



DIVERSITY, EQUITY, AND INCLUSION CONSULTING SERVICES

REQUEST FOR PROPOSAL

Consultant Name: Roads Consulting Group

Principal place of business: 974 Bennington St, East Boston MA 02128.

Texas Office: 13105 Northwest Fwy, Houston, TX 77040.

Valid for not less than 180 days from the date of receipt.

Contact Information

Dr. Jose Perez, 781 346 4646, jose.perez@roadscg.com

Contact number

Office of the CEO/President: (857) 557- 5138

Authorized Signatory

Jose Perez

Print Name of Authorized Signatory

Date: **November 8th, 2023**

Responses should be addressed to:

Business Manager

Swampscott Town Hall

22 Monument Ave

Swampscott, MA 01907

BY: November 13th, 2023

Dear Town of Swampscott,

We appreciate your consideration of Roads Consulting Group for the Request for Proposals (RFP) related to your Diversity, Equity, and Inclusion (DEI) project. Over the years, we have consistently demonstrated our dedication to integrity, trust, and client confidentiality.

Located in Massachusetts, our team of expert consultants boasts a wealth of experience, specifically crafted to deliver significant advantages to our clients. Our specialization lies in aiding underprivileged communities as they seek guidance and support for their ambitious entrepreneurial ventures. We dedicate ourselves to these communities, possessing an intricate understanding of the Diversity, Equity, and Inclusion (DEI) landscape within the state of Massachusetts.

Our comprehensive range of services spans from nurturing startups to tackling intricate audit and legal compliance demands. At the core of our mission is the unwavering commitment to assist business owners and organizations in proficiently managing their workforce, expanding their footprint, and nurturing sustainable growth. As a certified Minority Business Enterprise (MBE), we have a profound understanding of the challenges faced by current business owners due to corporate and governmental disadvantages. For six years, we have been at the forefront of leading technical assistance efforts for small businesses in various states, including Rhode Island, Vermont, Washington State, Massachusetts, Ohio, and now, Texas.

Our expertise spans multiple domains, including accounting, marketing, human resources, operations, finance, legal support, compliance, sales, funding, taxation, and DEI support. Our diverse team of over 21 professionals is deeply passionate about their work and unwaveringly dedicated to assisting business owners while making a positive impact. We have expertise in understanding community concerns and brokering solutions that address the needs of the community as well as the challenges faced by municipalities governing with often limited resources and in challenging times, especially during the pandemic.

We take immense pride in our all-inclusive approach, which includes offering assistance in five languages: English, Spanish, Portuguese, French, and Korean. Our journey began in the technical assistance program of the City of Boston, with a primary focus on supporting minority and women-owned small businesses. Since then, we have expanded our reach through collaborations with non-profit organizations and institutions.

Roads Consulting Group is more than just a consulting firm; we are a family of talented professionals devoted to giving back to our communities. Our passion for success, empowerment of entrepreneurs, guidance for leaders, and promotion of innovation truly set us apart.

We are Roads Consulting Group, and we are committed to paving the road to success. We eagerly anticipate the opportunity to work with the Town of Swampscott on your DEI project, further empowering your community.

Sincerely,



Dr. Jose Perez - CEO/President/Founder
974 Bennington St, East Boston MA 02128
Phone: 781 346 464 / Fax: 857-557-5254
Email: jose.perez@roadscg.com

1. Plan of Service

In response to your Request for Proposals (RFP) and considering the provided background and scope, Roads Consulting Group is committed to delivering a comprehensive plan of service tailored to address the specific needs and objectives of the Town of Swampscott's Diversity, Equity, and Inclusion (DEI) initiative. Our plan is designed to promote inclusivity and diversity throughout the town, focusing on both the internal organization and external community engagement.

I. Methodology:

- Conduct a thorough review of all Town personnel and department policies to identify areas of improvement in alignment with best DEI practices.
- We will create the DEI plan informed by the focus groups and other data the Town provide.
- Administer at least two public surveys and one Town employee survey to gauge the current DEI climate.
- Facilitate multiple interactive focus groups to engage up to 400 Town employees, 50 elected and appointed officials, and community members. To ensure accessibility, these focus groups may be offered on different days and times to accommodate various schedules.

II. Reporting:

- Provide monthly updates to the Human Resources Director, ensuring ongoing communication and transparency.
- Deliver draft assessment and plan updates to the Town Administrator or designee.
- Present findings and recommendations to the Select Board in the form of draft and final assessment reports by the contract's end.

III. Assessment:

- Develop a final written assessment of professional quality, consisting of a comprehensive written report and a presentation to the Select Board by the contract's conclusion.

IV. Strategic Plan:

- Develop a strategic plan for the integration of DEI into the Town's internal processes, policies, and systems. This plan will include the following:
 - Targeted goals and an action plan with primary oversight responsibility for each action.
 - Estimated time frames for accomplishing each action.
 - Resources needed, including employees and associated costs.

