

A Proposal for

Oakland Sugar Sweetened Beverage Tax Evaluation Services

Technical and Cost Proposal
November 15, 2023

Submitted to:

City of Oakland
Human Services Department
1 Frank Ogawa Plaza
Oakland, CA 94612
Attention: Michael Akanji,
City Administrator Analyst

Submitted by:

Mathematica
505 14th Street, Suite 800
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November 15, 2023

Michael Akanji
City Administrator Analyst
City of Oakland
1 Frank H. Ogawa Plaza
Oakland, CA 94612

RE: Oakland Sugar Sweetened Beverage Tax Evaluation Services

Dear Michael Akanji:

With the implementation of Measure HH in 2017, the City of Oakland established both a tax on the distribution of sugar sweetened beverages (SSBs) and a Community Advisory Board to recommend to the City Council how to use revenues generated by the tax. The City and Community Advisory Board are committed to studying efforts related to reducing the consumption of SSBs and associated health effects. To that end, Mathematica proposes to continue our partnership with Oakland to address the goals of (1) evaluating programs and services funded by the SSB tax, and (2) understanding how efficiently agencies used funding to promote residents' health. As requested, we are submitting the proposed scope of work and budget via email.

We see this endeavor as an important step to understanding the effects of the SSB tax on Oakland communities, particularly those disproportionately affected by chronic diseases related to SSB consumption. Our team brings together methodological and subject matter expertise, as well as continuity from the previous evaluation of SSB tax-funded programs and services, to flexibly address the City's evaluation priorities.

We look forward to discussing this important project with you further. If you have any questions regarding our submission, please email rfpcenter@mathematica-mpr.com or, if you need to speak to someone directly, call Susan Boudreau, Vice President, Deputy General Counsel, at (609) 297-4536.

Sincerely,



Joshua D. Baker
Vice President, State Medicaid and Health Policy

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I. Introduction

As the leading source of added sugars in the American diet, sugar-sweetened beverages (SSBs) contribute 6 to 7 percent of the calories that youth and adults consume (Rosinger et al. 2017a, 2017b). Frequent SSB consumption has been associated with a variety of negative health outcomes, including obesity and weight gain, type 2 diabetes, heart and kidney diseases, and poor dental health (Malik et al. 2010; Bombback et al. 2010; Valenzuela et al. 2020). As a result of the negative health consequences of SSB consumption, policymakers across the United States—including the City of Oakland—have proposed taxes on SSBs to reduce consumption and improve population health. With the implementation of Measure HH in 2017, Oakland established (1) a tax of 1 cent per fluid ounce on the distribution of SSBs in Oakland and (2) a Community Advisory Board to recommend to the City Council how to use revenues generated by the tax. Oakland has used funding from Measure HH to support programs and services promoting community health through grants and funding allocations to city-run agencies.

The Human Services Department of the City of Oakland seeks a partner to (1) evaluate programs and services funded by the SSB tax and (2) understand how efficiently agencies used funding to promote residents' health. These are complementary goals, because the tax and the programs and services funded from Measure HH have the common goal of promoting the health of Oakland residents, particularly in communities and among populations disproportionately affected by obesity and diet-related chronic diseases.

Below, we describe our approach to assessing the programs funded through the third round of Reducing Consumption of SSB Community Grants Program (2022–2024) and allocations to city agencies (Section II.A). Next, we discuss plans to define and implement measures that a future round of funding recipients could use to describe outcomes across the breadth of funded programs and services (Section II.B).

II. Scope of Work

A. Assess grantee performance (Task 1)

For the period between July 1, 2022, and June 30, 2024, 26 grantees received funding through Measure HH to implement initiatives focused on increasing access to healthy and affordable food and active living, addressing the health impacts of conditions related to high sugar consumption, and promoting community-led engagement. Their primary goal focused on enhancing the well-being of Oakland's residents, particularly for those disproportionately affected by health inequalities and chronic illnesses linked to sugar consumption. In addition to the 26 grantees, about 5 agencies also received Measure HH funding to promote the health of city residents separately from the community grants funding mechanism.

Our proposed approach involves assessing the alignment between the grantees' intended activities and the actual programs and services provided, achievement of program objectives, and the alignment between characteristics of priority populations described in the grant request for proposal (RFP) with those of program participants. With the data collected from those agencies, we will similarly assess the programs funded separately from the community grants. Exhibit 1 shows the

proposed research questions addressed in this approach and the data sources we will use to help answer them.

