -- **expected to be around Month 15 of the project schedule.**

6. Question: What is the allocated budget for the study?

Answer: We rely on subject matter experts to submit a competitive price within the current market.

7. Question: The Sample Contract within the RFP does not include a limitation of liability. We would like the contract revised to limit the liability of the Contractor to the value of the contract.

Answer: This terms that you are referencing are sample terms and the actual terms will only be negotiated with the winning “bidder” to this project.

8. Question: The Sample Contract within the RFP includes examples of payment terms. We would like the contract payment terms revised to state that the City will pay invoices within 30 days of receipt.

Answer: This terms that you are referencing are sample terms and the actual terms will only be negotiated with the winning “bidder” to this project.

9. ***Bid Opening Information via Zoom Meeting Monday, January 4, 2021 at 3:00P.M. Attendance is NOT Mandatory.***

<https://us02web.zoom.us/j/84127315170?pwd=a21YSWZ6V2kzalc3S1k1U0N6M1ZKZz09>

Meeting ID: 841 2731 5170

Passcode: 7df3TV

One tap mobile

CITY OF _____
GAINESVILLE

FINANCIAL SERVICES
PROCEDURES MANUAL

41-423 Prohibition of lobbying in procurement matters

Except as expressly set forth in Resolution 060732, Section 10, during the blackout period as defined herein no person may lobby, on behalf of a competing party in a particular procurement process, City Officials or employees except the purchasing division, the purchasing designated staff contact. Violation of this provision shall result in disqualification of the party on whose behalf the lobbying occurred.

Black out period means the period between the issue date which allows for immediate submittals to the City of Gainesville Purchasing Department for an invitation for bid or the request for proposal, or qualifications, or information, or the invitation to negotiate, as applicable, and the time the City Officials and Employee awards the contract.

Lobbying means when any natural person for compensation, seeks to influence the governmental decision making, to encourage the passage, defeat, or modification of any proposal, recommendation or decision by City Officials and Employees, except as authorized by procurement documents.

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ADDENDUM NO. 2

Date: December 31, 2020
Bid Date: January 4, 2021, at 3:00 P.M. (Local Time)

Bid Name City of Gainesville Disparity Study
Bid No.: EODX-210013-DM

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Proposal_20210304

NOTE: This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary:

The following are answers/clarifications to questions received:

1. Please find attached:
 - a) Copy of the blackout period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters).
2. Question: On page 13, 4.1d-Qualifications, it includes one minimum qualification, and states that a bidder that fails to provide supporting documentation will not be further considered. The minimum requirement listed is that at least one member of the study team demonstrates participation in the completion of at least one disparity study in the past five years. Please provide examples of the documentation required--i.e., list of studies team members have participated in during the past five years, sample report listing team members, etc.?

Answer: We would like to see all individuals identified specifically who have directly participated in the completion of a disparity study within the past 5 years. This should include any sample reports identifying the team member(s) involved in the study. Additionally, please include what their role was explicitly throughout the study to its completion. You will only need to name **one** study for each member that has been involved in a disparity study—a link to the study would also be preferred.

3. Question: On page 17, 5.1b, Technical Qualifications Evaluation, it indicates that a firm's record with providing this type of work, particularly in the City of Gainesville or State of Florida, will be assessed. If a firm has significant experience in conducting disparity studies in locations other than Gainesville or State of Florida, how will this affect evaluation of the firm's qualifications?

Answer: Please refer back section 17, 5.1b, Technical Qualifications Evaluation.

4. Question: Is the City's procurement centralized or decentralized?

Answer: Currently, the City Of Gainesville is using centralized and decentralized procurement. The City's departments can make purchases up to \$50,000.00 within the department. Any purchases \$50,000.00 or greater must go through the procurement department or identify a method of source selection.

5. Question: Is there any specific financial documentation required to be submitted with proposal?

Answer: A narrative/statements or any documents that demonstrate financial stability is acceptable.

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 2 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 2 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER: MGT of America Consulting, LLC

BY: 

DATE: 1/4/2021

CITY OF _____ FINANCIAL SERVICES GAINESVILLE PROCEDURES MANUAL

41-423 Prohibition of lobbying in procurement matters

Except as expressly set forth in Resolution 060732, Section 10, during the blackout period as defined herein no person may lobby, on behalf of a competing party in a particular procurement process, City Officials or employees except the purchasing division, the purchasing designated staff contact. Violation of this provision shall result in disqualification of the party on whose behalf the lobbying occurred.

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DRUG-FREE WORKPLACE FORM

The undersigned bidder in accordance with Florida Statute 287.087 hereby certifies that

MGT of America Consulting, LLC

does:

(Name of Bidder)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for the drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this bidder complies fully with the above requirements.



Bidder's Signature

12/30/2020

Date

In the event of a tie bid, bidders with a Drug Free Workplace Program will be given preference. To be considered for the preference, this document must be completed and uploaded to DemandStar.com with your Submittal.

