REQUEST FOR PROPOSALS
Collective Impact Strategic Planning Services

RFP TIMELINE

<table>
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<tr>
<th>DATE</th>
<th>ACTIVITY</th>
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<tr>
<td>February 18, 2020</td>
<td>Release of the Request for Proposals (RFP)</td>
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<tr>
<td>February 27, 2020</td>
<td>Letters of Intent &amp; Written Questions Due by 12:00pm</td>
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<tr>
<td>February 28, 2020</td>
<td>Responses to Questions Posted by 5:00pm</td>
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<tr>
<td>March 9, 2020</td>
<td>Proposals due to First 5 Sonoma County by 5:00pm</td>
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<tr>
<td>March 23, 2020</td>
<td>Recommendation to the Commission for Approval</td>
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<tr>
<td>Early April, 2020</td>
<td>Strategic Plan Services Contract Begins</td>
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First 5 Sonoma invites proposals from individual consultants and/or agencies for services to support strategic planning for collective investments in population level outcomes related to optimal early child development. Consultant(s) will work closely with the First 5 Sonoma County Executive Director and a core cross-agency, cross-system planning team in the following roles:

1) Thought partner and subject matter expert in systems change, integration and improvement;
2) Planning, preparation, convening and co-facilitation of decision-making processes;
3) Development of planning documents and communications; and,
4) Development of competitive funding processes and mechanisms for implementation of the collective impact strategic plan.

In anticipation of and to provide clear guidance and intention for the upcoming planning process, a Strategic Planning Roadmap 2020 (Attachment 1), was adopted by the Commission on January 27, 2020. The Roadmap provides context, goals, purpose, foundational principles, a high-level timeline of planning activities and identifies the key participants for the core planning team.

The Commission is seeking a one year, mutually beneficial independent contract relationship with a qualified consultant/agency to assist the Commission and collective impact partners in our efforts to prioritize needs, develop integrated strategies to achieve our shared outcomes and allocate funding as key elements of a 5-year strategic plan. First 5 Sonoma County has allocated up to $60,000 for this consulting support to begin in early April, 2020 and completion by late March, 2021.
Proposal Instructions and Content Requirements
This section describes the required proposal format and content. Failure to follow the prescribed format may result in rejection of the proposal.

A. Questions and Requests for Clarification
Any questions and/or requests for clarification about this RFP must be submitted via email no later than February 27th, 2020 at 12:00pm to:

Angie Dillon-Shore, Executive Director, First 5 Sonoma County
adillonshore@first5sonomacounty.org

The Commission will provide answers and clarifications via email by February 28th, 2020, 5:00pm to all proposers that have submitted a Letter of Intent.

B. Letter of Intent
All interested parties must submit a Letter of Intent to Submit a Proposal via email by February 27th, 2020, 12:00pm to:

Angie Dillon-Shore, Executive Director, First 5 Sonoma County
adillonshore@first5sonomacounty.org

The Letter of Intent should include email contact information for the Proposer. Proposals submitted that have not been preceded by a Letter of Intent will not be considered.

C. Proposal Format
Narrative sections of the proposal should be typewritten on standard 8½ x 11 paper, double-spaced, one-inch margins, 12-point font. Proposals should be bound together using clips, not staples.

D. Elements of Proposal
1. Proposal Coversheet (see Attachment 2)
2. Detailed summary of qualifications and applicable experience and expertise (max 1 page)
3. Narrative description of how you would complete these services (max 10 pages)
4. Proposed Scope of Work (max 5 pages)
5. Proposed Budget (max 1 page)
6. Work samples (optional)
E. Proposal Instructions

1. Proposal Coversheet: Complete the Coversheet (see Attachment 2). Original signatures must be in blue ink by an individual legally authorized to bind the agency or organization.

2. Detailed summary of qualifications and applicable experience (max 1 page): Provide a brief history of the individual/agency, including number of years of experience/in operation, and demonstrate the Proposer has the qualifications, capability and experience to perform the requirements included in this RFP. Provide a description of the experience and qualifications of any proposed key staff members who will be assigned to this project, including function, level of education, degree and/or license, if appropriate, and a detailed resume for each person.

3. Narrative overview of how the Proposer will deliver these services (max 10 pages): Describe how the Proposer will fulfill the roles of the consultant, as described on page 1 of this RFP. Refer to the specific activities and other aspects of the Strategic Planning Roadmap and describe the deliverables the Proposer will accomplish with the resources available. Identify all major tasks, activities and outputs and describe how they will be achieved, including the timeframe required. Ideally, tasks and activities align with the adopted Strategic Planning Roadmap (Attachment 1).