Exhibit 1. Proposed research questions to assess grantees’ performance

Research questions	Data sources				Program participant interviews
	Application	Statement of work	Grantees' reports	Staff interviews	
Alignment between intended and delivered programs and services					
1. Which organizations did the grantees formally partner with to apply for and implement the grant? – What other groups or organizations did grantees informally collaborate with?	✓	✓	✓ ✓	✓ ✓	
2. What feedback did the grantees receive from the community? – How did the grantees incorporate that feedback into their programs?			✓ ✓	✓ ✓	
3. What are the implementation successes and challenges? – How can the City of Oakland support grantees’ success and address their challenges?			✓	✓	
4. What were the experiences of program participants? – To what extent did programs meet participants’ expectations?					✓ ✓
Achievement of program objectives					
1. What performance goals or objectives did programs set out to achieve?	✓	✓	✓	✓	
2. To what extent did programs achieve these objectives?			✓	✓	
3. How many people did the program serve?			✓	✓	
4. What do grantees envision for the future of their programs?				✓	
Alignment between characteristics of priority populations and program participants					
1. What are the characteristics of program participants (for example, gender, race and ethnicity, and age)?			✓	✓	
2. What level of investment has the City of Oakland made in various communities with Measure HH funds?	✓	✓			
3. What are the geographic areas that grantees served?			✓	✓	

Data collection. We will collect program documents that grantees submitted to the City of Oakland and conduct small-group interviews with people from each grantee familiar with the program’s operations, including managers and frontline staff. We will review data from the applications, statements of work, and grantee reports, and based on this documentation, will summarize program objectives and their achievement, as well as counts of participants and their characteristics.

Next, we will conduct interviews with program staff. We will ask them to review their summaries based on program documents and confirm that they accurately reflect their programs. We will ask them about program implementation challenges, successes, and opportunities for the future of their programs. We will also ask how grantees collect and use feedback from program participants to monitor and improve their programs. We will conduct these 60-minute interviews via video conference. To provide a comprehensive picture of community reach for programs that do not have participant-level data on zip code of residence, we will also pursue supplementary geographic data from grantees, such as the specific locations where they delivered services.

To incorporate the voice of program participants, we will also ask a subset of program staff to refer us to participants who can speak about their experiences with the programs. We propose selecting a subset of programs that are topically representative of the funding areas and reflect a diversity of programs to refer us to participants. We will ask grantees to provide a warm hand-off and connect us directly to the program participants to facilitate scheduling, and offer program participants an incentive payment for their participation. We will conduct brief 30-minute interviews with program participants via video conference.

For the agencies funded separately from the community grants, we will request copies of proposals and progress reports these agencies might have provided to the City of Oakland, as well as any other data they have collected to assess their programs. We anticipate that the range and scope of these activities is broader than that of the community grants programs and services; for example, the previous evaluation revealed that agencies spread funds across multiple programs and services to extend their reach to communities in need or provide higher-quality food in existing federally funded food programs. We propose to adapt the interview protocols for managers and staff from these entities to better reflect their activities, such as probing on each of their programs and services that used Measure HH funding.

Agency profiles and report. For each grantee or additional agency that received Measure HH funding, we will create a visually attractive and easy-to-understand two-page profile summarizing performance. These summaries will include analysis of the information we gather to address the research questions listed in Table 1.

We will produce for the City of Oakland a final report that includes 1) findings on individual grantees and agencies, and 2) a synthesis of themes and insights identified across grantees, including program participants' perspectives on the funded programs. The report will describe opportunities and recommendations on how the programs and services funded through Measure HH can better serve the City's residents. We will also prepare a final briefing of findings from the report to present to the City of Oakland's Community Advisory Board.