BIDDER VERIFICATION FORM**LOCAL PREFERENCE** (Check one)Local Preference requested: YES NO

A copy of the following documents must be included in your submission if you are requesting Local Preference:

- Business Tax Receipt
- Zoning Compliance Permit

QUALIFIED SMALL BUSINESS AND/OR SERVICE DISABLED VETERAN BUSINESS STATUS (Check one)Is your business qualified, in accordance with the City of Gainesville's Small Business Procurement Program, as a local Small Business? YES NOIs your business qualified, in accordance with the City of Gainesville's Small Business Procurement Program, as a local Service-Disabled Veteran Business? YES NO**LIVING WAGE COMPLIANCE**

See Living Wage Decision Tree:

(Check one)

- Living Wage Ordinance does not apply (check all that apply)
- Not a covered service
 - Contract does not exceed \$100,000
 - Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.
 - Located within the City of Gainesville enterprise zone.
- Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.

REGISTERED TO DO BUSINESS IN THE STATE OF FLORIDA

Is Bidder registered with Florida Department of State's, Division of Corporations, to do business in the State of Florida?

 YES NO (refer to Part 1, 1.6, last paragraph)If the answer is "YES", provide a copy of SunBiz registration or SunBiz Document Number (# L15000199435)

If the answer is "NO", please state reason why: _____

DIVERSITY AND INCLUSION (Applies to solicitations above \$50,000)Does your company have a policy on diversity and inclusion? YES NO

If yes, please attach a copy of the policy to your submittal.

Note: Possessing a diversity and inclusion policy will have no effect on the City's consideration of your submittal, but is simply being requested for information gathering purposes.

MGT of America Consulting, LLC

Bidder's Name

Fred Seamon / Executive Vice President

Printed Name/Title of Authorized Representative



Signature of Authorized Representative

12/30/2020

Date

This page must be completed and uploaded to DemandStar.com with your Submittal.

806 DIVERSITY IN RECRUITING AND COMMUNITY

DIVERSITY IN RECRUITING

Active recruiting programs, where applicable, will be carried out at secondary schools, community colleges, and colleges with predominantly minority and female enrollments. Recruiting efforts at all schools will incorporate efforts to reach minorities; females; individuals with disabilities; and Vietnam era, special disabled, recently separated, and other protected veterans. MGT and its subcontractors will make job opportunity information equally available to potential applicants from both protected and non-protected class groups, unless there is a bona fide occupational requirement for a particular job. MGT will actively encourage its current minority and female employees to recruit other minorities and females, and where reasonable will provide after-school, summer, and vacation employment to minorities and females. Recruitment brochures work situations will include minority, female, and disabled members of the workforce. Special efforts will be made to include minorities, females, individuals with disabilities, and veterans on personnel relations staff. Our diversity efforts are defined as striving to have a workforce composed of employees with varying characteristics including, but not limited to, religious and political beliefs, gender, ethnicity, education, socioeconomic background, sexual orientation, and geographic location. To encourage the hiring and retention of a diverse workforce, we do not limit ourselves to a specific geographic region when hiring and have national talent searches in a variety of diverse regions where minority candidates from a multi-generations and cultures are available. We encourage our own employees of a wide range of diversity to refer candidates as part of our bonus referral program. We are culturally sensitive when advertising jobs to attract a diverse candidate pool. We offer flexible work schedules, which allows us to accommodate cultural and religious holidays, and we also offer a floating holiday annually.

DIVERSITY IN THE COMMUNITY

The Firm will evaluate the performance of its management and supervisory personnel on the basis of their involvement in achieving our affirmative action objectives as well as other established criteria. Any employee or subcontractor of MGT of America Consulting, LLC., who does not comply with the EEO policies and procedures set forth in our affirmative action plan will be subject to disciplinary action. Any subcontractor of the Firm who does not comply with all applicable EEO/affirmative action laws, directives, and regulations of the federal, state, and local governing bodies or agencies thereof will be subject to appropriate legal sanctions. The firm has a designated coordinator of the EEO and affirmative action plan to monitor all activities and reporting on the effectiveness.

MGT will take affirmative action to ensure that all employment practices are free of discrimination against such persons. Such employment practices include, but are not limited to, the following: hiring, upgrading, demotion, transfer, recruitment or recruitment advertising, selection for layoff, disciplinary action, termination, establishment of rates of pay or other forms of compensation, and selection for training, including apprenticeship. MGT is on a journey dedicated to our strategy. To leverage our vast body of work; the unique capability and character of our people and our recognized brand; to grow a focused, competitive, and trusted public sector consulting leader. This demonstrates our commitment to having a workforce that represents a wide range of skills, backgrounds, and character traits.

REFERENCE FORM

200890_Request for Proposal_20210304

Name of Bidder: MGT of America Consulting, LLC

Provide information for three references of similar scope performed within the past three years. You may include photos or other pertinent information.

#1 Year(s) services provided (i.e. 1/2015 to 12/2018): 6/2017-6/2019

Company Name: City of Tallahassee
Address: 315 S. Calhoun St.
City, State Zip: Tallahassee, FL 32301
Contact Name: Darryl Jones, Deputy Director, Tallahassee-Leon County Office of Economic Vitality
Phone Number: 850.300.4567 Fax Number: _____
Email Address (if available): DJones@oeforbusiness.org

#2 Year(s) services provided (i.e. 1/2015 to 12/2018): 12/2016-1/2018

Company Name: City of Miramar
Address: 2200 Civic Center Place
City, State Zip: Miramar, FL 33025
Contact Name: Natalie Richmond, Procurement Analyst
Phone Number: 954.602.3196 Fax Number: _____
Email Address (if available): narichmond@miramarfl.gov

#3 Year(s) services provided (i.e. 1/2015 to 12/2018): 3/2017-3/2018

Company Name: Osceola County
Address: 1 Courthouse Square
City, State Zip: Kissimmee, FL 34741
Contact Name: Horace Nwachukwu, Osceola County Commission Auditor
Phone Number: 407.742.6400 Fax Number: _____
Email Address (if available): Chijoke.Nwachukwu@osceola.org

This page must be completed and uploaded to DemandStar.com with your Submittal.