V. Short-Term and Long-Term Plans:

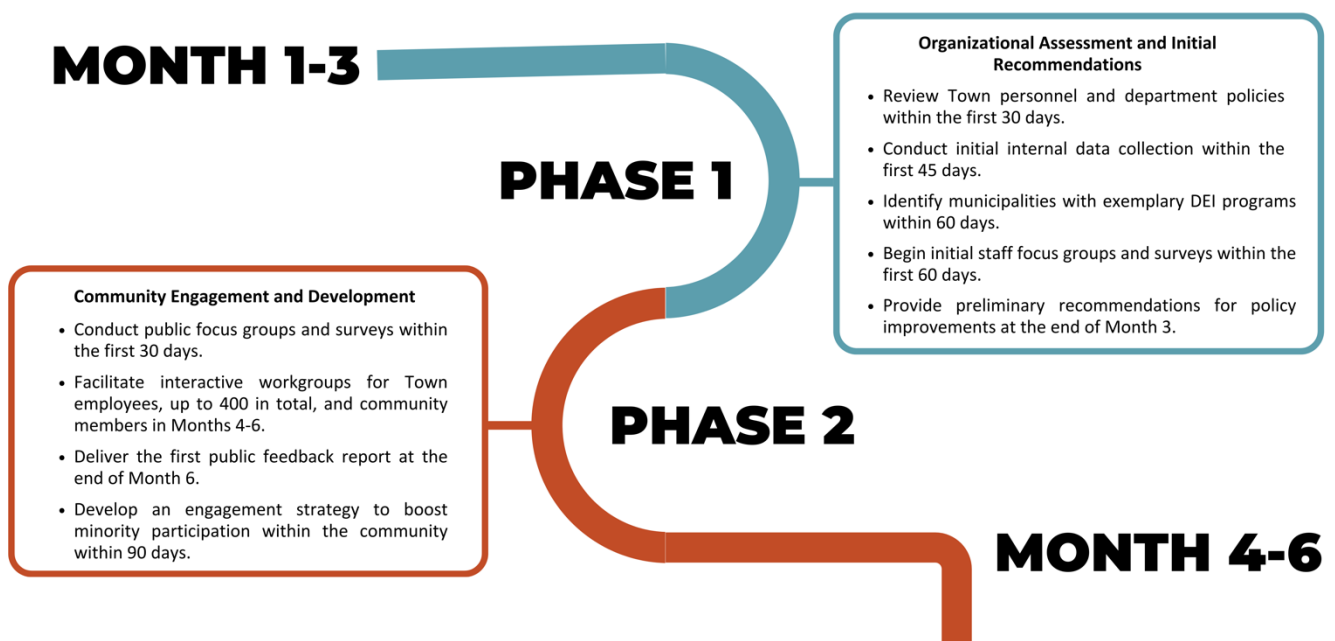
- Short-Term Plan (0-1 year): Develop goals and benchmarks that can be reasonably achieved within the first six months and one year.
- Long-Term Plan (1-5 years): Develop goals and benchmarks for a five-year period, ensuring lasting change and continuous improvement. Include methods for long-term monitoring and evaluation of success.

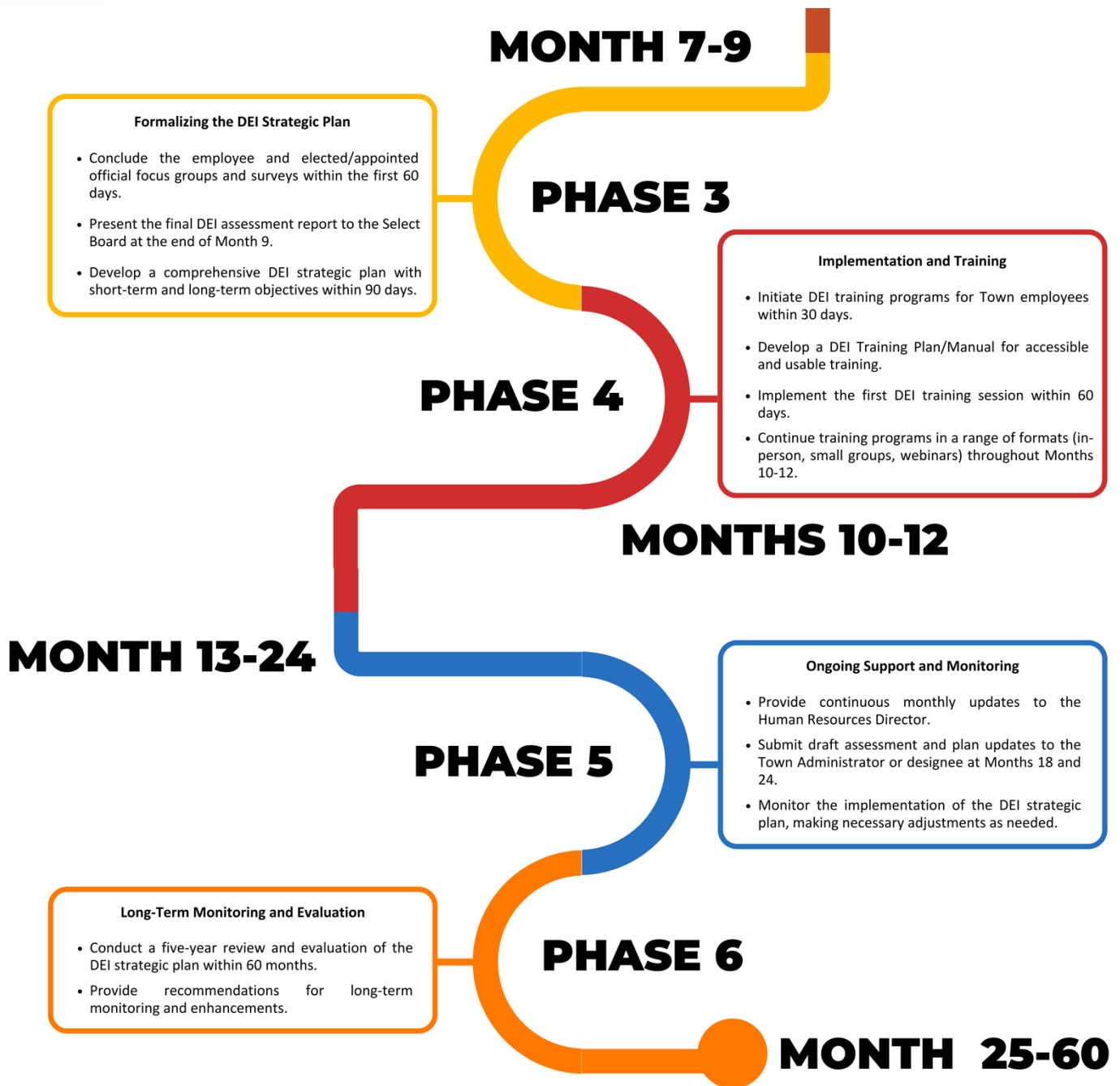
VI. Education & Training:

- Based on the assessment findings, develop a one-year plan for education and training for employees, elected and appointed officials.
- These trainings will address topics stemming from the organizational assessment and will be incorporated into the short-term plan.
- Ensure that the consultant provides or coordinates these trainings, covering employees at all levels and aligning with the goals and benchmarks in the roadmap.
- Utilize a variety of formats for training, including in-person sessions, small groups, lectures, webinars, and other formats that incorporate best practices.