   NOTE: If the applicant proposes to deviate significantly from what is prescribed in the adopted Roadmap, provide a clear explanation and justification.

4. Scope of Work (max 5 pages): Provide an overview of the proposed scope of work in a table format that includes activities, deliverables and due dates and/or milestones.

5. Proposed Budget (max 1 page): Include and clearly detail all costs, payment schedules, line items categories and/or other related costs associated with the proposal.

6. References (maximum 1 page): Provide contact information for three (3) references that can speak to the quality of similar services you have provided to public and/or nonprofit organizations.

7. Work samples (optional): Proposer may include samples of prior work related to strategic planning, systems change, systems integration, etc. Samples may be documents, images and/or links to media.
F. Commission Contact Information

Any and all communication, including questions and requests for clarification regarding this RFP and Letters of Intent to Submit a Proposal must be submitted in writing via email to:

Angie Dillon-Shore, Executive Director, First 5 Sonoma County
adillonshore@first5sonomacounty.org

All questions and requests for clarification and Letters of Intent must be submitted via email no later than **February 27th, 2020 at 12:00pm**. The Commission will provide answers and clarifications via email by **February 28th, 2020, 5:00pm** to all proposers that have submitted a Letter of Intent.

Selection Process

A selection team consisting of Strategic Planning Advisory Team members and staff will review the proposals. If further information is requested by the selection team, phone interviews may be scheduled during the week of **March 9th**. The First 5 Sonoma County Commission will take action on a recommendation for award and contract at the **March 23, 2020** meeting. Proposers will be notified of the status of their proposal no later than **March 27th, 2020**.

Proposal Submission

By **March 9, 2020, 5:00pm**, proposers must submit both of the following:

1. Mail or hand deliver one (1) original and five (5) copies of the complete proposal to the First 5 Sonoma County office. Envelope or package should be labeled:
   
   First 5 Sonoma County  
   ATTN: RFP – STRATEGIC PLANNING SERVICES  
   5340 Skylane Blvd.  
   Santa Rosa, CA  95403

   AND

2. Email a single PDF of all required proposal documents, including cover sheet, to:  
   adillonshore@first5sonomacounty.org.
STRATEGIC PLANNING ROADMAP 2020:

The First 5 Sonoma County Commission intends to develop a 5-year strategic plan to be implemented 2021-2026. To begin this process, we revisit the original intention and mandate of the First 5 statewide initiative.

FIRST 5’S MANDATE: PROPOSITION 10

In November 1998, California voters passed Proposition 10, the Children and Families Act of 1998. The act levies a tax on cigarettes and other tobacco products to provide funding for early childhood development programs. Revenues generated from the tobacco tax must be used to...

“...create a comprehensive and integrated delivery system of information and services to promote early childhood development...enabling children to be more successful in school and ultimately to give them an equal opportunity to succeed in life.”

Tobacco tax revenues are collected at the state level. Eighty percent of these funds are then allocated to the 58 counties according to annual birth rates. Counties are mandated to utilize tobacco tax revenue to work toward achieving four strategic results:

I. **Improved Health and Development**

Children who are healthy in mind, body, and spirit grow up confident in their ability to live a fulfilling, productive life. Healthy children have sufficient nutrition, health care, nurturing, guidance, and mental stimulation; and they live in families and communities that value them.

II. **Improved Early Education**

The importance of preparing children to succeed in school is critical. Skills that allow one to problem solve and think creatively are developed in early childhood education settings and nurtured through community and parental reinforcement.

III. **Improved Family Resilience**

Successful and strong families are those that are able to provide for the physical, mental, and emotional development of their children. Nurturing parents, as the child’s first and most important teacher, provide the foundation for a child’s ability to create successful relationships, solve problems, and carry out responsibilities.

IV. **Improved Systems**

Navigating complex systems of services, benefits and programs can be challenging for many parents and caregivers with young children. Eligibility criteria, geography, degree of alignment across funders and providers, degree of cultural responsiveness, restrictions on funding streams and many other factors can impact navigability and accessibility.
DESIGNING THE ROADMAP

Proposition 10 requires each county is required to have a strategic plan focused on achieving the above Strategic Results and to update their plan every five years. Over the last ten years, First 5 Sonoma County has been guided by its 2010-2020 plan, updated in 2017, to address the changing landscape.