B. Outcomes evaluation planning (Task 2)

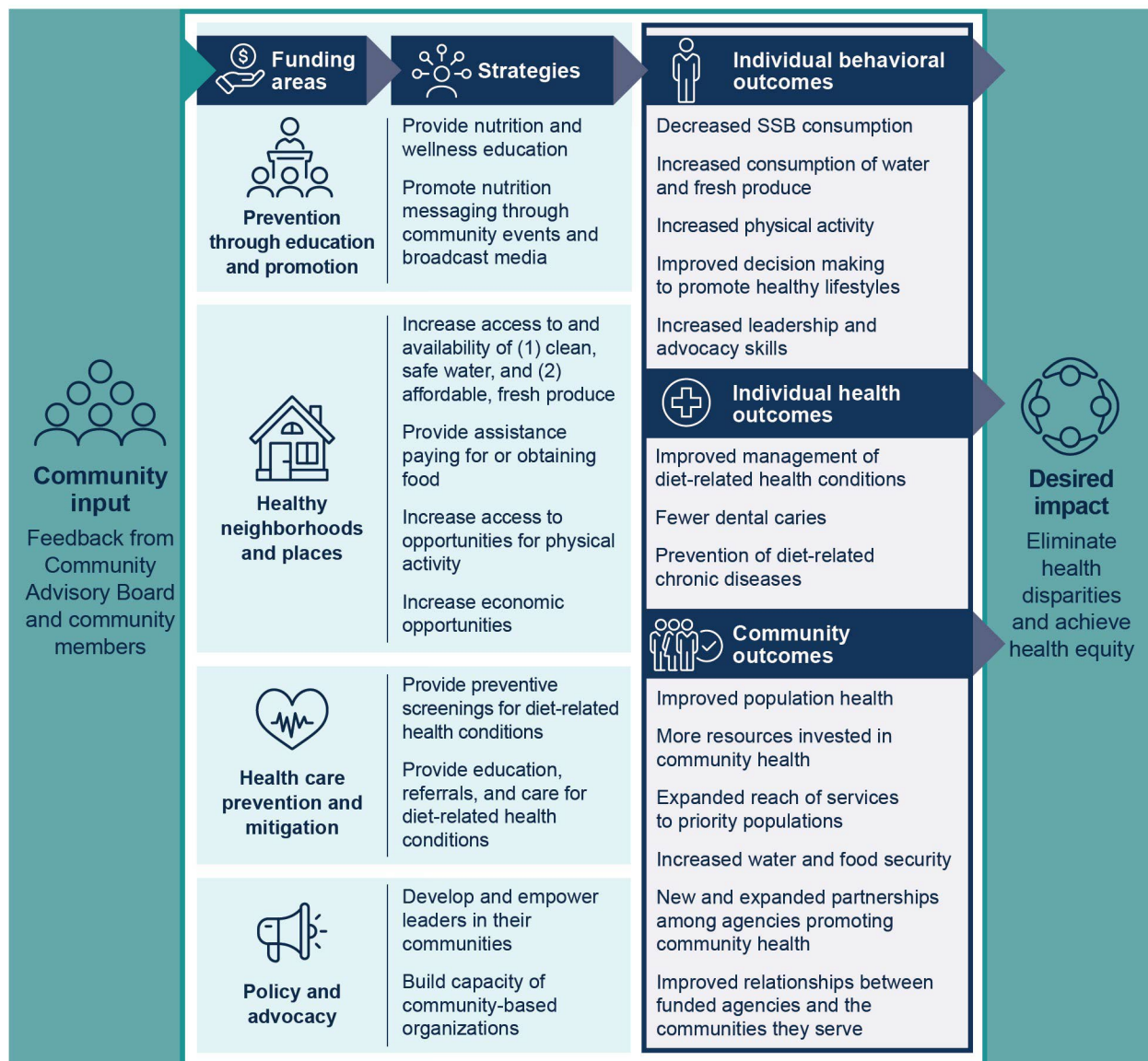
The City of Oakland would like to understand how efficiently grantees used funding to compare performance across grantees. This comparison requires that the grantees report on the same indicators of performance in a uniform manner. Language in the [2022 grant RFP](#) related to outcomes and evaluation asks grantees to define their program objectives, outcomes, and impacts and describe how they will measure them. We will conduct a cross-cutting analysis of grantees' objectives, outcomes, and impacts from Task 1 to identify categories that could be relevant across grantees. If multiple grantees reported objectives, outcomes, and impacts in a standardized way, we

will analyze them as part of Task 1. However, if they are not reported uniformly, we propose to work with the City of Oakland under Optional Task 2 to lay the groundwork for future evaluation activities that can address this need, assuming the city will release another community grants RFP in spring 2024.