VII. Timeline and Benchmarks:

In summary, Roads Consulting Group's Plan of Service is a comprehensive, tailored approach to address the Town of Swampscott's DEI needs. We are committed to promoting inclusivity, diversity, and equity within the town, both internally and within the broader community. Our plan includes a robust methodology, regular reporting, assessment, strategic planning, and a comprehensive education and training program, all geared towards achieving measurable benchmarks and fostering positive change. We look forward to partnering with the Town to implement this plan and drive meaningful improvements in DEI.





This Plan of Service ensures a systematic approach to address the Town's inclusivity concerns, create a comprehensive DEI strategic plan, and facilitate long-term improvements in diversity, equity, and inclusion, with defined timelines and measurable benchmarks for each phase.

VIII. Implementation Plan for DEI Staff Position in the Town of Swampscott

1. Job Description and Function:

- Develop a comprehensive job description for the DEI position, outlining responsibilities, qualifications, and key performance indicators.
- Define the core functions of the role, including oversight of DEI initiatives, policy development, and fostering an inclusive culture.

2. Salary Recommendation:

- Conduct a salary analysis to ensure competitive compensation aligned with industry standards and the significance of the DEI role.
- Consider factors such as experience, qualifications, and the critical nature of fostering diversity and inclusion within the Town.

3. Placement in Organizational Chart:

- Propose the integration of the DEI position within the Town's organizational structure, ensuring direct access to executive leadership.
- Suggest placement within the Human Resources department or as a direct report to a high-ranking official to emphasize the strategic importance of DEI efforts.

4. Interdepartmental Collaboration:

- Facilitate regular collaboration with other Town departments to integrate DEI initiatives seamlessly into existing workflows.
- Establish a working group comprising representatives from various departments to ensure cross-functional engagement.

5. Board and Community Interaction:

- Recommend regular reports and updates to the Select Board to maintain transparency and accountability.
- Facilitate collaboration with community organizations through workshops, forums, and outreach programs, ensuring alignment with community values.

6. Community Engagement Strategies:

- Develop a community engagement plan to foster a direct connection between the DEI position and the broader community.
- Establish partnerships with local organizations to amplify the impact of DEI initiatives on a town-wide scale.

7. Training Programs:

- Implement training programs for Town departments, boards, and community organizations to enhance awareness and understanding of DEI principles.
- Collaborate with existing training structures to integrate DEI components into ongoing professional development initiatives.

8. Feedback Mechanisms:

- Establish feedback mechanisms, such as regular surveys and town hall meetings, to gather input from employees, boards, and the community.
- Use feedback to adapt and enhance DEI strategies continually.

9. Performance Metrics:

- Develop key performance indicators (KPIs) to measure the success of the DEI initiatives.
- Regularly evaluate progress against these metrics and adjust strategies accordingly.

10. Continuous Improvement:

- Foster a culture of continuous improvement by conducting regular reviews, seeking external input, and staying informed about evolving best practices in DEI.

This implementation plan aims to create a structured and effective framework for the establishment of the DEI staff position within the Town of Swampscott, ensuring its seamless integration, effectiveness, and sustainability.

2. Experience & Resources

Firm Description

Roads Consulting Group Limited Liability Company (RCG) is a Massachusetts domestic LLC registered in 2017 under the Secretary of State under number 001287621. Roads Consulting Group Limited Liability Company's name was formally registered under the name ACREDO LLC. This name was changed on 10-30-2017. We are registered in the State of Texas under Road Consulting Group LLC file number: 805068783.

- Headquarters: 974 Bennington St, East Boston MA 02128
- Texas office: 13105 Northwest Fwy, Houston, TX 77040
- RCG's website: <https://roadscg.com>

RCG was founded after recognizing businesses' needs to strategically grow while still being profitable, productive, and technologically advanced. With over a decade of experience, RCG has consistently worked closely with business owners and entrepreneurs to address their complex business needs and enhance their organizational objectives. In addition to our extensive track record of providing strategic business solutions, RCG has established a formidable presence in the realm of Diversity, Equity, and Inclusion (DEI). We have consistently demonstrated our commitment to promoting DEI within organizations by assisting them in developing and implementing inclusive practices, supplier diversity programs, economic inclusion strategies, and comprehensive training initiatives. Faithfully following the vision of its founder, RCG has excelled in delivering consulting services to help clients become more efficient and effective by supporting their organization's strategy and design. RCG has recently started strengthening relationships abroad while remaining firmly rooted in the US.

Qualifications and Experience

Roads CG (RCG) takes immense pride in its track record of serving over 1,000 projects since its establishment in 2017. We are licensed to do business in the Commonwealth of Massachusetts, ensuring our commitment to compliance. Over the years, we have collaborated with existing Technical Assistance (TA) programs, extending support to multiple disadvantaged communities. Our extensive experience has fostered close partnerships with government agencies, including municipalities with union environments, aligning with the development and implementation of diversity, equity, and inclusion-centered strategies. We have actively participated in the successful launch of projects such as The American Rescue Plan Act, a vital initiative aimed at offering financial aid to small businesses, helping them navigate the challenges posed by the COVID-19 pandemic. Our experience in facilitating complex learning processes with small, medium, and large groups for more than six years ensures our ability to provide the necessary guidance for your project's success.

The ARPA funding project has presented us with significant opportunities to spearhead transformative endeavors in key regions, including the City of Chelsea, the City of Boston, and the State of Rhode Island. Our focus has been on providing technical assistance to small business owners and entrepreneurs, covering a wide spectrum of crucial aspects, including business strategy, efficient operations management, human resources optimization, and strategic recruitment. We excel in converting challenges into opportunities, crafting effective marketing and digital marketing strategies, and developing compelling branding materials. Our history of formulating robust business plans showcases our proficiency.