CERTIFICATION OF COMPLIANCE WITH LIVING WAGE

The undersigned hereby agrees to comply with the terms of the Living Wage Ordinance and to pay all covered employees, as defined by City of Gainesville Ordinance 020663 as amended at 030168 (Living Wage Ordinance), during the time they are directly involved in providing covered services under the contract with the City of Gainesville for Disparity Study a living wage of \$21.01 per hour to covered employees who receive Health Benefits from the undersigned employer and \$21.01 per hour to covered employees not offered health care benefits by the undersigned employer.

Name of Service Contractor/Subcontractor: MGT of America Consulting, LLC

Address: 4320 W. Kennedy Blvd., Tampa, FL 33609

Phone Number: 888.302.0899


Name of Local Contact Person: Fred Seamon

Address: 516 N. Adams St., Tallahassee, FL 32301

Phone Number: 850.212.6458

\$ 355,981
(Amount of Contract)

Fred Seamon, Executive Vice President
Printed Name/Title of Authorized Representative

 \ 12/30/2020
Signature of Authorized Representative Date

This page must be completed and uploaded to DemandStar.com with your Submittal, if the Living Wage Ordinance applies to bidder.

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	<p>1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. MGT OF AMERICA, LLC 81-0878597</p> <p>2 Business name/disregarded entity name, if different from above MGT OF AMERICA CONSULTING, LLC 81-0890071</p> <p>3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.</p> <p> <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ P <small>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</small> <input type="checkbox"/> Other (see instructions) ▶ </p>	<p>4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from FATCA reporting code (if any) _____</p> <p><small>(Applies to accounts maintained outside the U.S.)</small></p>
	<p>5 Address (number, street, and apt. or suite no.) See instructions. 4320 WEST KENNEDY BLVD., SUITE 200</p> <p>6 City, state, and ZIP code TAMPA, FL 33609</p> <p>7 List account number(s) here (optional)</p>	<p>Requester's name and address (optional)</p>

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
or									
Employer identification number									
8	1		0	8	7	8	5	9	7

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶	Date ▶ 09.09.2020
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



September 28, 2017

MEMORANDUM

To Whom It May Concern:

MGT of America Consulting, LLC (formerly MGT of America, Inc.) is a wholly owned subsidiary of MGT of America, LLC. As such, our Form W-9 will show the holding company of MGT of America, LLC under its own FEIN, with MGT of America Consulting, LLC as a disregarded entity for tax reporting purposes.

MGT of America Consulting, LLC was brought under MGT of America, LLC in December 2015. Since that time, MGT of America Consulting, LLC has been lawfully and correctly conducting business in its own name and with its own FEIN. However, as the Form W-9 is an administrative item for the IRS to connect Form 1099's reported to the IRS with the correct taxpayer, it shows MGT of America, LLC as the parent company who files a consolidated tax return for itself AND its wholly owned subsidiaries. Our subsidiary companies will point back to MGT of America, LLC, which is why we still conduct business licensing, vendor registrations, contracts, and invoicing under the MGT of America Consulting, LLC name/FEIN. This is why we contracted under MGT of America Consulting, LLC and its FEIN but our parent company, MGT of America, LLC is shown on our W-9. (We have pasted and highlighted the relevant language governing completion of the W-9 below. Excerpts are from pages 2 and 3 of Form W-9. (Rev. 12-2014))

Specific Instructions (Page 2)**Line 1**

e. Disregarded entity. For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. **The name of the entity entered on line 1 should never be a disregarded entity.** The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Part I. Taxpayer Identification Number (TIN) (Page 3)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see How to get a TIN below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN. However, the IRS prefers that you use your SSN.

If you are a single-member LLC that is disregarded as an entity separate from its owner (see Limited Liability Company (LLC) on this page), enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

If you have any questions, please contact me by email at LLopez@mgtconsulting.com or by telephone at 727.709.2226. Thank you very much.

Respectfully,

Louise Lopez
Vice President - Finance



State of Florida

Department of State

I certify from the records of this office that MGT OF AMERICA CONSULTING, LLC is a limited liability company organized under the laws of the State of Florida, filed on December 2, 2015.

The document number of this limited liability company is L15000199435.

I further certify that said limited liability company has paid all fees due this office through December 31, 2020, that its most recent annual report was filed on February 5, 2020, and that its status is active.

*Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capital, this
the Eighteenth day of November,
2020*



Randy R. Lee
Secretary of State

Tracking Number: 0876943356CU

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

TABULATION OF SUBCONTRACTORS AND MATERIAL SUPPLIERS

The Undersigned states that the following is a complete list of the proposed Subcontractors and Material Suppliers on this Project and the class of work to be performed by each, and that such list will not be added to nor altered without written consent of the City of Gainesville. This form should be completed and submitted with the bid.

