



# AGENDA REPORT


**TO:** Jestin D. Johnson  
City Administrator

**FROM:** Joe DeVries  
Deputy City Administrator

**SUBJECT:** Mathematica Evaluation of SSBT  
Programs

**DATE:** November 3, 2023

City Administrator Approval

  
Jestin Johnson (Nov 30, 2023 22:00 PST)

Date: Nov 30, 2023

## **RECOMMENDATION**

**Staff Recommends That the City Council Adopt A Resolution Waiving the Competitive Request For Proposal/Qualification Process Requirements And The Local/Small Local Business Enterprise Program Requirements And Awarding A Professional Service Agreement To Mathematica, Inc. In An Amount Not To Exceed \$249,983 To Provide Sugar Sweetened Beverage Tax Evaluation Services**

## **EXECUTIVE SUMMARY**

Staff recommends that the City Council adopt a resolution authorizing the City Administrator to execute a contract with Mathematica to evaluate the Sugar Sweetened Beverage (SSB) Community Grants program. Mathematica previously carried out an extensive evaluation of the 2020-2022 grant cycle, providing insightful reports and engaging with the Community Advisory Board (Board) to address their inquiries. The purpose of this renewal is to maintain the continuity of our evaluation efforts and enable comparisons of grantee performance across different grant cycles.

## **BACKGROUND / LEGISLATIVE HISTORY**

The City of Oakland has been at the forefront of promoting public health and wellness by addressing the adverse effects of sugar-sweetened beverages. In November 2016, Oakland voters demonstrated their commitment to healthier lifestyles by approving Measure HH, a 1 cent per ounce tax on the distribution of sugary drinks.

Revenue generated from the SSB tax can be used for any lawful government purpose, and our City Council, recognizing the importance of reducing SSB consumption, allocated a portion of this revenue to support targeted programs aimed at reducing sugary beverage consumption.

In April 2018, in line with our dedication to fostering healthier choices and lifestyles, the City Council passed Resolution [87162 C.M.S.](#), authorizing the allocation of \$750,000 to fund marketing, community education, and evaluation services for the SSB Community Grants program.

Life Enrichment Committee  
December 12, 2023

On March 15, 2019, the Human Services Department released a Request for Qualifications (RFQ) for Professional Services, for which Mathematica submitted proposals in several service categories, including Service Category 3: Independent Evaluation of Program Services. Mathematica was deemed qualified to provide services in this category.

In October 2019, representatives from Mathematica were interviewed about their capacity to provide evaluation and/or research services for the City of Oakland's Reducing Consumption of Sugar Sweetened Beverages efforts. This interview was conducted by Sharon Robinson, a Planner in the Human Services Department, and Julia Liou, a member of the Sugar Sweetened Beverage Community Advisory Board. Based on the interests expressed in that meeting, Mathematica submitted a draft proposal in February 2020. After receiving feedback from Sharon and Julia, a revised proposal was submitted in August 2020. **(Attachment A)**

In June 2022, Mathematica submitted its evaluation of all of the recipients of Sugar Sweetened Beverage Tax funds. **(Attachment B)**. On July 11, 2022, they presented at the publicly accessible SSB Community Advisory Board meeting, where they answered questions and shared perspectives and challenges faced.

On June 23, 2022, the City Council adopted Resolution [89302 C.M.S.](#), awarding a grant agreements To 26 non-profit and public agencies to provide services until June 30, 2024 to address the impact and reduce consumption of Sugar Sweetened Beverages in a total amount not to exceed \$3,000,000 using Sugar-Sweetened Beverage Distribution Tax Revenue.

At their September 2023 monthly meeting, after reviewing a new proposal from Mathematica to evaluate the latest round of SSB grantee funding, the members of the Sugar Sweetened Beverage community advisory board unanimously voted to enlist Mathematica to evaluate the latest round of SSBT grant funding.

