



REQUEST FOR PROPOSAL (RFP)

Organizational Assessment and Reflection

Release Date: October 19, 2020

Due Date: November 20, 2020 by 12:00 noon

Proposed Funding Amount: Up to \$50,000.00

For more information, please contact:

Lisa R. Johnson
Grants and Contracts Manager
First 5 Contra Costa
grantsandcontracts@first5coco.org

Due to COVID-19 First 5 Offices are closed and staff are working remotely. If you have any questions or need additional information, please use email.

The Commission may, at its sole discretion, reject any or all applications submitted in response to this document. The Commission also reserves the right to cancel this offer at its sole discretion at any time before execution of a Contract Agreement. Any applications, including attached materials, submitted in response to this document shall become property of the Commission.

ORGANIZATIONAL ASSESSMENT AND REFLECTION REQUEST FOR PROPOSAL (RFP)

SECTION: 1 INTRODUCTION

First 5 Contra Costa Children and Families Commission (hereafter “the Commission” or “First 5 Contra Costa”), seeks a consultant to guide its staff and Commissioners through a process of organizational assessment and reflection.

Individuals, consultant teams and firms are eligible to apply.

Up to \$50,000.00 has been allocated for this project for a one-year period. Costs should be reasonable and well justified. **Please review the following materials for scope of work, submission instructions and the criteria for selection.**

All questions about the RFP must be directed to: grantsandcontracts@first5coco.org with the subject line “RFP Organizational Assessment and Reflection Question”. We have identified two opportunities to get your RFP related questions answered. A response to each Q & A Phase listed below will be posted on our website on or before the date given at: <http://www.first5coco.org/about-us/apply-for-funding/>.

- **Q & A Phase 1:** The deadline to submit questions will be on October 23, 2020 at 5:00PM. A response will be posted on the website on or before October 30, 2020.
- **Q & A Phase 2:** The deadline to submit questions will be on November 6, 2020, at 5:00PM. A response will be posted on the website on or before November 13, 2020.

DO NOT contact any other person from First 5 for information about this RFP.

RFP responses are due no later than **November 20, 2020 by 12:00 noon**. Complete applications must be signed by an authority able to legally bind the organization. Due to COVID-19, First 5 Contra Costa is accepting **only** email submissions. Please email your complete RFP packet to: grantsandcontracts@first5coco.org.

RFP submissions received (email timestamp) after the 12:00 noon deadline will NOT be accepted or considered for selection.

SECTION: 2 BACKGROUND

First 5 Contra Costa allocates Contra Costa County’s share of the Proposition 10 tobacco tax to fund programs for children ages 0 to 5. First 5 Contra Costa is governed by an eighteen-member Commission appointed by the county Board of Supervisors. The vision of the organization is that Contra Costa’s young children will be healthy, ready to learn,

and supported in safe, nurturing families and communities. Since its inception, First 5 Contra Costa has invested over \$120 million in local programs and activities.

To learn more about First 5 Contra Costa, visit www.first5coco.org

OUR GOAL FOR THIS RFP

Since First 5 Contra Costa was established in 1999, we have been unrelenting in our vision that Contra Costa's youngest children have what they need to be healthy, ready to learn, and supported in safe, nurturing communities. In the 20+ years that we've been doing this work, we have helped make this possible for many Contra Costa children and their families through the systems and community partners we have supported. In this time, we have also learned a great deal about big, systemic challenges to this vision. Our FY 2020-2023 strategic plan (<http://www.first5coco.org/about-us/commission-info/strategic-plan/>) names two of these challenges, and our goals and requisite strategies aim to address them:

- Challenges:
 - The systems of care for young children and their families are deeply siloed, difficult to navigate, and not always working in alignment with one another.
 - We do not have enough public dollars to fund the early childhood, community and safety net services that are essential to supporting children and families' wellbeing.
- Goals:
 - Strengthen the integration of early childhood systems that foster equitable opportunities and outcomes for all young children and their families.
 - Build on, sustain, and/or grow First 5's investments in the early childhood system of care.
- Strategies:
 - Systems development, including professional and workforce development, adoption of evidence-based practices, standards for high-quality services, and addressing root causes.
 - Stakeholder engagement through, for example, partnership and coalitions and resource sharing with families and caregivers, service providers, partner agencies, residents, elected and appointed city, county, and state representatives, and community-based organizations and nonprofits.
 - Policy advocacy by which we make the case for investing in early childhood and strengthening systems and resources that support children and families to policymakers and their supporters.