Please TYPE or PRINT legibly. Use additional sheets as necessary.

SUBCONTRACTORS

Company Name	Company Phone Number	Class of Work	% or Price of Work	Qualified Local Small Business
1. Abelita LLC	202.431.1187	in-depth interviews, community engagement mtgs., stakeholder interviews	5.7%	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
2.				<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Oppenheim Research, Inc.	850.201.0480	custom census, vendor anecdotal surveys	15.8%	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
4.				<input type="checkbox"/> Yes <input type="checkbox"/> No
5.				<input type="checkbox"/> Yes <input type="checkbox"/> No

MATERIALS SUPPLIERS

Company Name	Company Phone Number	Type of Supply/Material	% or Price of Materials	Qualified Local Small Business
1.				<input type="checkbox"/> Yes <input type="checkbox"/> No
2.				<input type="checkbox"/> Yes <input type="checkbox"/> No
3.				<input type="checkbox"/> Yes <input type="checkbox"/> No
4.				<input type="checkbox"/> Yes <input type="checkbox"/> No
5.				<input type="checkbox"/> Yes <input type="checkbox"/> No

Bidding Company Name: MGT of America Consulting, LLC

Form Completed By: Ashley Roseborough

Date: 12/30/2020

Title: Manager

PROPOSED SUBCONTRACTORS FORM

Name of Bidder: MGT of America Consulting, LLC

This form is for all Subcontractors being utilized on this project.

Name of Contractor: Abelita LLC

Address: 203 Young Street, Tallahassee, FL 32301

Scope of Work to be Performed: in-depth interviews, community engagement mtgs., stakeholder interviews

Total \$ Value: \$ 20,250 % of Total BID/RFP: 5.7 %

Name of Contractor: Oppenheim Research, Inc.

Address: 1640 Metropolitan Circle, Tallahassee, FL 32308

Scope of Work to be Performed: custom census, vendor anecdotal surveys

Total \$ Value: \$ 56,250 % of Total BID/RFP: 15.8 %

Name of Contractor: _____

Address: _____

Scope of Work to be Performed: _____

Total \$ Value: \$ _____ % of Total BID/RFP: _____ %

Name of Contractor: _____

Address: _____

Scope of Work to be Performed: _____

Total \$ Value: \$ _____ % of Total BID/RFP: _____ %

Name of Contractor: _____

Address: _____

Scope of Work to be Performed: _____

Total \$ Value: \$ _____ % of Total BID/RFP: _____ %

SUBCONTRACTOR INFORMATION FORM

List any subcontractors that will be used for the Work along with the goods or services to be provided. If the subcontractor is a small or minority-owned business, check the boxes that apply. The selected prime XXXX will be asked to provide the actual subcontractor spend amount at a later date.

Small Business Enterprise (SBE): Independently owned with a net worth of not more than five million dollars and employs 200 or fewer permanent full-time employees.

Minority Business Enterprise (MBE): 51% owned and managed by a minority. African-American, Asian-American, Hispanic-American, Native-American, or American women owned.

Service-Disabled Veteran Enterprise (SDVE): At least 51% owned and managed by a veteran who has been certified as a service-disabled veteran by the Florida Department of Management Services or other agency.

Subcontractor Name	Goods or Service to be provided	Business Type		
		SBE	MBE	SDVE
Abelita LLC	in-depth interviews, community engagement mtgs., stakeholder interviews		X	
Oppenheim Research, Inc.	custom census, vendor anecdotal surveys		X	

**MGT of America, LLC
and Subsidiaries**

June 30, 2019 and 2018

**Consolidated Financial Statements and
Independent Auditor's Report**



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INDEPENDENT AUDITOR'S REPORT

200890_Request for Proposal_20210304

To the Members
MGT of America, LLC and Subsidiaries
Tampa, Florida

We have audited the accompanying consolidated financial statements of MGT of America, LLC and Subsidiaries ("Company"), which comprise the consolidated balance sheets as of June 30, 2019 and 2018, and the consolidated statement of operations, consolidated statement of changes in members' equity, and consolidated statement of cash flows for the years then ended, and the related notes to the consolidated financial statements.

Management's Responsibility for the Consolidated Financial Statements

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these consolidated financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the consolidated financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the consolidated financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the consolidated financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating overall presentation of the consolidated financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Experienced, resourceful and passionate about your needs

INDEPENDENT AUDITOR'S REPORT (Continued)

Opinion

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of MGT of America, LLC and Subsidiaries as of June 30, 2019 and 2018, and the results of its consolidated operations and its consolidated cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Is and company

Is and company

St. Petersburg, Florida
December 19, 2019

MGT of America, LLC and Subsidiaries
Consolidated Balance Sheets
As of June 30, 2019 and 2018