## **ANALYSIS AND POLICY ALTERNATIVES**

It is important to evaluate the funded community grantees to assess their efficiency and ensure they are using the funds as specified in their Scope of Work. It is also important to show accountability to the Oakland taxpayers. As Mathematica's previous contract has expired, we have thoroughly assessed the most effective approach to move forward.

The decision to waive competitive bidding for Mathematica in the SSB Community Grants evaluation stems from prioritizing the City's best interests and the evaluation process's effectiveness. Maintaining continuity in the evaluation process is crucial, and Mathematica's established familiarity with the program positions them uniquely to provide meaningful insights. This continuity allows for the evaluation of historical data trends, a critical aspect for assessing the long-term impact of the SSB Community Grants program on our community's health and well-being.

Conducting a new competitive bidding process would also be both time and labor-intensive. This might prevent the timely evaluations taking place within the grant timeline. By waiving the competitive requirements, the evaluation process can proceed swiftly and efficiently.

Mathematica has an office in Oakland, where they employ local residents and address localized issues, demonstrating that an understanding of our community's needs and challenges. However, being a national organization headquartered in Washington DC, they bring a level of resource capacity and expertise that local firms may not readily match.

The decision to waive the competitive requirements is a strategic choice made to leverage Mathematica's proven track record, maintain continuity, and achieve a robust and efficient evaluation process aligned with the unique needs and goals of the City of Oakland.

This proposed policy action advances key citywide priorities by fostering a safer and healthier community. It promotes **holistic community safety** through the promotion of healthier lifestyles and addressing health disparities. It contributes to **housing, economic, and cultural security** by fostering entrepreneurship and promoting economic resiliency in Oakland. Evaluation of SSB grantees also shows the City's dedication to **responsive, trustworthy government** by demonstrating a commitment to transparency and accountability.

### **SCOPE OF WORK**

With the full approval of the Board, Mathematica has presented a comprehensive plan for evaluating SSB grant recipients. **(Attachment C)**

Phase I will evaluate the performance of 26 grant recipients who have received Measure HH funding between July 2022 and June 2024, along with approximately five agencies that have received Measure HH funding separately from the community grants mechanism. This evaluation is designed to gauge how grant recipients have met their objectives, adhered to their plans, and served specific demographic groups. The result will be detailed profiles for each grant recipient and agency, ultimately culminating in an extensive report that highlights emerging trends and offers strategic recommendations.

Phase II includes developing a Theory of Change and crafting a roadmap that helps ensure their data collection and evaluation align with the City's goals and what the grant recipients aim to achieve. To make this theory robust and reliable, Mathematica will collaborate with experts familiar with the grant objectives. Through collaborative sessions with City of Oakland staff and Community Advisory Board members, this theory will take shape, genuinely reflecting the vision for future grant cycles.

In Phase III, Mathematica will work closely with the City to define precise research questions and relevant indicators, which serve as measurement tools, and develop a standardized set of these indicators. This standardization will enable the City to compare the performance of different grant recipients with similar objectives. This process will also lay the foundation for setting clear guidelines on how we evaluate and report on future grant requests.

These efforts will culminate in a comprehensive work plan tailored for the City. This plan will provide a detailed rationale for collecting specific data, a structured sequence of steps for data collection and analysis, and a proposed timeline for the integration of these indicators into regular reports from grant recipients. Additionally, it will outline the preparations required for the effective implementation of these indicators, including collecting input from grant recipients to ensure the feasibility of the process.

In summary, Mathematica's plan offers a clear and organized framework for collecting and analyzing data, allowing for a meaningful comparison of the performance of various grant recipients with similar goals. This will ensure that our evaluation process is rigorous and aligned with our goals while maintaining professionalism and efficiency.

### **COORDINATION**

The Sugar Sweetened Beverage Community Advisory Board actively engaged in this endeavor with their expertise and insights instrumental in crafting the Scope of Work, ensuring it resonated with the community's needs. The Board's input demonstrates an understanding of the local landscape and helped tailor the approach to best serve our community.

