



## REQUEST FOR PROPOSALS (RFP)



### Consulting: Home Visiting Coordination Planning RFP #2122-05

#### *Our Vision*

*Children in Sonoma County from the prenatal stage to age five will develop to their fullest potential.*

#### *Our Mission*

*The mission of First 5 Sonoma County is to maximize the healthy development of all Sonoma County children from the prenatal stage through age five through support, education, and advocacy.*

**PROPOSALS DUE:  
Friday June 4, 5:00 PM PST**

*NOTE: Due to COVID-19 restrictions, proposals in response to this RFP must be submitted to the Commission electronically in the electronic format described in this RFP by the submission deadline. No hand deliveries will be accepted.*

**TIMELINE**  
**Consulting: Home Visiting Coordination Planning**  
RFP #2122-05

**IMPORTANT NOTE: Items in yellow boxes are DEADLINES. Proposers who fail to meet these requirements will not be considered for funding.**

\*All dates are subject to change at First 5 Sonoma County’s discretion. Notice of any date changes will be posted on the [First 5 Sonoma County website](#)

Date/Time	Event	Virtual Location
Friday May 14, 2021	Request for Proposals (RFP) RELEASED	<a href="https://first5sonomacounty.org/funding-opportunities/">https://first5sonomacounty.org/funding-opportunities/</a>  *Use informational videos to help you create a profile, and then click “Apply” from your home page.
Wednesday May 19, 2021 3:00 pm	DEADLINE to submit Proposer questions regarding the RFP	Submit questions regarding this RFP to <a href="mailto:funding@first5sonomacounty.org">funding@first5sonomacounty.org</a>
Friday May 21, 2021 3:00 pm	Answers to Questions regarding the RFP POSTED	<a href="https://first5sonomacounty.org/funding-opportunities/">https://first5sonomacounty.org/funding-opportunities/</a>
Friday June 4, 2021 5:00 pm	DEADLINE to submit Proposals (electronic submission ONLY)	Application access will be granted after acceptance of the LOI
June 2021	Proposal Review	N/A
June 18, 2021	Proposers notified of the Proposal Review Recommendations	Via email to proposers
Monday June 28, 2021 3:30 pm	Recommendations presented to First 5 Sonoma County Commission	TBD
On or about July 1, 2021	Contract(s) Executed	N/A

## I. Introduction to First 5 Sonoma County

First 5 Sonoma County is a public entity created by the passage of Proposition 10 in 1998 to help fund programs and services that support the optimal early development of children age 0-5. First 5 Sonoma County helps young children grow up healthy and ready to learn during the most important time in their development. First 5 Sonoma County has two decades of experience funding programs and advocating for policies that produce better futures for Sonoma County's children. The 2021-2025 First 5 Sonoma County Strategic Plan was recently adopted by the First 5 Sonoma County Commission and can be found [here](#).

## II. PURPOSE & INTENT

First 5 Sonoma County is soliciting proposals from qualified individual consultants and/or agencies interested in providing professional consulting and advisory services for a range of objectives within the scope of the home visiting coordination planning contract between First 5 Sonoma County and First 5 California. First 5 Sonoma seeks a consultant(s) to work in partnership with First 5 Sonoma County's Program Director to achieve the following purpose:

- a) The development and facilitation of a strategic planning process for home visiting and early childhood stakeholders to achieve coordination of the home visiting system in Sonoma County (and related objectives as defined below);

The scope of this project falls under the Home Visiting Coordination Planning contract goals A, B, & C described below.

**Goal A:** Build or strengthen the county-wide vision for how a coordinated local early childhood development and family support system, including home visiting, can address the needs of families impacted by COVID-19.

**Goal B:** Determine scope and effectiveness of existing home visiting programs and family support services designed to help families in crisis, and expand access, as needed, to help families recover from the effects of the COVID-19 pandemic.

**Goal C:** Strengthen (or rebuild) coordination and alignment across home visiting and family support agencies to address the effects of the pandemic on family support systems to help families recover from the effects of COVID-19.

**Under these goals the consultant team is asked to address the following scope of work with the support of First 5 staff:**

**Objective A: Conduct a strategic planning process with key early care sector stakeholders**

1. **Work with First 5 Program Director to develop a framework for strategic planning with key early care stakeholders**

2. Facilitate a strategic planning process with key early care stakeholders, working toward defining a county-wide vision
3. Create a document or report to guide the strategic plan implementation

**Objective B: Environmental Scan (ES)**

1. Conduct a literature review that can support and guide the county-wide home visiting coordination efforts

**Objective B-1: ES- Evaluate geographical areas with concentration of under-resources and underserved families**

1. Review existing data that includes geographical areas of the county that are under-resourced and underserved, including areas with high Medi-Cal birth rates
2. Determine factors that indicate children or families who may benefit from home visiting and other supports for family and child well-being