200890_Request for Proposal_20210304

	2019	2018
Assets		
Current Assets:		
Cash and cash equivalents	\$ 582,023	\$ 1,472,861
Accounts receivable, net	4,196,896	4,552,784
Unbilled receivables	3,378,493	2,172,756
Prepaid expenses	210,321	84,493
Total current assets	8,367,733	8,282,894
Property and equipment, net	493,413	503,687
Goodwill	4,821,833	5,013,724
Other assets and intangibles, net	1,002,556	426,074
Deposits	30,672	57,232
Total other assets	6,348,474	6,000,717
Total assets	\$ 14,716,207	\$ 14,283,611
Liabilities and members' equity		
Current liabilities:		
Accounts payable	\$ 759,511	\$ 1,195,105
Accrued liabilities	923,697	1,475,866
Due to (from) related parties	151,103	(31,619)
Equipment Lease	-	91,000
Lines of credit	3,082,815	2,959,195
Deferred revenue	206,283	159,563
Term Loan, current portion	267,257	292,579
Related party notes payable, current portion	217,171	221,632
Total current liabilities	5,607,837	6,363,321
Long-term liabilities:		
Capital Lease	-	138,300
Accrued benefits	514,067	514,066
Term loan, less current portion	704,981	981,400
Related party notes payable, less current portion	1,433,166	1,657,513
Total liabilities	8,260,051	9,654,600
Members' equity:		
Total liabilities and members' equity	\$ 14,716,207	\$ 14,283,611

Read accompanying Independent Auditor's Report and Notes to Consolidated Financial Statements.

MGT of America, LLC and Subsidiaries
Consolidated Statement of Operations
For the Years Ended June 30, 2019 and 2018

	<u>2019</u>	<u>2018</u>
Revenue	\$ 24,276,690	\$ 24,040,737
Salaries and benefits	12,885,965	10,426,609
Contract labor	4,676,699	6,872,091
Travel	<u>1,853,537</u>	<u>1,813,444</u>
	<u>19,416,201</u>	<u>19,112,144</u>
Gross profit	<u>4,860,489</u>	<u>4,928,593</u>
General and administrative expenses		
Operating expenses	2,290,570	2,087,757
Occupancy	434,323	466,721
Interest	299,702	245,535
Depreciation and amortization	<u>303,102</u>	<u>95,132</u>
Total general and administrative expenses	<u>3,327,697</u>	<u>2,895,145</u>
Other income	174,237	359,000
Net income	<u>\$ 1,707,029</u>	<u>\$ 2,392,448</u>

200890_Request for Proposal_20210304

Read accompanying Independent Auditor's Report and Notes to Consolidated Financial Statements.

MGT of America, LLC and Subsidiaries
Consolidated Statement of Changes in Members' Equity
For the Years Ended June 30, 2019 and 2018

	Total	Common Units	Preferred Units
June 30, 2017	\$ 3,829,680	\$ 1,953,218	\$ 1,876,462
Net income before taxes	2,392,448	2,392,448	-
Priority charges	-	(191,934)	191,934
Common shares vested/purchased	136,907	136,907	-
Shares purchased	(1,727,764)	(121,464)	(1,606,300)
Distributions	(2,260)	(2,260)	-
June 30, 2018	\$ 4,629,011	\$ 4,166,915	\$ 462,096
Net income before taxes	1,707,029	1,707,029	-
Priority charges	-	(115,524)	115,524
Common shares vested/purchased	138,970	138,970	-
Distributions	(18,854)	(18,854)	-
June 30, 2019	\$ 6,456,156	\$ 5,878,536	\$ 577,620

200890_Request for Proposal_20210304

Read accompanying Independent Auditor's Report and Notes to Consolidated Financial Statements.

MGT of America, LLC and Subsidiaries
Consolidated Statement of Operations
For the Years Ended June 30, 2019 and 2018

200890_Request for
Proposal_20210304

	2019	2018
Cash Flow from operating activities		
Net Income	\$ 1,707,029	\$ 2,392,448
Adjustments to reconcile net income to net cash provided by operating activities:		
Depreciation and amortization	303,102	95,132
Change in allowance for bad debts	143,648	-
Gain on preferred member unit redemption		(359,000)
Employee units vested	138,970	136,907
Change in operating assets and liabilities		
Accounts receivable and unbilled	(849,849)	(1,461,983)
Prepaid assets	(125,828)	(91,863)
Due to related party	182,722	(32,063)
Deposits and other assets	26,560	(4,072)
Deferred revenue	46,720	(922,186)
Accounts payable and accrued expenses	(987,762)	517,394
Net cash from operations	585,312	270,714
Cash flow from investing activities		
Purchase of property and equipment	(143,647)	(185,439)
Acquisitions and long term contracts	(576,482)	(232,249)
Payments on capital leases	(229,300)	(42,107)
Distributions to members	(18,854)	(2,260)
Net cash from investing activities	(968,283)	(462,055)
Cash flow from financing activities		
Payments on line of credit, net	(123,620)	609,002
Principal payments on debt	(270,017)	(1,396,768)
Payments on related party debt	(242,230)	(31,619)
Proceeds from VNB loan	128,000	1,310,000
Net cash from financing activities	(507,867)	490,615
(Decrease) increase in cash	(890,838)	299,274
Cash, beginning of year	1,472,861	1,173,587
Cash, end of year	\$ 582,023	\$ 1,472,861
Supplemental Disclosure of cash flow information:		
Cash paid during the year for interest	\$ 299,702	\$ 245,535
Supplemental schedule of non cash financing and investing activities		
Related party notes with former founders in exchange for their preferred interests		\$ 1,206,000

Read accompanying Independent Auditor's Report and Notes to Consolidated Financial Statements.