In addition, CAO staff maintained a close collaboration with the Human Services Department to allow us to reference the historical context of the RFQ process in 2019, which was the initial step in selecting Mathematica for this evaluation.

### **FISCAL IMPACT**

The proposed policy action involves entering into a contract with Mathematica for a comprehensive evaluation of Sugar Sweetened Beverage (SSB) grant programs. This initiative has a fiscal impact, with the total contract value amounting to \$249,983. The funding for this evaluation is sourced from Measure HH, underlining the financial commitment made by the City of Oakland to prioritize public health and community well-being.

<b>Fund</b>	<b>Org.</b>	<b>Project</b>	<b>Amount</b>
1030	02111	1004775	\$249,983

### **PUBLIC OUTREACH / INTEREST**

The SSB Community Grants program has garnered considerable public interest and support since its inception. It has been a collaborative effort with the active involvement of the Board and other stakeholders, who have contributed valuable perspectives and insights throughout the evaluation process. Engaging Mathematica aligns with the City's commitment to transparent and inclusive governance, incorporating community input into the decision-making process.

### **PAST PERFORMANCE, EVALUATION AND FOLLOW-UP**

During the previous grant cycle evaluation, Mathematica exhibited exceptional competence, professionalism, and a commitment to delivering insightful analysis. Their comprehensive report played a pivotal role in helping our City Council and stakeholders understand the program's strengths, weaknesses, and potential areas for improvement.

Through their in-depth evaluation, Mathematica showcased the program's positive impact on reducing SSB consumption within our community. Their findings not only informed policy decisions but also served as a catalyst for refining and enhancing the SSB Community Grants program.

### **SUSTAINABLE OPPORTUNITIES**

**Economic:** Mathematica has an office in Oakland that employs Oakland residents. Furthermore, several funded organizations promote entrepreneurship and economic resiliency in Oakland. Mathematica's evaluation allows us to determine which organizations can do this best.

**Environmental:** The SSB Community Grants program, supported by Mathematica's evaluation, aligns with Oakland's commitment to environmental sustainability. By encouraging the consumption of healthier alternatives to sugary beverages, we reduce the demand for single-use plastic bottles and packaging associated with the production and distribution of such beverages. This leads to decreased plastic waste and a positive impact on our local environment. The promotion of healthy lifestyles and proper nutrition improves the overall quality of life and safety in Oakland neighborhoods.

**Race & Equity:** Renewing the contract with Mathematica enables the City to continue evaluating the impact of the SSB Community Grants program on underserved communities. Their evaluation will help identify disparities in access to resources and opportunities, allowing us to design targeted interventions to address health inequalities.

Analyzing data across demographic lines ensures that the benefits of the SSB Community Grants program are distributed equitably, reaching those who need support the most. Furthermore, Mathematica's insights will enable us to identify potential barriers to participation and create a more inclusive program that empowers all community members.

### **ACTION REQUESTED OF THE CITY COUNCIL**

**Staff Recommends That the City Council Adopt A Resolution Waiving the Competitive Request For Proposal/Qualification Process Requirements And The Local/Small Local Business Enterprise Program Requirements And Awarding A Professional Service Agreement To Mathematica, Inc. In An Amount Not To Exceed \$249,983 To Provide Sugar Sweetened Beverage Tax Evaluation Services**

For questions regarding this report, please contact Michael Akanji, City Administrator Analyst, at 238-6454.

Respectfully submitted,



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JOE DEVRIES  
Deputy City Administrator

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Analyst

### **Attachments**

- Attachment A: Mathematica Proposal received in 2020
- Attachment B: Mathematica evaluation report of 2019 to 2021 SSB grant recipients
- Attachment C: Mathematica Proposal to evaluate 2022-24 SSB grant recipients