Our efforts also extend to facilitating positive stakeholder relationships, as our strong communication and interpersonal skills enable us to develop strong written and analytic documents. We are experienced in coaching executives and other leaders in an organization, ensuring that all voices are at the table. Our history includes navigating intricate business and IRS registration processes, obtaining minority certifications, integrating with Dun & Bradstreet (D&B), utilizing the System for Award Management (SAM), and acquiring Commercial and Government Entity (CAGE) codes. We are adept at preparing comprehensive loan and grant applications, devising sustainable funding strategies, implementing proficient bookkeeping practices, and mastering budgeting techniques, all of which are crucial elements in the success of your project. Moreover, we have provided support in financial statement reporting, conducting financial projection analyses, considering real estate aspects, acquiring licenses and permits, implementing essential tools and electronic systems, and ensuring adherence to legal and compliance frameworks.

Our collaboration with small entrepreneurs has resulted in tangible outcomes, including enhanced income and the achievement of business goals within their respective environments. The positive impacts we've delivered are reflected in the comprehensive reports submitted to each responsible government entity. Our experience working with public agencies at various stages in strategic plan development assures you that we are well-equipped to meet your project's needs. At RCG, our passion for fostering diversity, equity, and inclusion makes us an ideal partner for your upcoming initiative. Please find below some of our experience:



In 2021 Roads partnered with the **City of Chelsea**, where we are currently leading a Technical Assistance program providing support to hundreds of businesses to recover from the impact, they had due the COVID. Within this initiative, we were providing technical assistance in different areas such as marketing, financial planning, business strategy, minority certifications, website development, EIDL loans, PPP forgiveness, and local and national grants. To date, we have been able to help hundreds of businesses with the efforts and participation of our dedicated team. We named this program Chelsea Strong and have renewed our contract with the city to continue our TA program.

SBS is a coalition where Roads was able to join a network of organizations with the common goal of assisting Massachusetts businesses that were/are struggling with economic hardship due to the pandemic. This assistance included PPP1 and PPP2 (Payroll Protection Plan) application assistance, PPP1 and PPP2 loan forgiveness, Restaurant Rehabilitation Fund application, municipal grants, ERC credit, CERTS Grant application, Shutter Venue Grant application, SBA EIDL loan application and 1:1 sessions in strategy, marketing, human resources, among others. Roads has been able to join the coalition of business advisors in Massachusetts and service more than 7,000 businesses that were/are in desperate need of help.

**SMALL
BUSINESS
STRONG**



During our partnership with the **Chelsea Business Foundation**, Roads connected with over 55 minority and female-owned and operated businesses with local institutions to create additional revenue streams. We utilized our connections with the procurement office of Encore Casino and Resort, to create new business relationships with this corporation and the local Latino business community. Roads also created a marketing campaign to encourage Encore team members to visit these businesses. We assisted selected businesses by providing educational webinars, workshops, and individual coaching. We assisted businesses in creating individual capability statements, digital presentations, repositioning their brands, and reviewing overall business health.

Roads and the Office of Economic Opportunity in **Providence**, Rhode Island created the technical assistance program in 2022. We created the landing page that served as an intake form for interested business owners, as well as marketing campaigns to access and spread awareness to the minority and disadvantaged small business community within Providence. We worked in tandem with local organizations and municipalities for outreach about this program. Our focus was on digital marketing technical assistance, inclusive of building websites and branding, as well as business strategy, operations, and HR-related coaching. The goal was to reach the underserved businesses that have been most affected by **COVID-19** and provide lasting assistance to help the local economy prosper.



We were selected as the firm authorized to provide technical assistance in the project to revitalize small businesses located on Broadway in the **City of Revere**. This project aimed to support more than 40 businesses in strategies to enhance the growth, sales, and operational structure of these companies. We finished this project last year. For 2023, we were awarded to provide assistance to start-ups so they can create a business plan that is realistic and will give them the possibility to create a successful business.

Roads CG recently achieved a significant milestone by securing the Equity Workforce Planning and Capacity Grant from **MassCEC**. We applied for this grant because we firmly believe in supporting the employment and career advancement of individuals from disadvantaged backgrounds in the clean energy sector. We are committed to reducing disparities and were awarded a Capacity Building grant to establish a coalition in Massachusetts. Our goal is to secure a 1 million dollar implementation grant in the next phase.



For **Emerald Cities** Collaborative (ECC), Roads had multiple workshops with different small businesses, especially with minority-owned businesses. We walked them through different workshops about capability statements and how to utilize them to their advantage, leadership & growth, value proposition, and growth capital strategies. In addition to this, we conducted one-on-one sessions to review their capabilities statements and make an assessment of their companies in different aspects like operations, human resources, marketing, strategy, compliance, and finance to advise where they can do things differently to grow the companies profitably. Once they complete their capability statement drafts, our design team converts those into a final piece. This program was carried out during the spring and fall of 2022 and fall of 2023. During the workshops, small business owners had the opportunity to break out into groups to discuss the questions and come back to share ideas with the whole group. All of the sessions were held online and reports from the 1:1 sessions were submitted to ECC and to the small business owner.