We recognize that much of who we are now aligns with who we want to be and what we want to do with our new strategic plan. At the same time, we also humbly accept that there are places where we can strengthen our internal capacity in order to optimize how

we carry out our work into the future. In other words, to tackle these challenges, we have to both draw on our many collective years of wisdom, as well as reimagine and perhaps transform how we use our skills and expertise to serve families in a dynamic, uncertain, and complex environment.

SECTION 3: SCOPE OF WORK AND REQUIREMENTS

To this end, First 5 Contra Costa seeks a consultant to guide its staff and Commissioners through a process of organizational assessment and reflection. Through this work, we want to take stock of who we are and where our strengths lie. We envision that findings from this inquiry will help us identify places where we can develop and refine our structures—e.g., policies, processes, how we organize our work, our teams and our budgets—as well as grow and retain the talent at First 5 that we need to sustain our strategic priorities into the future.

We are open to proposals that would organize the work differently or reprioritize what we have included here, based on consultants' understanding of the work and/or the realities of our budget and timeline.

Bucket 1: Cultivating Staff and Commission Understanding and Buy-In to the Process

For this to be a helpful process for the entire agency, staff and Commissioners alike will need to feel engaged and curious about this process. We envision:

- The formation of an organizational reflection committee that would include staff from different levels of leadership, as well as Commissioners
- Consultant-facilitated meetings for both Commissioners and staff at different points throughout the process

Bucket 2: Taking Stock of Staff and Commission Strengths & Skills

We anticipate unpacking staff and Commissioners' strengths under--but not limited to--the following categories:

- Willingness and competencies in racial equity, diversity, and inclusion (REDI) work
- The norms, values, beliefs, and habits they hold around their work
- The skills and strengths they have that are relevant to our strategic plan

We are explicitly interested in a process for gathering this information that takes an assets-based and appreciative-inquiry approach. We are interested in hearing consultants' ideas for gathering this information, whether via survey, interviews, asset-mapping sessions, or other means.

Bucket 3: Policies and Structural Review

We recognize that who we are and how we work are inextricably linked. We envision some part of this work to include a review of our core procedures and policies, including our budgeting processes, grants and contracts (e.g., who to fund, how to fund them, reporting policies), and human resources policies. From this work, we look to uncover the structural linkages necessary to identify where white supremacy culture gets in our way, remove siloes, and increase cohesion in the planning, implementation, and evaluation of our work. In terms of how we organize our work, and our policies and procedures, how might we best leverage internal skills, competencies, and expertise to 1) optimize teamwork and organizational productivity and 2) embody our commitments to racial equity, diversity, and inclusion?

Bucket 4: Understanding Our Communication Channels

In order to realize the goals we lay out in our strategic plan, we believe that we need to deepen our connectedness across the agency. To begin to understand where our communication channels currently thrive, and where we can strengthen our connectedness, we would like to map how information flows between all of us at First 5, including staff and Commissioners. Examples of the type of data we would be interested in collecting, and then analyzing and visualizing via one or more network maps, include:

- Who staff connect with within the agency and Commission
- The qualities of those connections:
 - Frequency
 - Directionality
 - The utility of those connections

Bucket 5: Recommendations for Implementing Our Strategic Plan

Looking across the above buckets of activities, we hope to surface the strengths and gaps in our capacity to implement our strategic plan. We hope to partner with our consultant to identify priority action steps where we can focus our efforts to best position ourselves for success.

SECTION 4: QUALIFICATIONS & PROPOSAL INSTRUCTIONS

Required Qualifications

First 5 seeks consultants with:

- A minimum of three years' experience guiding local government, county, public and non-profit organizations through the organizational assessment process
- Experience developing recommendations that are right-sized to organizational needs and capacity

- Experience providing thought partnership to leadership and decision-makers
- Experience project managing a range of stakeholders and data collection activities
- A diverse staff and project team with knowledge and experience working with various cultures reflective of Contra Costa County's population
- Demonstrated understanding of and experience working with complex systems change
- Experience surfacing and guiding organizations through issues of racial diversity, equity, and inclusion (REDI)

Proposal Elements and Response Requirements

The narrative must not exceed **10** pages total, not including attachments and required documents. Please organize your proposal according to the following heading:

I. Cover Sheet/Checklist

Include the Cover Sheet/Checklist (Attachment A) with key contact information and a checklist to ensure you have included the required RFP elements. An official authorized to bind the firm to the terms of the RFP must sign the cover sheet.

II. Narrative

Please submit a written narrative of the overall proposal, including your firm's general philosophy and approach to the project.