Notes to Consolidated Financial Statements**As of June 30, 2019 and 2018 and for the Years Ended June 30, 2019 and 2018****1. Description of Business**

MGT of America, LLC (MGT) along with its subsidiaries (MGT of America Consulting, LLC and Strategos Public Affairs, LLC) (collectively called “the Company”) is a nationwide professional services firm that delivers a diverse range of consulting services to public and public related agencies in the following markets: financial services, educational transformation, PK-12, higher education, facilities, disparity, human resources, and cyber security.

2. Basis of Presentation and Consolidation

The accompanying audited consolidated financial statements of the Company have been prepared in accordance with accounting principles generally accepted in the United States of America (U.S. GAAP) and reflect the financial statement presentation and disclosure requirements under U.S. GAAP. The consolidated financial statements include the accounts of MGT along with its subsidiaries as noted above. All significant intercompany transactions have been eliminated in consolidation.

3. Summary of Significant Accounting policies under US GAAP**Use of Estimates**

The preparation of consolidated financial statements in conformity with US GAAP requires management to make estimates and assumptions that affect the amounts reported in the consolidated financial statements and accompanying disclosures. Actual results could differ from those estimates.

Cash and Cash Equivalents

The Company considers all highly liquid investments with a maturity of three months or less when purchased to be cash equivalents. Cash and cash equivalents include cash or deposits with financial institutions and deposits in highly liquid money market securities. Deposits with financial institutions are insured by the Federal Deposit Insurance Corporation (FDIC) up to \$250,000 per depositor. Bank deposits at times may exceed federally insured limits. Amounts over the FDIC insurance limit at June 30, 2019 and 2018 were approximately \$461,900 and \$1,409,600, respectively.

Accounts Receivable, Net

The Company carries its accounts receivable at face value less an allowance for doubtful accounts. The allowance for doubtful accounts is established to cover probable and reasonably estimable losses. The Company evaluates its accounts receivable and establishes an allowance for doubtful accounts based on historical experience, aging analyses, specifically identified troubled receivable balances that are past due and other currently available information, including macroeconomic factors. Uncollectible receivables are charged to bad debt expense when that determination is made. Bad debt expense for the year ended June 30, 2019 and 2018 was \$146,000 and \$8,000, respectively. Allowance for doubtful accounts was \$166,700 and \$29,000 for the years ended June 30, 2019 and 2018.

MGT of America, LLC and Subsidiaries
Notes to Consolidated Financial Statements
As of June 30, 2019 and 2018 and for the Years Ended June 30, 2019 and 2018

3. Summary of Significant Accounting policies under US GAAP - Continued

Property and Equipment, Net

Property and equipment are carried at cost, net of accumulated depreciation and amortization. Maintenance repairs and minor improvements are expensed as incurred. Depreciation is computed using the straight-line method of depreciation over the estimated useful lives of the assets, as follows:

Technology equipment and software	3 to 5 years
Furniture and fixtures	15 years
Leasehold improvements	Term of lease

Goodwill and Intangible Assets

Goodwill consists of the excess of purchase price over the fair value of identifiable net assets of companies acquired. In accordance with the Accounting Standards Codification (“ASC”) 350 “Intangibles-Goodwill and Other”, the carrying amount of goodwill and intangible assets is to be reviewed at least annually for impairment, and losses in value, if any, will be charged to operations in the period of impairment. Accounting Standards Update 2011-8 permits an entity to evaluate qualitative factors to assess whether impairment is more likely than not to have occurred. The test for impairment was completed for the years ended June 30, 2019 and 2018. Goodwill was determined to not be impaired for the years ended June 30, 2019 and 2018.

In June 2019, partners of Fiscal Choice joined the Company. They were given one year employment agreements with earn out targets of \$100,000 if performance metrics were met. In August 2017, the Company acquired the assets of Anderson Strickler (AS), a management consultancy firm for \$50,000 at closing and \$286,000 payable over the next three years based on AS achieving certain earn out targets. Earn out targets were not met for the first payoff of \$50,000 due in August 2018 except for the guarantee of \$25,000. The remaining targets to achieve the additional payouts in 2019 and 2020 will not be met and goodwill was adjusted by \$211,000 to reflect that these payoffs would not occur.

Intangible assets are recorded at their estimated fair value at the date of acquisition. Intangible assets are amortized using the straight-line method over 15 years. Intangible assets are reviewed for impairment whenever events or changes in circumstances indicate the carrying value may not be recoverable. Assets that are deemed to be potentially impaired are evaluated for recoverability based upon management’s estimates of future discounted cash flows. If the carrying value exceeds the recoverable amount of the asset, the deficiency is recorded as an impairment loss. No fixed or intangible assets impairment charges were recorded for the years ended June 30, 2019 and 2018.

Fair Value Measurements

The Company’s financial instruments primarily consist of cash, accounts receivable, accounts payable, and debt. The fair value of cash, accounts receivable, and accounts payable approximate carrying value since they are relatively short-term in nature. The carrying value of debt approximates fair value due either to length of maturity or existence of interest rates that approximate the prevailing market rates.

Read accompanying Independent Auditor’s Report.