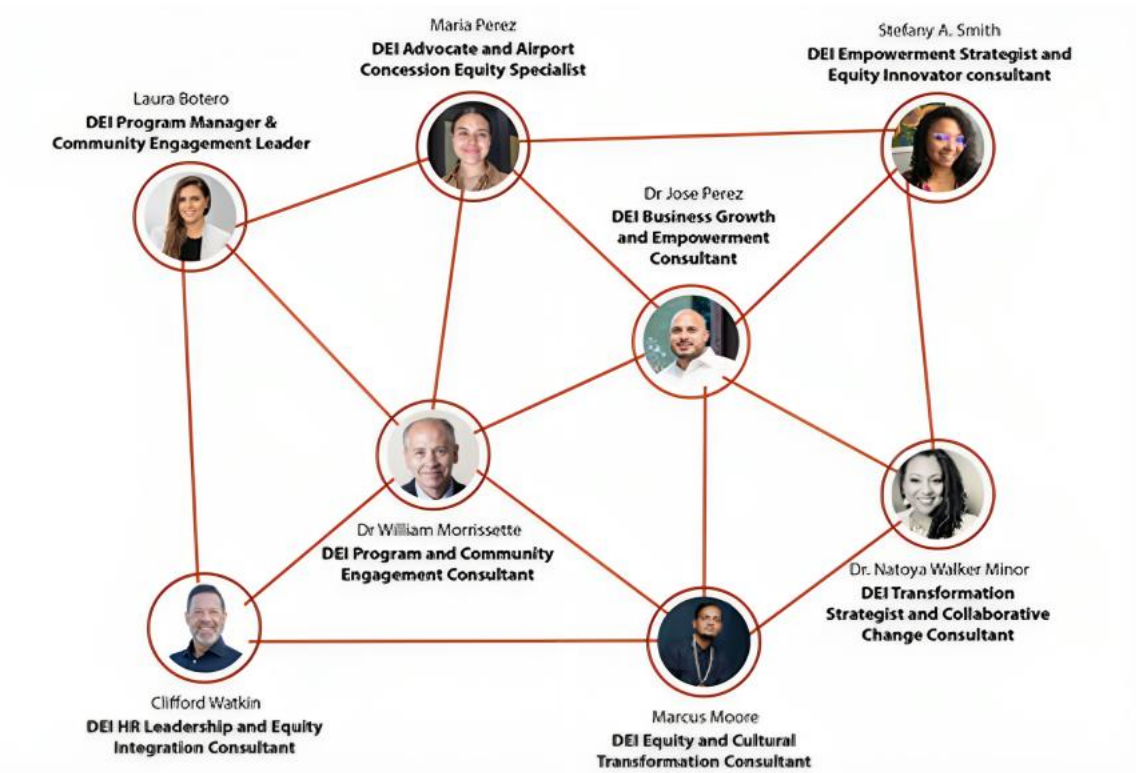
Initiative for a **Competitive Inner City** (ICIC) and Roads CG partnered to deliver a webinar to disadvantage-owned businesses on How to turn their disadvantages into advantages. Many set-aside opportunities are available for veteran, black-owned, women-owned, and minority-owned businesses and through this online webinar, Dr. Perez shared his experience in how to take those opportunities as advantages for their businesses. Even though this was a one-time event, was the beginning of a series of workshops and seminars around the New England area, especially with E For All, Harvard University, and DreamerES (Soñadores Latinos).



Personnel Qualifications and Experience

At Roads CG, our primary aim is to serve as your trusted guide on the path to transformation, wherein the embrace of diversity transcends mere choice to become your strategic cornerstone for achieving success. Our mission is to empower organizations, employees, and communities, in crafting workplaces that reverently acknowledge the distinctive identities of each individual. We firmly believe that authentic innovation and sustainable growth thrive within inclusive environments where every voice is not only heard but also cherished, and where respect for each person's unique perspective is paramount.

Meet our DEI Team



The following principals and associates from our firm will be involved in providing services to the Town, and they bring extensive experience and expertise in their respective areas:

- Dr. Jose Pérez: Business Operations and Entrepreneurship
- Dr. William Morrisette: Management and Strategy
- Dr. Natoya Walker Minor: Diversity, Equity, and Inclusion Leadership
- Clifford Watkin: HR Strategy and Diversity & Inclusion
- María Perez: Diversity & Inclusion Advocacy
- Stefanie A. Smith: Diversity, Equity, Inclusion, and Belonging Strategy
- Laura Botero: Program Management and Gender Equity
- Marcus Moore: Racial Equity and Facilitation

Jose Perez

Dr. Jose Perez is an experienced entrepreneur with over 15 years of experience in business creation and strategy. Currently the co-owner of DPV Transportation a worldwide chauffeured service company with more than 250 employees and four offices in the US. Dr. Perez has been awarded over 100 million dollars in corporate bids, opened support offices in Medellin, Colombia, gotten the award for best places to work with the Boston Globe for 2 years in a row in 2020 & 2021, and has been awarded twice for grants in workforce development to support his staff and create more roles. Dr. Perez is the founder of Roads Consulting Group a Business Strategy consulting minority-owned firm that specializes in disadvantaged communities and small businesses. Through his firm, he has been able to help hundreds of businesses in beating the gap of inequality. Today, Jose oversees a few personal businesses/ investments and a non-profit called We Reach that focuses on Workforce Training development to train people from disadvantaged communities so they can have better jobs and better income. Dr. Perez is a devoted member of the community who truly enjoys helping business owners achieve their path to success. To see Jose's resume please see Appendix: Resumes Team.

William Morrisette

Dr. William Morrisette, formerly Dean at Bay State College, a distinguished professor in the Criminal Justice sector, grant writer, and co-founder of We Reach, serves as a pivotal asset within RCG. In his role as DEI (Diversity, Equity, and Inclusion) and Proposal Senior Consultant, Dr. Morrisette's extensive academic background, including a Ph.D. in Philosophy, along with over two decades of experience in both for-profit and non-profit organizations, equips him to assist individuals and organizations in navigating complex challenges and implementing effective solutions. His multifaceted expertise, rooted in a commitment to critical thinking and real-world acumen, underscores his proficiency in DEI strategies and the development of compelling proposals. With Dr. Morrisette's leadership, RCG excels in providing holistic guidance, addressing specific client needs, and facilitating transformative change across academic and professional landscapes. To see William's resume please see Appendix: Resumes Team.

Clifford Watkin

Mr. Watkin is a subject matter expert on human resources for the Boston Business Journal and Employee Benefits News. Clifford is also an adjunct faculty member in Human Resources for Salem State University and an SHRM certification instructor at North Shore Community College. Clifford has created comprehensive employee acquisition and retention strategies for private sector employers, diversity, and inclusion, professional services firms, and non-profit organizations. His work covers the gamut of HR issues including legal compliance, performance management, onboarding, and creating effective corporate cultures. To see Clifford's resume please see Appendix: Resumes Team.

María Perez

Maria Perez stands as a catalyst for change, bringing a unique background in Psychology and Neuroscience to the forefront of her endeavors. As a dedicated advocate for diversity, equity, and inclusion (DEI) principles, Maria has played a pivotal role as an overseer of the Harris County Technical Assistance program. Leveraging her DBE/ACDBE certification, she champions equitable opportunities and nurtures underrepresented talents within the business development landscape. Maria's commitment to fostering inclusivity extends beyond rhetoric, as she actively engages in initiatives that drive lasting positive change. Her strategic approach and

insightful leadership make her a formidable force in advancing DEI principles and creating meaningful impact within communities and organizations alike.