III. Statement of Firm Qualifications

All responses must include a statement of qualifications, experience and description of the firm and its history. The response should specifically indicate the firm's current and historical expertise in providing the services s identified in the scope of work.

IV. Staff Qualifications

All responses must include names and titles of each individual on the project teams, as well as written descriptions of the individual's experience. All responses must identify the individual(s) who will have primary responsibility for contact and communications with the Commission and/or the organizational reflection committee. Please include staff resumes – for persons who will be the core team for this project and the staff that administers the organization's fiscal system. **Resumes will not count toward the page count limit.**

V. Approach and Timeline

All responses should include a work plan and timeline for performing the services required:

- Describe your approach, components, tools, and strategies to carry out the project
- Provide a project timeline with deliverables that is both rigorous and realistic

VI. Budget (ATTACHMENT B)

The budget for this project is up to \$50,000, with a goal of having an initial set of recommendations by the end of May 2021, in order to inform our plans for FY 2021-22. All responses must include a budget/fee schedule including expected expenses. Respondents may use the attached budget form. Though the use of the exact attach form is not required, all information must be included if a different format is used. Specifically detail staff to be assigned to project and respective hourly rates. It is assumed that the costs will include the salary for dedicated staff and benefits and related expenses. Costs should be reasonable and well justified.

VI. References (ATTACHMENT C)

All responses must include three references for past clients for whom you have conducted similar services and highlight key successes.

VII. Sample Work

All responses must include a sample of data collection tools, an example of interview protocols and an executive summary or findings of a finished report. If there are any examples of network mapping please include them.

SECTION 5: CRITERIA FOR SELECTION

A review panel composed of First 5 Contra Costa staff, Commissioners and community experts will evaluate proposals. The criteria by which each response will be evaluated are as follows:

1. **Applicable experience:** The extent to which applicants demonstrate experience and expertise related to the scope of work as outlined in the RFP.
2. **Demonstration of understanding:** The extent to which the applicant communicates an understanding of the needs described here with documented samples of success.
3. **Demonstration of capacity:** The proposal will be evaluated for feasibility, completeness and capacity to address the scope of work as outlined in this RFP.
4. **Cost/Budget:** The extent to which the costs are reasonable and well justified.

Selection Process

All applications will be reviewed using a ranking tool. Applicants selected for the second phase of the process may be invited for an oral interview.

First 5 Contra Costa reserves the right to approve and verify the qualifications and experience of all staff working under the contract.

SECTION 6: APPEALS

Only respondents who have submitted a response in accordance with this RFP process may appeal the RFP process and must be submitted **within five (5) business days after the “Notice of Intent to Fund” has been posted on First 5 Contra Costa’s website**

at <http://www.first5coco.org/about-us/apply-for-funding/>. Grounds for appeals are limited to the following:

- The RFP evaluation and eligibility criteria were not appropriately applied to the proposal; and/or
- The Commission failed to follow the RFP process/procedures.

Appeals must be in writing and specifically state the grounds on which the appeal is based. Oral appeals will not be accepted. Letters of appeal must be submitted electronically to: grantsandcontracts@first5coco.org and addressed to Ruth Fernandez, Executive Director with a subject line: APPEAL- Organizational Assessment and Reflection RFP

The Commission's Executive Committee will handle all appeals. At this time, all decisions by the Executive Committee will be final and cannot be appealed further. Notification of the final decision on the appeal shall be made in writing to the applicant.

Appeals will only be considered if received by the appeal deadline.

SECTION 7: TIMELINE AND SUBMISSION GUIDELINES

A. TIMELINE

The review and selection process will occur in November and December 2020 with an intended contract start date of early January 2021. This project is planned for six months with a contract term of: January 2021 - June 30, 2021.

B. SUBMISSION GUIDELINES

The RFP narrative components and required attachments shall be submitted as specified and must be signed by officials authorized to bind the applicant to the provisions. All costs incurred in the preparation of this RFP package will be the responsibility of the respondent and will not be reimbursed by the Commission.

Interested applicants should submit their proposal on or before **Friday, November 20, 2020 no later than 12:00 noon** to grantsandcontracts@first5coco.org. Any submissions sent on November 20, 2020 after 12:00 noon will not be accepted.

For consideration, proposals must adhere to the following electronic format requirements:

- **Use 8.5 x 11 inch letter format**
- **No less than 12-point font**
- **No less than 1-inch margins all around**
- **Single line spacing**
- **Include page numbers**

The narrative must not exceed **10** pages total, not including attachments and required documents. A complete proposal package must include the Proposal Elements and Requirements as listed below and in more detail in Section 4: Qualifications & Proposal Instructions.