Notes to Consolidated Financial Statements**As of June 30, 2019 and 2018 and for the Years Ended June 30, 2019 and 2018****3. Summary of Significant Accounting policies under US GAAP - Continued****Income Taxes and Priority Charges**

The Company operates as a partnership for U.S. federal and state income tax purposes with a calendar year end. Generally, the tax liability related to income earned represents obligations of the individual members and has not been reflected in the consolidated financial statements. In the operating agreement, preferred members earn a 4% dividend on capital invested payable at the discretion of management with board approval. This obligation is not charged against earnings but shown as priority charge in the Statement of Changes in Members' equity.

The Company accounts for uncertain tax positions, if any in accordance with FASB Accounting Standards Codification 740. In accordance with these professional standards, the Company recognizes tax positions only to the extent management believes it is "more likely than not" that its tax positions will be sustained upon IRS examination. Management believes it has no uncertain tax positions that qualify for either recognition or disclosure in the consolidated financial statements for the years ended June 30, 2019 and 2018. The Company believes that its income tax filings positions will be sustained upon examination and does not anticipate any adjustments that would result in material adverse effect on the Company's consolidated balance sheet, consolidated statement of operations or consolidated cash flows. Accordingly, the Company has not recorded any accruals for interest and penalties for uncertain income tax positions at June 30, 2019.

The Company's income tax returns are subject to examination by taxing authorities since its formation. At June 30, 2019 the following tax years are subject to examination

<u>Jurisdiction</u>	<u>Open Years for Filed Returns</u>
Federal	December 31, 2016, 2017 and 2018
Various State	December 31, 2016, 2017 and 2018

Revenue Recognition

Revenues include all amounts billable to clients. Revenues are principally recognized as services are rendered by employees of the Company and subcontractors working under the authority of the Company. The impact of performance variances to engagement revenues recognized to date, from changes in expected revenues, are recorded in the period in which these changes become known. Unbilled accounts receivable represents revenues for services rendered and expenses incurred that have not yet been billed. Billings in excess of services rendered are recorded as deferred revenues until the applicable revenue recognition criteria are met. The Company also derives revenues from engagements with incentive-based contracts and other contracts that condition fees on the ability to deliver certain defined goals. Revenues from such engagements are not recognized until a defined goal or milestone is met

Advertising Costs

Advertising costs are charged to expense as incurred. Related expenses included in operating expenses in the accompanying consolidated statement of operations for the years ended June 30, 2019 and 2018 were approximately \$4,700 and \$11,000, respectively.

Read accompanying Independent Auditor's Report.

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3. Summary of Significant Accounting policies under US GAAP - Continued

Credit Risks

The Company provides professional services to many geographically diverse customers primarily across the public sector. The Company performs ongoing credit evaluations of its clients and generally does not require collateral. Accounts receivable are reviewed on a periodic basis and an allowance for doubtful accounts is recorded where such amounts are determined to be uncollectible. Due to the large number of client accounts and the type of client base, management does not believe that a significant exposure from a concentration of credit risk exists.

Reclassifications

The Company has reclassified certain prior year amounts to conform to current year presentation. These reclassifications had no effect on previously reported net income or total equity.

4. Property and Equipment, net

Property and equipment, net consists of the following at June 30:

	2019	2018
Computers and Software	\$ 493,780	\$ 659,484
Furniture and equipment	43,542	80,655
Leasehold improvements	36,170	36,170
Assets under constuction	208,665	151,200
	782,157	927,509
less accumulated depreciation	(288,744)	(423,822)
	\$ 493,413	\$ 503,687

Depreciation expense for the year ended June 30, 2019 and 2018 was approximately \$154,000 and \$53,000, respectively.

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5. Other and Intangible Assets, net

Other and Intangible assets consist of the following:

	2019	2018	Estimated life (years)
Non-complete agreements	\$ 771,277	\$ 771,277	15
Customer relationships	1,088,000	1,088,000	15
Contracts	747,760	118,394	2-4
Other	85,735	-	2-4
	<u>2,692,772</u>	<u>1,977,671</u>	
less accumulated depreciation	<u>(1,690,216)</u>	<u>(1,551,597)</u>	
	<u>\$ 1,002,556</u>	<u>\$ 426,074</u>	

Amortization expense was approximately \$150,000 and \$42,000 for the years ended June 30, 2019 and 2018, respectively. Estimated future amortization is estimated to be approximately \$250,000 for the next four years and \$42,000 thereafter.

6. Line of Credit

The Company has three lines of credit for a total of \$5,150,000 with interest rates of prime plus one percent – approximately 6 % as of June 30, 2019. Interest on the lines is due monthly and the outstanding principal balance is due in full on demand. The outstanding balances owed on the lines of credit at June 30, 2019 and 2018 were approximately \$3,083,000 and \$2,959,000. The lines of credit are collateralized by all assets of the Company. At June 30, 2019 and 2018, the Company is compliant with all covenants.

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7. Long Term Debt

In May 2019, the Company refinanced its \$1,300,000 term loan and restructured the terms of its lines of credit to finance continued growth of the business.