Refine theory of change and develop a work plan

Having a detailed theory of change helps ensure that an evaluation design and data collection align with the City of Oakland's investments in funding grantees' programs and their specific activities. A theory of change will also guide the development of evaluation questions that reflect the city and Community Advisory Board's priorities and the selection of indicators to track short-term outcomes. Based on feedback from grantees and city agencies funded between 2019 and 2021, Mathematica drafted a conceptual model illustrating the strategies of programs and services intended to affect individual- and community-level outcomes (Exhibit 2). However, building out a theory of change will require input from those most knowledgeable about the intent of the community grants to identify key pathways the grants intend to affect. Mathematica could facilitate up to three in-person or virtual-group sessions with the City of Oakland staff and Community Advisory Board members to develop an appropriate theory of change reflecting the vision for the next round of grant funding.






Exhibit 2. Conceptual model of 2019–2021 SSB tax-funded programs and services



Next, we will work with the City of Oakland to define research questions and related indicators and measures based on the key pathways in the theory of change. We anticipate the programs and services will continue to be diverse and, therefore, not all the indicators will be appropriate for all grantees. However, establishing a standard set of indicators can facilitate comparisons across grantees that do related work to promote community health.

In Exhibit 3, we illustrate the process of defining outcome measures for one potential pathway that the 2022 grant RFP identified as a priority focus: reducing food insecurity.

Exhibit 3. Illustrative process for defining performance indicators and measures for programs and services to reduce food insecurity

 Strategies	 Activities	 Research questions	 Indicators	 Measures
Increase access to affordable, fresh produce Provide assistance paying for or obtaining food	Operate pop-up produce stands in underserved communities Distribute vouchers for produce Distribute low- or no-cost food bags and boxes	To what extent are priority communities served by programs addressing food insecurity? How much healthy food were programs able to distribute with SSB tax funds?	Location of food distribution Quantity of fresh produce distributed	For the defined reporting period: <ul style="list-style-type: none"> • Address(es) of markets selling or distributing produce • Total number of hours of produce market operation • Total value of vouchers distributed • Total pounds of produce sold or distributed • Unduplicated number of people served
Build capacity of community-based organizations	Encourage grant applications involving multiple agencies Provide opportunities for grantees to meet, collaborate, and learn from one another	To what extent do grantees collaborate with partners to implement programs and services? Did grantees develop new partnerships to operate?	Number of single-agency versus collaborative grant recipients New partnerships between agencies	Number of single-agency grantees; number of collaborative grantees (from grant application) Number of new partnerships established to operate the grant

The regular reports that grantees submit to the City of Oakland document progress of the programs and services of individual grantees. During the development of the theory of change and research questions, our team will work with City of Oakland staff to articulate the evaluation and reporting requirements for a future grant RFP, including an expectation of reporting on measures specific to the services provided by the grantee. This requirement will ensure that a process is in place for the grantees to participate actively in the evaluation and monitoring of their individual programs and services through reporting on performance measures.

Work plan. We will develop a work plan for the City that lays out the rationale, steps, and proposed timeline for implementing the indicators in regular grantee reporting. It will include the theory of change and define indicators and proposed measures that align with funding strategies, activities, and research questions to support the collection and analysis of data we can compare across grantees with similar aims. The plan will also describe preparation to implement the indicators effectively, such as (1) obtaining grantees’ input on the measures and how feasible they are to implement and (2) collaborating with the contractor that tracks grantees’ data to implement a data-capture system.

D. Timeline

We show the proposed timeline and deliverables for evaluation services in Exhibit 4.

Exhibit 4. Timeline for SSB tax evaluation services

Task	Month	1	2	3	4	5	6	7	8	9	10	
		Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
1	Assess grantee performance	████████████████████										
2	Refine conceptual model and develop work plan				████████████████████			████████████████████				
Deliverables												
1	Agency profiles and report							Δ	→	▲		
1	Briefing on agency profiles and report									■		
2	Work plan for outcomes evaluation planning									Δ	→	▲

Δ Draft deliverable ▲ Final deliverable ■ In-person meeting

III. Staffing

We have assembled a diverse team with the range of skills and experiences that can flexibly meet the needs of the evaluation. Our proposed team includes key leadership and support staff who worked on the previous contract with the City and will provide continuity on the current project. The team reflects a depth and breadth of experience across the range of data sources and options and provides the flexibility to adapt to the available data to deliver products that address the City’s priorities. Our team has a deep understanding of community health improvement, strong technical skills for evaluating program implementation and designing and carrying out impact studies, and a collaborative approach for engaging the City, Community Advisory Board, and grantees in evaluation work. The team has in-depth experience evaluating portfolios of programs and services and working with clients to develop evaluation plans that resonate with their needs and the needs of their community. Exhibit 5 illustrates the organization of our proposed team and Exhibit 6 summarizes the team’s qualifications.