- **Cover Sheet/Checklist (ATTACHMENT A)** – The cover letter must be signed by an officer authorized to bind the proposing organization.
- **Narrative** – must not exceed 10 pages not including required attachments
- **Statement of Firm Qualifications**
- **Approach and Timeline**
- **Budget (ATTACHMENT B or other format that includes all required information)**
- **References (ATTACHMENT C)**
- **Sample Work**
- **Resumes** - for persons who will be the core team for the project and the staff that administers the organization’s fiscal system. Resumes will not count toward the page count limit.

C. REVISIONS, ALTERATION, ERRORS and INCORRECT INFORMATION

Applicants are solely responsible for all errors or omissions contained in their applications. The Commission will not accept any revisions or alterations to the proposals after the deadline for Proposal submittal unless revisions or alterations are formally requested, in writing by the Commission.

D. WITHDRAWAL OF PROPOSAL BY APPLICANT

A proposal may be withdrawn in its entirety by submission of a written request signed by a representative of the organization. Submit a withdrawal request electronically to: grantsandcontracts@first5coco.org and addressed to Ruth Fernandez, Executive Director with a subject line: WITHDRAWAL- Organizational Assessment and Reflection RFP

SECTION 8: OTHER REQUIREMENTS

To be eligible to apply for funding under this RFP the applicant must meet the following criteria:

1. Be in compliance and good standing with all local, county, state, and federal government entities including but not limited to the IRS, California Secretary of State-Business Programs and the Franchise Tax Board;
2. Satisfactory performance on any contract(s) previously awarded by the Commission.

If selected for funding, Contractor will also be required to:

- Show proof of general liability and worker's compensation insurance (if applicant has employees).
- Indemnify First 5 Contra Costa Children and Families Commission.
- If using a Federal Tax ID Number Contractor will need to submit a copy of Employer Identification Number determination letter from the IRS
- If Contractor's status is a Non-profit Contractor will need to submit a copy of 501c3 status letter from the IRS
- If Contractor's status is a sole proprietor Contractor will need to submit a copy of Driver's License and if using a social security number Contractor will need to submit a copy of social security card

COVER SHEET /CHECKLIST (ATTACHMENT A)

FIRM/ LEGAL NAME:								
CONTACT PERSON:								
ADDRESS:								
CITY:					State:		Zip Code:	
PHONE:				Fax:			Email:	
Proposed Budget Amount:		\$						
Federal Tax Identification Number:								
RFP CHECKLIST								
A.	<input type="checkbox"/>	My firm has a minimum of three years' experience guiding local government, county, public and non-profit organizations through the organizational assessment process and all other required qualifications.						
B.	<input type="checkbox"/>	Cover Letter/Checklist (ATTACHMENT A) – The cover letter must be signed by an individual authorized to bind the proposing firm.						
C.	<input type="checkbox"/>	Narrative						
D.	<input type="checkbox"/>	Statement of Qualifications						
E.	<input type="checkbox"/>	Approach and Timeline						
F.	<input type="checkbox"/>	Budget (ATTACHMENT B)						
G.	<input type="checkbox"/>	References (ATTACHMENT C)						
H.	<input type="checkbox"/>	Sample Work						

Name: _____

Title: _____

AUTHORIZED SIGNATURE: _____

Date: _____

BUDGET (ATTACHMENT B)

The use of this format is not required, but all information must be included, if a different format is used. The proposed budget should not exceed \$50,000. All costs should be reasonable and justified.

Task	Person or persons conducting this task	Est. number of hours	Month of completion
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			

Hourly Rates:

Name	Hourly Loaded Rate

Other Expenses (please explain)	

Total proposed budget	
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REFERENCES (ATTACHMENT C)

FIRM/ LEGAL NAME:

Please list three references for whom you have conducted similar services within the last three years. The references listed below may be contacted by the Commission to substantiate your firm's experience in conducting similar services and highlight key successes.

REFERENCE 1							
Name of Funding Organization							
Address		City		State		Zip	
Contact Person				Telephone Number			
Contract Period				Funded Amount:	\$		
Brief Description of Service Provided:							
REFERENCE 2							
Name of Funding Organization							
Address		City		State		Zip	
Contact Person				Telephone Number			
Contract Period				Funded Amount:	\$		
Brief Description of Service Provided:							
REFERENCE 3							
Name of Funding Organization							
Address		City		State		Zip	
Contact Person				Telephone Number			
Contract Period				Funded Amount:	\$		
Brief Description of Service Provided:							