Long Term debt consists of the following:

	2019	2018
Term loan due in monthly installment of \$31,486 and \$24,843 in 2019 and 2018 including interest at 5.5% through January 2023, secured by the assets of the Company and guaranteed by a member of the Company.	\$ 1,229,068	\$ 1,262,094
Term loan due in monthly installments of \$4,500 in 2019 and 2018 including interest at 5% through October 2019. Secured by all assets of Strategos Public Affairs, LLC	17,818	69,485
	1,246,886	1,331,579
Less current installments of long-term debt	(267,257)	(292,579)
Long-term debt, excluding current installments	979,629	1,039,000
Capitalized loan costs	(274,648)	(57,600)
Long-term debt	\$ 704,981	\$ 981,400

As of June 30, 2019, the annual maturities of long-term debt are as follows:

June 30,		
2020	\$	267,257
2021		308,871
2022		335,151
2023		335,607
		\$ 1,246,886

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8. Lease Obligations

The Company leases various operating facilities in Florida, Michigan and California with non-cancelable lease terms through 2025. The leases require payments of taxes and certain other expenses. Office rent expense was approximately \$434,00 and \$466,000 in 2019 and 2018 respectively. The following is a schedule of future minimum rental commitments required under non-cancelable leases that have a minimum initial or remaining non-cancelable lease terms in excess of one year as of June 30, 2019:

<u>June 30,</u>	
2020	\$ 400,000
2021	184,000
2022	<u>151,000</u>
	<u>\$ 735,000</u>

In 2018, the Company began leasing certain computer equipment under leases classified as capital leases. In 2019, the computer equipment under lease was purchased for \$243,000 by the Company and recorded as fixed assets. No other capital leases exist as of June 30, 2019.

9. Retirement Plan

The Company has adopted a 401(k)-profit sharing plan. Eligible employees may contribute elective pre-tax deferrals subject to Internal Revenue Service limitations. The Company matches contributions up to 3% of an employee's compensation. Employee contributions vest over a six year period. Total employer contributions for the year ended June 30, 2019 and 2018 were approximately \$248,000 and \$222,000, respectively.

10. Related Party Transactions

In June 2018, the former founders exchanged their preferred interests for long term notes with an original principal balance of \$1,206,000, payable in 96 monthly principal payments of \$12,706 plus interest of 4.25%. In 2014, CPI, a company majority owned by former stock holders of MGT of America, Inc. entered into a loan agreement with an original principal balance of \$ 1,000,000 with the Company to fund ongoing operations payable monthly through July 15, 2025 plus interest of 6.25%.

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10. Related Party Transactions – Continued

Related party notes consist of the following:

	2019	2018
Related party debt due in monthly payments of \$12,706 plus interest of 4.25% through July 2026	\$ 1,047,114	\$ 1,197,399
Related party debt due in monthly payments of \$9,288 plus interest of 6.25% through September 2025. Secured by accounts receivable of the Company	593,223	671,746
Due to member	10,000	10,000
	\$ 1,650,337	\$ 1,879,145
Less current installments of long-term debt	(217,171)	(221,632)
Long-term debt, excluding current installments	\$ 1,433,166	\$ 1,657,513

As of June 30, 2019, the annual maturities of related party debt are as follows:

June 30,		
2020	\$	217,171
2021		238,329
2022		240,110
2023		252,523
2024		265,604
thereafter		436,600
	\$	1,650,337

In 2019 and 2018, the Company incurred rent expense of approximately \$199,000 and \$226,000; legal costs of \$57,000 and \$124,000; travel costs of \$79,000 and \$115,000 and refinancing costs of \$200,000 and \$72,000 to entities that are owned by members.

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11. Commitments and Contingencies

The Company is involved in litigation arising in the ordinary course of business. Some of the actions and proceedings have been brought on behalf of various claimants and certain of these claimants seek damages of unspecified amounts. While the ultimate outcome of litigation matters cannot be predicted with certainty, it is the current opinion of management that the resolution of such litigation is not likely to have a material adverse effect on the consolidated financial statements.

12. Voting rights

Common units include two classes - Class A common units which have total voting rights while Class C common units have limited voting rights and can be redeemed subject to cash availability and board approval. There were 522,436 and 498,294 vested Class A units and 668,520 and 552,211 Class A issued at June 30, 2019 and 2018, respectively. Class C common units vested and issued were 22,934 and 22,934 at June 30, 2019 and 2018, respectively. At June 9, 2018, Class C units of 9,708 were redeemed as part of the related party transaction described in Note 10.

Preferred units include three types – Preferred A, Preferred B and Preferred C. Preferred A units have no voting rights. They were issued at \$1,000 per unit and can be redeemed at any time at the discretion of the Board. They accrue dividends at Prime plus 3% per annum, cumulative and payable with preference over common units. All 687 units issued and outstanding except 59 were redeemed during June 2018 for notes payable – see note 10. Preferred B units have no voting rights. They were issued at \$12 per unit and can be redeemed at any time at the discretion of the Board. They accrue dividends at 5% of Agreed Value, cumulative, payable monthly, with preference over common units. All 65,384 units were redeemed during June 2018 for notes payable. See note 10. Preferred Class C units have limited voting rights and accrue dividends at 4% to be paid at the discretion of the Board with preference over common units. There were 515,205 units outstanding as of June 30, 2019 and 2018.

13. Subsequent Events

Management has evaluated subsequent events through December 19, 2019, the date on which the consolidated financial statements were available to be issued. No subsequent events were identified that would require adjustment to, or disclosure in, the consolidated financial statements.