**Objective B-2: ES- Identify existing home visiting programs and family supports**

1. Determine number and type of home visiting programs (evidence-based vs. promising or innovative practice)
2. Determine number of families who received home visiting services in the most recent year
3. Evaluate the extent to which services provided align with documented needs of families (quantitative data and qualitative with family participant focus groups)
4. Evaluate cultural responsiveness (cultural training/understanding/service delivery methods of providers – including provider focus groups)

**Objective B-3: ES- Identify existing gaps and barriers in home visiting and family supports**

1. Determine the population potentially eligible, but not receiving home visiting services
2. Identify supports that are needed and not being delivered (qualitative and quantitative data – provider and family focus groups)
3. Explore barriers to families accessing home visiting (eligibility/ referrals/ maintaining participation – quantitative and qualitative data including provider and family focus groups)

**Objective B-4: ES- Explore use of data systems between programs and supportive services**

1. Identify data collection and storage methods across home visiting programs
2. Identify all outcomes being tracked across programs
3. Identify common outcomes that are tracked across all/most home visiting programs
4. Lead the collaborative to adopt a set of core outcomes that all or most home visiting programs agree to track
5. Explore the possibility of one shared or common use data system

**Objective B-5: ES- Identify current funding sources and potential sustainable funding sources**

1. Identify all current funding sources for active home visiting programs

2. Review past funding sources and explore reasons those funding sources discontinued
3. Explore potential funding sources (list of qualifications or requirements to receive each)
4. Explore sustainability options (what needs to happen in the early care system to gain sustainability and long-term support for home visiting)

**Objective C: Common Point(s) of Entry**

1. Establish common points of entry within home visiting agencies and across the early care sector that are culturally responsive
2. Gain participation across the early care sector to refer to, or establish home visiting services

**Objective D: Common Intake or Eligibility Screening Process**

1. Establish common family identifiers needed for determining eligibility
2. Create shared intake forms/systems/protocols to establish services for a family
3. Formalize shared intake process
4. Formalize processes/forms/protocols to assess family needs for other family support services, referral, and follow through of services

### III. TERM & FUNDING

*Term:* The maximum term of this contract is up to thirteen months.

*Entire Contract Amount:* The total proposed amount for this contract opportunity should not exceed \$75,000, inclusive of personnel, materials, printing, computer support, travel, and indirect costs. The maximum contract amount is intended to support the completion of, **a) Strategic Planning to coordinate the home visiting system in Sonoma County**, by addressing the Objectives A through D, described above, and is limited to the term of the First 5 California Home Visiting Coordination funding (current contract term ends 6/30/2022).

### REQUIRED & PREFERRED CONSULTANT QUALIFICATIONS

#### Requirements for Consultant

- Lead consultant must demonstrate experience and expertise in developing and facilitating strategic planning processes.
- Demonstrated experience working with community-based, and government organizations in a capacity of facilitation and/or coordination of systems and services.
- Demonstrated experience conducting focus groups, collecting and analyzing qualitative data.

- Demonstrated ability to develop strong professional relationships with a range of stakeholders with differing goals, and ability to guide the stakeholder group toward a common goal.
- Experience working with diverse communities reflective of Sonoma County's population.
- Knowledge of the Home Visiting system in Sonoma County or area with similar demographics.
- Knowledge of early relational health, dyadic services, and early childhood development.

#### Preferences

- Bilingual/bicultural with the ability to communicate in Spanish preferred, but not required.
- Experience in the utilization of Results Based Accountability as a method of tracking and improving indicators.



#### IV. PROPOSAL REQUIREMENTS

##### A. Format

Proposers will submit proposals through a web-based system, *Foundant*. Elements of the proposal will be a combination of 1) text and information entered directly into the system; and, 2) required uploads of PDF and Excel attachments. \*Proposers are recommended to sign into the grants management system before drafting the proposal to ensure formatting and structure are consistent with system requirements.

##### B. Narrative (Limited to 12,000 characters with spaces, approximately 8 pages)

Description of the overall proposal, including firm's general philosophy and approach to Strategic Planning, Systems Change, and/or methodology related to the Environmental Scan as it relates to the objectives described, and how the plan aligns with First 5 Sonoma County's strategic plan and commitment to equity.

##### C. Proposed Work Plan (Limited to a combined 6,000 characters with spaces, approximately 4 pages)

Detailed plan that includes a rigorous, yet realistic project timeline and deliverables, logistics, components, tools and strategies for completion for all objectives. First 5 Sonoma County anticipates the total project length from 9 to 12-months. The work



plan should begin July 2021 and ending no later than June 30, 2022. The work plan should include a description of how each objective will be met, and the anticipated timeframe for meeting each objective. All objectives included in the environmental scan should be completed within 6 months of the contract start date.