Dr. Natoya Walker Minor

Dr. Natoya Walker Minor is an esteemed executive leader, renowned for her adept navigation through change and her commitment to fostering community collaborations. Currently serving as the Deputy General Manager at The Greater Cleveland Regional Transit Authority, she passionately drives initiatives related to diversity, equity, and inclusion (DEI). With a Ph.D. in executive leadership and a wealth of executive certificates, Natoya brings a high level of expertise to her endeavors. She firmly believes that diverse companies are well-positioned to seize contract opportunities and is dedicated to ushering in positive change through strategic leadership and inclusive practices.

Stefanie A. Smith

Stefanie A. Smith stands as a seasoned Diversity Practitioner, recognized for her exemplary work as the founder of Smith Squared and Associates. Armed with a combination of academic expertise and real-world success, Stefanie brings a wealth of knowledge to the forefront, offering comprehensive services in Diversity, Equity, Inclusion, and Belonging strategies. Her strategic acumen and dedication to fostering inclusive environments have made her a respected figure in the field. Stefanie's innovative approaches go beyond conventional solutions, creating tailored strategies that not only meet but exceed the evolving needs of organizations. With a commitment to driving meaningful change, Stefanie A. Smith continues to be a trailblazer in shaping diverse, equitable, and inclusive workplaces.

Laura Botero

Laura Botero is a seasoned program manager with an impressive track record, boasting 8 years of extensive experience in higher education and international education management. Her professional journey has been marked by a strong focus on gender equity and inclusion, reflecting her commitment to creating positive and impactful change. Laura excels in developing successful programs through her mastery of effective stakeholder engagement and adept relationship building. Her skills and passion converge to make her a valuable asset in driving meaningful initiatives and fostering inclusive environments.

Marcus Moore

Marcus Moore is a passionate activist and highly skilled facilitator dedicated to accelerating racial equity. Through engaging presentations and innovative partnerships, Marcus ignites transformative change that resonates deeply across corporations and districts. His multifaceted approach addresses systemic complexities, breaking down barriers and fostering inclusive environments. Marcus's unwavering commitment and unique perspective position him as a leader in the pursuit of racial equity, shaping narratives that drive impactful change and envision a future where equity is not just an aspiration but a tangible reality.

DEI Assessments and Training

Roads Consulting Group is committed to supporting the Town of Swampscott in enhancing Diversity, Equity, and Inclusion (DEI) through a comprehensive assessment and training program tailored to the Town's unique needs and objectives. Our approach will encompass several key components:



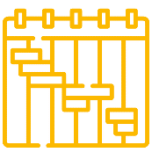
Organizational Assessment: We will begin by conducting a thorough DEI assessment of the Town's current practices, policies, and culture. This assessment will involve reviewing existing data, policies, and practices, as well as conducting interviews and surveys with employees and community members. The goal is to identify areas where improvements can be made to promote diversity and inclusivity.



Customized DEI Training: Based on the findings of the assessment, we will design and deliver a series of customized DEI training programs. These programs will be specifically tailored to address the identified needs and challenges within the Town of Swampscott. Training topics may include implicit bias awareness, cultural competency, inclusive leadership, and effective communication in a diverse workplace.



Community Engagement: In addition to employee training, we will develop community-focused DEI initiatives to engage and educate the broader population. This may involve hosting community forums, workshops, or outreach programs to promote understanding and collaboration among residents.



Strategic Plan Integration: The insights gained from the DEI assessment will be integrated into the broader DEI strategic plan. Roads Consulting Group will work closely with the Town to ensure that the assessment's findings inform the long-term roadmap for advancing diversity, equity, and inclusion within the organization.



Monitoring and Evaluation: We will implement a system for ongoing monitoring and evaluation to measure the effectiveness of the training and the impact on the Town's DEI efforts. This will involve regular check-ins, feedback collection, and adjustments to the training and initiatives as needed.



Resource Development: Our team will develop and provide educational resources to reinforce the training and educational efforts, ensuring that the principles of diversity and inclusion become embedded in the Town's culture.

Roads Consulting Group is dedicated to empowering the Town of Swampscott to foster a more diverse, equitable, and inclusive environment for both its employees and the community it serves. We look forward to collaborating closely with the Town to develop and implement these initiatives successfully.

Conflict of Interest

Our firm operates with integrity, and we are committed to avoiding conflicts of interest. There are no conflicts of interest arising from our business activities, ventures, or affiliations.

Multi-lingual Skills

We have multi-lingual team members available to assist with communication in various languages, including English, Spanish, Portuguese, French, and Korean.

Deliverables:

Deliverables will be tied to the measurable benchmarks and will include:

- Policy recommendations.
- DEI assessment reports.
- DEI strategic plan with short-term and long-term goals.
- Training programs.
- Ongoing updates and support.

Webinars, and Workshops for municipalities

Roads also conduct virtual and in-person tutorials, workshops, and training sessions through our programs with the municipalities, especially with the City of Chelsea, the City of Revere, and Washington State. We have hosted webinars revolving around topics such as human resource programs, digital marketing, business consulting, business finance, and more. We provide interactive workshops, teaching business owners through a series of interactive exercises, case studies, and theory, holistic methods of business management, operation, and growth. In these workshops, we have had speakers from our staff as well as guest speakers who are masters in their fields. These webinars/seminars have been provided in English and Spanish depending on the demographics of the municipalities to which these workshops have been directed. Some links for the Washington Cannabis Program can be found below. Scan the QR code to see more videos:



Our expertise extends beyond workshop content and delivery; we excel in outreach and program management as well. Our comprehensive approach encompasses every facet, from the initial phase of spreading awareness among small businesses to the meticulous management of program activities. In our endeavor to reach out to small businesses and encourage their participation in our programs, we employ a multifaceted strategy. This encompasses the entire spectrum, beginning with raising awareness about the program, streamlining the intake process, scheduling workshops, confirming participation, and collecting invaluable feedback.