Exhibit 5. Team organization to meet the City of Oakland’s evaluation needs

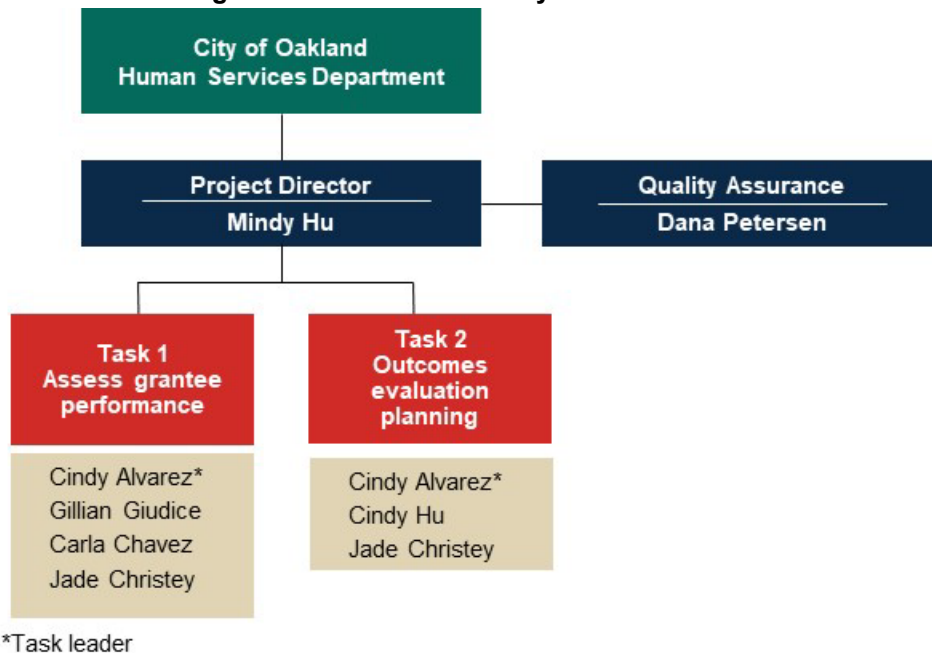


Exhibit 6. Team qualifications to flexibly meet evaluation goals

Personnel name, title	Relevant qualifications
Project and task leads	
Mindy Hu, senior researcher	Mindy Hu (M.P.H., Social Science Research, Mailman School of Public Health, Columbia University), a registered dietitian, will direct the project for the City of Oakland. She has more than 15 years of experience in program evaluations focusing on nutrition, physical activity, and public health. Ms. Hu managed the previous contract for Oakland’s SSB tax evaluation services, which provided timely feedback from across disparate data sources to inform the current round of grant funding. She has led numerous tasks across projects to gather both quantitative and qualitative insights on how programs operate and how to improve programs to serve vulnerable community members better. These projects range from evaluations of federally supported nutrition programs, such as the National School Lunch and Title III-C Elderly Nutrition Services programs, to those tailored to a local context, such as landscape analyses of two accountable communities of health in Washington state. As the deputy survey director of the Multi-City Sugar-Sweetened Beverage Tax Evaluation for the Robert Wood Johnson Foundation, Ms. Hu also developed procedures for in-person data collection and trained staff to collect store observation and shopper intercept survey data; these data laid the foundation for analyses of tax impacts in those communities.
Cindy Hu, lead data scientist	Cindy Hu (Sc.D., Risk and Decision Sciences, Harvard University) will advise on the quantitative aspects of Task 1 and Task 2. She has nine years of experience in applied public-health research with a focus on understanding the impact of primary interventions to improve population health through improved social determinants of health. At Mathematica, she applies her training to a wide range of projects in support of federal, state, local, and nongovernment clients. For the City of Oakland, she served as the quantitative task lead for the SSB tax evaluation services. She led the quantitative analysis to provide accountability for the investments in programs and services funded by the SSB tax and developed a data pipeline to create individual profiles for each grantee to reflect their service areas and activities. Dr. Hu has extensive experience leading quantitative tasks across projects, including a geospatial task for the Medi-Cal gap analysis to identify gaps in access to care among this vulnerable population, directing the Environmental Health Capacity project for the Massachusetts Department of Public Health, and leading the analytics work to translate wastewater data into public-health actions for the Rockefeller Foundation.
Cindy Alvarez, researcher	Cindy Alvarez (M.P.H., Health Policy, Yale University), will lead the assessment of grantee performance and outcomes evaluation planning. Ms. Alvarez has experience leading teams to conduct interviews, focus groups, literature reviews, and qualitative data analysis. Specifically, she served as the monitoring and evaluation task lead for Champions for School Health, a project funded by the National Association of School Nurses to increase vaccine access and vaccine confidence in underserved communities. For this role, she developed the data reporting template to evaluate grantee performance, supported focus groups and qualitative data analysis, and co-authored the final report of findings. She has also led interviews with community-based organizations, state and local health departments, pharmacists and pharmacy managers, and hospital staff for projects funded by the Blue Shield of California Foundation, the Assistant Secretary for Planning and Evaluation, and the California Health Care Foundation.
Quality assurance advisors	