**D. Qualifications** (Limited to 3,000 characters, approximately 2 pages)

Provide a description of your firm, including but not limited to the following:

- Firm's history and type of services provided, including number of years the firm and/or lead consultant has provided consulting services, types of services provided, role in service delivery, and description of the firm's experience with non-profit and public agencies.
- Describe project roles and responsibilities for each identified professional through the project scope, and areas of expertise.
- Describe experience in developing, facilitating and supporting implementation of strategic planning processes.
- Provide examples of facilitated system change and/or collaborative work, including a description of stakeholders involved.
- Qualifications for all proposed project personnel.

**E. Budget Workbook: Multi-Year Budget, Fiscal Year Budgets and Budget Narrative**  
(Upload required: Budget Workbook in Excel, Attachment A)

The maximum funding available for the project is \$75,000.

Proposers are required to submit a detailed budget for the full term of the project, and Budget Narrative. Budget information must be submitted through the web-based system on the provided Excel spreadsheet, Budget Workbook, Attachment A, to articulate all direct, indirect and sub-contractual costs to the project. Prior to submission, proposers should review and verify that the details included in individual worksheets in the Budget Workbook match and align exactly across worksheets. Each item in the budget and budget narrative must correlate to specific activities described in the proposal. No costs should be included in the Budget and Budget Narrative that are not described in the proposal, and vice versa.

**Indirect Costs**

Indirect costs are shared costs across an organization whose benefit is not readily identifiable with a specific program or programs, but necessary to the general operation of the organization. The methodology for calculating indirect costs should be explained in the Budget Narrative. If indirect costs are calculated through an overall

percentage of direct costs, then individual indirect costs cannot be also listed as line items, and vice versa.

Costs to be considered “direct” for purposes of calculating indirect include: salaries, benefits, materials and supplies directly related to implementation of the project, travel and sub-contractual costs. Indirect costs cannot exceed 15% of direct costs.

### **Budget Narrative**

In the Budget Narrative tab in the Budget Workbook, explain how costs in the budget were estimated and justify the need for each cost. Use the template to break down each major cost category (i.e., salaries, fringe benefits, equipment, travel, supplies, other direct costs and indirect costs). Provide a brief description of each budget line item in the budget and show the calculations used to derive the costs.

For Personnel, list each job title separately and include employee name(s) (or TBD if position is vacant), gross annual salary, hourly wage, and role in the project. Refer to agency’s benefit package and describe how fringe benefits are calculated in the budget.

Describe and justify equipment, including quantity, cost per unit, and identify the purpose and the individuals who will be using the equipment. For Postage, Supplies, Printing, Travel, and Training, provide a general description, quantity and the number of months.

For employee mileage associated with the project, describe the rate of reimbursement. The mileage rate should not exceed the GSA mileage reimbursement rate.

Describe the method chosen for budgeting indirect costs and how they are calculated.

### **F. References**

Provide references, listing a minimum of three (3) clients whom the consultant has conducted similar services that First 5 Sonoma County may contact. Please include the following information:

- i. Firm Name
- ii. Contact Information
- iii. Brief description of similar work performed

### **G. Resumes**

Include resumes/CVs for all consultants and subcontractors. Upload all documents to proposal submission system as a single PDF.

## **V. PROPOSAL SUBMISSION**



## A. Questions about the RFP

Questions from prospective proposers regarding this RFP are to be directed to [funding@first5sonomacounty.org](mailto:funding@first5sonomacounty.org) by 3:00 pm Wednesday, May 19, 2021. The mail subject line must read: “**RFP Question – Home Visiting Coordination Consultant**”. Questions received via email will be posted with the corresponding answers on the First 5 Sonoma County website by Friday, May 21, 2021 at 3:00 pm.

## B. Submission

Due to the impact of the COVID-19 pandemic, proposals must be submitted electronically via First 5 Sonoma County’s web-based proposal submission system. No hard copies will be required or accepted. Submissions will be received at <https://www.grantinterface.com/Home/Logon?urlkey=f5sc> between May 14, 2021 at 3 P.M. and June 4, 2021 at 4:59 P.M

### **Formatting and Size Limits**

The Foundant system does not have formatting within the application entry system. Information can only be entered as plain text. Formatting such as: **BOLD**, *italics*, underlining, bullets, highlighting, etc. is not available.

If you are working in MS Word (or a similar platform) and using a copy/paste method to enter the information into the application, the pasted text will **not** include formatting, such as: **BOLD**, *italics*, underlining, bullets, highlighting, etc.

Size limits for each text section of the application include character counts. While typing into Foundant directly, the character count will show at the bottom of each section and update as the text is entered.

If you plan to work in MS Word and copy and paste the content into Foundant, the character count of a section in Word can be found by highlighting that section, clicking on **Review** in the menu bar, and clicking on **Word Count**. The statistic title “Characters (with spaces)” is the closest to the character count in Foundant, but may not be exact.