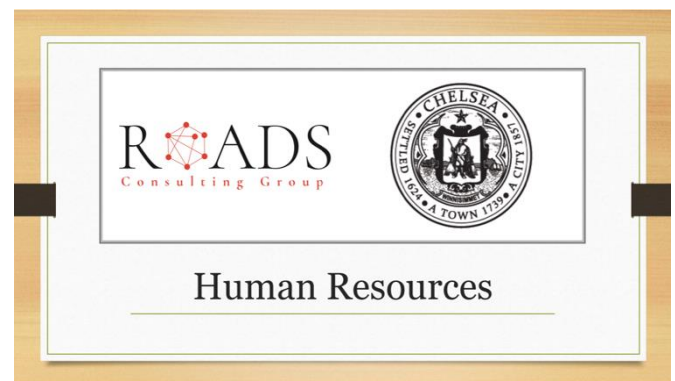
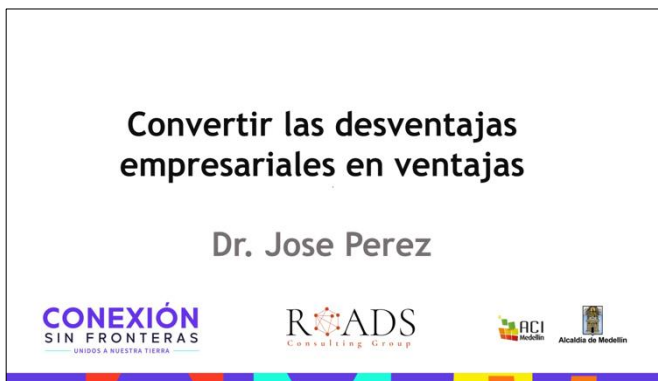
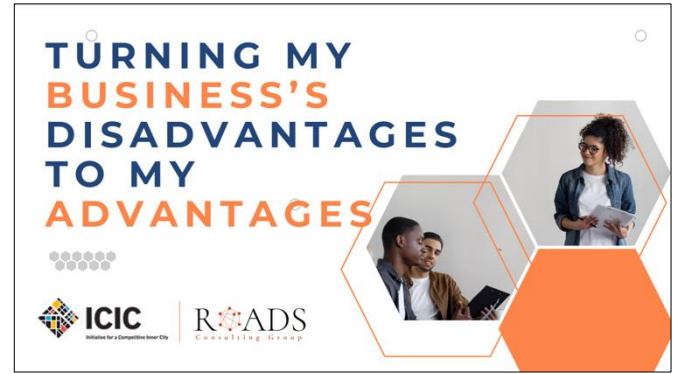
One illustration of our impactful outreach efforts involves our strategic partnerships with local news and television outlets. These collaborations have yielded remarkable results, particularly in generating interest and engagement from small businesses. By featuring our programs and activities in prominent media outlets, we have been able to garner significant attention and participation. An example of this success can be found in our partnership with the City of Chelsea for the Chelsea Strong Program. In this partnership, we witnessed a substantial surge in interest, particularly within the vibrant Latin community, after being prominently featured in news outlets. This robust media presence not only amplified awareness of the program but also instilled a sense of trust and credibility within the community. As a result, we observed a marked increase in applications from local Latino businesses seeking assistance and guidance.

Our commitment to effective outreach and program management underscores our dedication to creating impactful, inclusive, and accessible initiatives that empower small businesses and facilitate their growth and success.



SCAN TO SEE THE INTERVIEW

Presentation material samples



SCAN TO SEE OUR
PRESENTATIONS COMPLETE.

Documents and reports

We believe that actions speak louder than words, so we would like to provide you with a tangible example of our work. We are including a sample progress report for one of our clients. However, it can be customized according to the needs of the program.

This report serves as an illustrative representation of the comprehensive and detailed updates we provide to our clients. To see the full report scan here:



**SCAN TO SEE MORE
MORE REPORTS**

PROJECT OVERVIEW

One Providence is a small business and microenterprise assistance program designed to help Providence business owners expand their business knowledge, build their existing businesses and grow their markets.

LOOKING TO GROW YOUR SMALL BUSINESS? CONTACT US TODAY!

Register today for a new small business assistance program designed to help Providence business owners expand their business knowledge, build their existing businesses and grow their markets.

This is a **FREE** technical assistance program for small business owners from the City of Providence in partnership with Roads Consulting Group.

Areas of Support:

- Loan Applications
- Human Resources Support
- Legal Services
- Technology and IT
- Social Media and Marketing
- Licensing and Permitting
- Accounting and Finance
- Graphic Design

If you're a small business owner in Providence, register today for FREE!

For assistance, contact Jessie Ernster, City of Providence Small Business Coordinator, at jernster@providenceci.gov or 401-316-7696.

www.roadscg.com/providence

Appendix

Reference sheet

Daniela Fairchild

Director of Operations & Special Projects
Rhode Island Commerce Corporation

315 Iron Horse Way, Suite 101,
Providence, RI 02908

4012789187

CommerceRI.com VisitRhodeIsland.com



Alexander Train

He/him/his
AICP | Director
Department of Housing and
Community Development

500 Broadway, Room 101, Chelsea, MA 02150

Office: 6174664192 | Cell: 8572343791

atrain@chelseama.gov



Julie DeMauro

Transportation
Manager City of Revere

281 Broadway, Mezzanine Level, Revere,
MA

(781) 286-8174

jdemauro@revere.org



Matthew McGarrity

Senior Buyer
Harris County Purchasing

713-274-8704

matthew.mcgarrity@pur.hctx.net



Emily Patrick

She/her/hers
Senior Neighborhood Business
Manager, Small Business
Mayor's Office of Economic Opportunity
and Inclusion, City of Boston.