Dana Petersen, senior researcher	Dana Petersen (Ph.D., Health Services and Policy Analysis, University of California, Berkeley) will serve as the quality assurance reviewer for the assessment of grantee performance and outcomes evaluation planning. In this role, she will review and comment on all products (including work plans, grantee summaries, and written program deliverables) to ensure that they satisfy the City of Oakland’s and other program stakeholders’ needs and meet Mathematica’s standard of excellence. She has more than 20 years of experience in planning, managing, and evaluating public health, health care, and social service programs and policies focusing on diverse low-income populations. She is recognized for her expertise in research design, data collection, and analysis. Dr. Petersen served as the quality assurance reviewer on our prior SSB tax evaluation for Oakland. She currently serves at the qualitative methods lead on the Children and Youth Behavioral Health Initiative, a multimethod study of efforts to transform the systems that support the behavioral health of all of California’s children, youth, and their families. In

This proposal contains proprietary data which may be used only for evaluation and award purposes.

Personnel name, title	Relevant qualifications
	<p>addition, she completed a study of business owners’ experiences implementing an SSB tax in Philadelphia and Oakland as part of the Multi-City Sugar-Sweetened Beverage Tax Evaluation for the Robert Wood Johnson Foundation in 2019. Dr. Petersen also led an assessment of the Action Plan to Reduce Racial and Ethnic Health Disparities, an initiative of the U.S. Department of Health and Human Services.</p>
Support staff	
<p>Gillian Giudice, data scientist</p>	<p>Gillian Giudice (B.A., Economics, Sociology, College of William and Mary) will provide quantitative data support for the assessment of grantee performance. She specializes in task automation, with expertise in reporting, visualization, and survey data collection and analysis. For the City of Oakland, she served as quantitative task support for the evaluation and research services for reducing consumption of SSB efforts. She supported development of individual profiles for grantees to reflect their service areas and activities. At Mathematica, Ms. Giudice has also calculated the cost of meeting proposed nurse–patient staffing ratios for the Massachusetts Nursing Association; assessed the feasibility of fielding a survey via email by analyzing the quality of more than 8 million email addresses provided in the Comprehensive Primary Care Patient Rosters; and automated production of a formatted survey codebook for the Disability and Rehabilitation Research Projects MY-CIL survey. In 2020, Gillian authored an issue brief about health-related quality of life and stress among spouses of Active Duty service members for the Health Care Surveys of DoD Beneficiaries contract. Before working at Mathematica, Ms. Giudice worked in community food systems, where she managed subsidized farmers markets, led youth programming, and worked as a bilingual nutrition educator at community centers and WIC offices in northern Illinois.</p>
<p>Carla Chavez, research analyst</p>	<p>Carla Chavez (M.P.H., University of Illinois Chicago) will help support data collection and analysis for the assessment of grantee performance. Her project work at Mathematica includes conducting focus groups and in-depth interviews to assess the workplace climate within sexual and domestic violence organizations. She also has experience conducting qualitative interviews with home-based providers for the Home-Based Child Care Supply and Quality project. Before joining Mathematica, she worked on a study funded by Bloomberg Philanthropies and Arnold Ventures Philanthropy collecting data from grocery stores and fast-food restaurants on product prices, availability, and marketing in Oakland and Sacramento as a part of the SSB Tax study at the University of Illinois Chicago.</p>
<p>Jade Christey, research associate</p>	<p>Jade Christey (B.A., Human Biology and Society, University of California, Los Angeles) will support data collection and analysis for the assessment of grantee performance. Before joining Mathematica, Ms. Christey worked as a research assistant for the evaluation of the California Tobacco Control Program: Priority Population Initiative; in that role, she conducted qualitative interviews, coded interview transcripts, and created memos. She also worked on the Incentives and Prevention Study, a project aiming to understand how to best use financial incentives for HIV prevention; in that role, she supported study recruitment and management.</p>