As an example, 2000 characters with spaces in Foundant is the equivalent to approximately one-page double spaced, 12-point font. Because Foundant counts spaces as characters the page count estimates may vary greatly, due to paragraphs and spacing.

\*Using the enter key to provide a space between paragraphs will only count as one character.

Applicants are encouraged to either work in the system, or to enter information into each section before finalizing content to ensure the vital aspects of each section are included within the specified character count.

## VI. PROPOSAL REVIEW AND AWARD PROCESS

### Step 1: Proposal Elements Requirements Screening

Each proposal will be reviewed for the complete and accurate submission of required elements, format and forms as specified in the RFP.

### Step 2: Scoring and Review by Proposal Review Team

Proposals will be reviewed and scored by the ad hoc committee that will be comprised of Commissioners, staff, and individuals with expertise and experience in strategic planning, home visiting systems, capacity building and organizational change, particularly in the nonprofit and government sector. Members of review teams will be carefully selected to mitigate and minimize any real or perceived conflict of interest.

Reviewers will score each item and provide written comments regarding strengths and weaknesses of the proposal. It is critical for proposers to provide complete, clear and specific information in the narrative text of the proposal that is consistent with other information contained in the proposal, such as the budget, budget narrative and staffing competencies.

The review team will discuss their individual scores for each proposal in a facilitated meeting where reviewers will have the opportunity to compare their perceptions and impressions. Individual reviewer scores alone will not determine whether a proposal is funded; reviewers will be encouraged to discuss proposals in the context of First 5 Sonoma County's overarching strategic vision and community context in a facilitated consensus-building process.

Weighted scoring for each component of the proposal is illustrated in the table below.

Proposal Component	Possible Points
Proposal Narrative	30
Work Plan	30
Qualifications/Preferences	20
Cost Proposal/Budget	20
<b>TOTAL POSSIBLE</b>	<b>100</b>

## VII. PROPOSER INTERVIEWS

Reviewers and staff will have the option to recommend that proposers be contacted for an interview to explore specific issues related to the proposed approach, strategies, budget, staffing, or other elements of implementation and potentially negotiate refinements to proposed scope of work within the parameters described in this Request for Proposals.

#### **VIII. INITIAL AWARD RECOMMENDATION LETTER**

An initial award recommendation letter will be sent to all applicants notifying them of the review team's recommendation.

#### **IX. APPEAL PROCESS**

Applicants wishing to appeal the review committee's recommendation have three (3) working days from the date of the initial award recommendation letter to file an appeal in writing. Letters of appeal must be sent electronically to: [funding@first5sonomacounty.org](mailto:funding@first5sonomacounty.org) and addressed to Angie Dillon-Shore, Executive Director.

Grounds for appeal are limited to a violation of a First 5 procedure, law, rule, or regulation regarding this RFP process. Appeals will not be accepted on any other grounds. Mere disagreement with the recommendation or decision is not grounds for an appeal.

Appeals will only be considered if received electronically by 5:00 PM on the third working day from the date of the initial award recommendation letter. The appeal letter will be reviewed by the Executive Director and a decision on the appeal will be electronically sent to the applicant. The decision on appeal is final.

#### **X. AWARDING OF CONTRACT**

The First 5 Sonoma County Commission will award the contract, upon which First 5 staff will enter into negotiations with the selected applicant to execute a formal agreement. The contract resulting from this RFP will include, but will not be limited to, the following terms and conditions:

- Insurance requirements
- Payment structure

#### **XI. RESERVATIONS**

- First 5 Sonoma County reserves the right to cancel the RFP process at any time for any reason, even after review of all the applications, and is not responsible for any expenses incurred by an applicant in developing an application.

- First 5 Sonoma County reserves the right to reduce, amend, and/or rescind this RFP at any time prior to final execution of the contract.
- First 5 Sonoma County reserves the right to negotiate scope of work, budget, and costs with any successful applicant. If negotiations fail to culminate in a contract, First 5 Sonoma County may select another applicant.
- First 5 Sonoma County is under no obligation to award a contract to the applicant that presents the lowest cost. Selection will be made based on overall evaluation of the application and the best interest of First 5 Sonoma County as recommended by the review team and the Executive Director, and approved by the Commission.
- First 5 Sonoma County reserves the right to request clarification from any applicant on their application.
- First 5 Sonoma County reserves the right to accept all or a portion of any application, to waive any minor irregularities in an application.
- First 5 Sonoma County reserves the right to contract with more than one firm. All applications become the property of First 5 Sonoma County.
- All applications will remain confidential until a contract is negotiated, however, because First 5 Sonoma County is a public entity, all applications can become public after all successful contract negotiations.