617-869-1622 (call or text)

emily.patrick@boston.gov

CITY of BOSTON

Doug Ling

Small Business Strong
Manager Boston LISC

617-504-8882

dling@lisc.org

www.smallbstrong.com

**SMALL
BUSINESS
STRONG**

Alexis Washburn

She/Her
Northeast Regional Director
Emerald Cities Collaborative
(ECC)

awashburn@emeraldcities.org



Alia Forrest

Cannabis Business Manager - Cannabis
Equity Program Mayor's Office of Economic
Opportunity & Inclusion
City of Boston Cannabis

617-635-2753

alia.forrest@boston.gov

CITY of BOSTON

Kadeem Leslie

He/Him/His
Deputy Director of Economic Opportunity
Office of Economic Opportunity
City of Providence

444 Westminster Street, Providence, RI 02908

(401) 680-8580

kleslie@providenceri.gov



Darell Byers

Senior Manager, Learning
& Development Interise

617-350-6301

dbyers@interise.org

INTERISE

Randall Szott

Economic Development Specialist
Partner Program Liaison.
VT Agency of Commerce and Community
Development

802-622-4257

randall.szott@vermont.gov



Marisa Lopez

Harvard Ed Portal Associate Director of
Workforce & Economic Development
Harvard Public Affairs and
Communications

224 Western Avenue, Allston, MA 02134

(339) 368-0474

marisa_lopez@harvard.edu



Elijah Moon

EWashington State Department of
Commerce

(206) 256-6113

elijah.moon@commerce.wa.gov



Minority Certifications



City of Boston
Economic Opportunity
and Inclusion

April 7, 2023

Mr. Jose Perez
Roads Consulting Group
974 Bennington Street
Boston, MA 02128

Dear Mr. Perez,

The City of Boston's Supplier Diversity Program is pleased to inform you that, as of **April 7, 2023**, **Roads Consulting Group** has been certified as a **Minority Business Enterprise (MBE)** under the business description of **Consulting firm that provides support in the areas of Digital Marketing, Business Strategy, Human Resources, Bookkeeping, Web Development, and Technical Assistance**. Small and local businesses are the lifeblood of Boston's vibrant economy -- we are delighted for this opportunity to partner with you.

Roads Consulting Group will be listed in the [City of Boston SLBE/MWBE Directory](#), which is available on-line. The Directory is used by general contractors, City departments, and various organizations, which are interested in utilizing small, small local, minority owned and woman owned vendors.

We also encourage you to utilize the City of Boston's Online Supplier Portal www.cityofboston.gov/procurement. On the Supplier Portal you can apply for a City of Boston vendor I.D. number, and also sign up for automatic email notifications of future bid opportunities in any categories of your choice. For detailed instructions on how to apply, please visit <https://www.boston.gov/departments/procurement/help-supplier-portal> or email vendor.questions@boston.gov.

Your certification renewal date is April 6, 2026.

Roads Consulting Group will be sent notification from the Supplier Diversity Program at least once every three years requesting an information update.

You will be required to submit the company's most recent **Tax Returns (all schedules, including Form 1120 or 1120S for corporations; Form 1040 and Schedule C for sole proprietorships; and Form 1065 for partnerships)**, and **information on any changes in the company's legal structure, ownership or control**.

ONE CITY HALL SQUARE | BOSTON, MA 02201 | BOSTON.GOV



City of Boston
Economic Opportunity
and Inclusion

Congratulations on your successful certification with the City of Boston. We look forward to working with you, and please let me know if I can assist you in any way possible.

Sincerely,

Stacey R. Williams

Stacey R. Williams

Certification Manager

stacey.williams@boston.gov, (617) 635-3720

Note: The continuation of your company's certification is contingent upon its compliance with the City of Boston's Certification Regulations. Pursuant to the Certification Regulations, the Supplier Diversity Program reserves the right to periodically monitor, review, and investigate any of its certified companies. Within thirty days of any change in the information contained in the original application, you must notify the Supplier Diversity Program of such change, and if such change is a material change which warrants further review, the Business Certification staff will notify you. If you would like to expand the scope of services your company is certified to perform, please submit a written request along with a list of work performed in that area of service and business references.

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THE COMMONWEALTH OF MASSACHUSETTS
Executive Office for Administration and Finance
SUPPLIER DIVERSITY OFFICE

One Ashburton Place, Suite 1017
Boston, MA 02108-1552
Charles D. Baker
Governor
Karyn E. Polito
Lieutenant Governor
Michael J. Heffernan
Secretary
William M. McAvoy
Executive Director

June 17, 2022

Ms. Andrea Perez
Roads Consulting Group, LLC
974 Bennington Street
Boston, MA 02128

Dear Ms. Perez:

Congratulations! Your firm has been certified as a minority business enterprise (MBE) with the Supplier Diversity Office ('SDO') under the business description of PROVIDER OF HUMAN RESOURCES AND MARKETING CONSULTANT SERVICES. Your firm will be listed in the SDO Certified Business Directory and the Massachusetts Central Register under this description. **This letter serves as the sole proof of your SDO certification.** Your designation as a MBE is valid for three (3) years unless revoked pursuant to 425 CMR 2.00.

Your firm's next renewal date is June 16, 2025. SDO will send written renewal notices to your business and/or e-mail address on file approximately thirty (30) business days prior to your firm's three (3) year certification anniversary. Additionally, every six (6) years, certified companies that wish to remain certified may undergo a substantive review which will require certain updated supporting documentation.

SDO also reserves the right to monitor your firm and to perform random spot checks to ensure the firm continues to meet the certification criteria. Your firm is required to notify the SDO in writing of any material changes. Examples include but are not limited to changes in its business description, as well as business phone number, fax number, business' physical location, webpage and e-mail addresses. Other reportable changes include business structure, ownership (the business is sold or transferred), control and outside employment. You also have a duty to report decertification and debarment notices from this or any other jurisdiction. Failure to abide by the continuing duty requirements shall constitute grounds for the firm's decertification.

We look forward to working with you and your firm to maximize its business opportunities. Should you have any questions, please feel free to contact us via email at webmaster.sdo@mass.gov.

Sincerely,



William M. McAvoy
Executive Director

THIS CERTIFIES THAT		
Roads Consulting Group		
* Nationally certified by the: GREATER NEW ENGLAND MINORITY SUPPLIER DEVELOPMENT COUNCIL		
*NAICS Code(s): 541611		
* Description of their product/services as defined by the North American Industry Classification System (NAICS)		
01/30/2023		GN10818
Issued Date		Certificate Number
03/31/2024	 Ying McGuire NMSDC CEO and President	 Peter F. Hurst, Jr., President and CEO
Expiration Date		
By using your password (NMSDC issued only), authorized users may log into NMSDC Central to view the entire profile: http://nmsdc.org		
Certify. Develop. Connect. Advocate.		
* MBEs certified by an Affiliate of the National Minority Supplier Development Council, Inc.®		