IV. Cost Proposal

A. Introduction

This section provides budget and supporting cost information for conducting Oakland Sugar Sweetened Beverage Tax Evaluation Services in response to the request issued by the City of Oakland.

Mathematica’s total bid for the proposal is \$249,983. This total includes the number of budgeted hours for individuals, the categories of labor, and the price of materials and supplies to perform the proposed work. We based the fixed unit prices used to estimate costs on prices set each calendar year. Mathematica assumes that we would be allowed to add new labor categories for any new staff to perform any work required for the project but whose qualifications do not fit under the existing labor categories. We also assume that during the course of the project, we would be allowed to move

Oakland Sugar Sweetened Beverage Tax Evaluation Services

any staff to higher labor categories if they meet these labor categories' qualifications. We assume that we will be reimbursed based on our fixed unit pricing. This bid is firm for a period of 60 days from the date of submission.

Any questions relating to this proposal should be addressed to:

Susan Boudreau Vice President, Legal and Contracts Strategy (609) 297-4536 rfpcenter@mathematica-mpr.com	or	Lisa Schwartz Senior Vice President (609) 945-3386 rfpcenter@mathematica-mpr.com
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Sending procurement-related emails to the RFP center assures prompt receipt and distribution of these materials. Please use this email address for all Mathematica locations, as it is checked frequently for new messages.

Part B of this section contains complete budget data for the proposal. Part C provides the budget narrative, including a description of labor and other direct costs.

B. Budget

		Task 1 Assess grantee performance	Task 2 Workplan	Total hours	Total Dollars
Subject Matter Expert II					
Mindy Hu	\$245.88	186	36	222	\$54,585
Dana Petersen	\$245.88	20	8	28	\$6,885
IT Subject Matter Expert II					
Cindy Hu	\$236.98	52	32	84	\$19,906
Subject Matter Expert I					
Cindy Alvarez	\$166.51	328	56	384	\$63,940
IT Analyst					
Gillian Giudice	\$141.68	190	0	190	\$26,919
Analyst					
Carla Chavez	\$128.84	260	0	260	\$33,498
Project Manager	\$128.84	4	1	5	\$644
Financial Project Analyst	\$128.84	4	1	5	\$644
Editor	\$128.84	28	5	33	\$4,252
Associate					
Jade Christey	\$97.44	340	16	356	\$34,689
Administrator					
Sr. Production Coordinator	\$127.82	16	2	18	\$2,301
SUBTOTAL - LOADED LABOR		\$217,820	\$30,443		\$248,263
Other Direct Costs					
Other Costs		\$1,200	\$0		\$1,200
Incentive And Respondent Payments		\$520	\$0		\$520
Total Compensation		\$219,540	\$30,443		\$249,983

C. Budget Narrative

1. Starting date

We have calculated costs assuming March 1, 2024 starting date, and a total contract period of 10 months.

2. Direct labor

We have budgeted the number of hours for individuals and categories of labor estimated to perform the proposed work. We based the fixed unit prices used to estimate costs on prices set each calendar year. We have prepared our budget estimate using fully aggregated unit pricing. We have added a salary increment to account for labor increases anticipated in response to Mathematica's annual salary review process, which occurs each March 1.

3. Other costs

Our budget includes the price of other materials and supplies that we will require to accomplish the work including IRB costs.

4. Incentives and respondent payments

We will provide \$25 incentives to each of the 20 interview participants.

References

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