In August 2019, the First 5 Sonoma County Commission established a Strategic Plan Design Team composed of three Commissioners and senior staff members to develop a proposed design and roadmap for the strategic planning process for consideration by the Commission. The workgroup met four times to design the roadmap.

In January 2020, the Commission launches a 12-month strategic planning process. The process is designed to build off of the key lessons learned in Sonoma and around the state over the last 20 years, as well as the collaborative efforts of key stakeholders of Sonoma’s 0-5 system. The 2017 Update to the current 2010-2020 strategic plan will serve as a jumping off point for the planning. Stakeholders will be engaged for input and feedback throughout the process, while also using the wealth of data that already exists.

**Purpose of the Strategic Planning Roadmap**

1. Chart a clear future pathway that defines First 5 Sonoma County’s strategic priorities, investment strategy, role, and core functions.
2. Adopt strategic priorities that will have the greatest impact on addressing disparities in outcomes for children 0-5 in the county.
3. Reshape the role of First 5 Sonoma County to provide responsive, strategic and effective leadership for the 0-5 system.

**FOUNDATIONAL ELEMENTS: Outcomes**

First 5 Sonoma County has adopted and invested resources towards achieving the four outcomes below, as aligned with the four strategic results of the Proposition 10 mandate. These outcomes will continue to be our North Star as we plan for the next five years.
FOUNDATIONAL ELEMENTS: Principles

Prioritization of strategies will be guided by the following Foundational Principles, which are grounded in current research and aligned with the statewide First 5 Network Strategy.

- Children’s experiences, birth to 5, set the trajectory for their life course.
- Parents and caregivers are a child’s first and most important teachers.
- The entire community benefits from optimal child development.
- The first two years provide the greatest opportunity to maximize the critical and long-lasting impact on a child’s developing brain.
- The best investment of resources is in proven approaches to early prevention and intervention.
- Some children and families need more supports to address structural gaps in opportunity due to racial and economic inequities.

The Role of First 5 Sonoma County

First 5 Sonoma County was re-established as an independent public agency, separate from the County of Sonoma, in July 2019. This structural change has both improved the long-term fiscal sustainability of the Commission and strengthened its position as a strategic systems leader. The Commission will continue to refine and reshape its role to strategically advance the development of a vibrant system for children 0-5 and their families, serving as a catalyst, collaborator, capacity builder and policy advocate by fulfilling the following duties:

- Contribute to a countywide collective impact strategy to ensure all children are ready for kindergarten
- Serve as an intermediary and convener
- Sustain and grow investments to support systems integration, advocacy, policy change and prevention and early intervention service strategies
- Advocate for policy change at the local, state, and national level that supports the well-being of children, 0-5, their parents and caregivers
Strategic Planning 2020
Key Activities & Timeline

DEVELOP
- Planning Roadmap
- Procure consultants
- Communication Tools
- Update LT Finance Model

LANDSCAPE ANALYSIS
- Lessons Learned
- "Data Dives"
- Grantee Outcomes Histories
- Listening sessions
- Study Adaptations

CONVENE
- Strategic Planning Team
- Systems Leaders & Funders re: Collaborative Funding Strategy

DEVELOP
- Equity Framework
- Criteria for Selecting Strategic Priorities
- Recommendations for priority strategies
- Stakeholder RBA Capacity
- RBA Performance Indicators
- Investment Strategy
- Funding Recommendations

REVIEW RECOMMENDATIONS
- Commission retreat
- Make revisions
- Develop Document

ADOPT PLAN
- Public Hearing
- Finalize, publish & disseminate plan

INVESTMENT STRATEGY
- Build Out RBA Dashboards
- Develop Competitive Funding Opportunities
- Design RFPs/RFAs/RFQs for early 2021 release
- Build Provider Capacity in New Investment Strategies

January
- Key Activities & Timeline

April
- Key Activities & Timeline

June
- Key Activities & Timeline

September
- Key Activities & Timeline

December
- Key Activities & Timeline
<table>
<thead>
<tr>
<th>KEY PLANNING ACTIVITIES &amp; TIMELINE</th>
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<tr>
<td><strong>JANUARY - MARCH 2020</strong></td>
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<tr>
<td>• Engage consultant</td>
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<td>• Update Long-term Financial Model</td>
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<td>• Develop a “landscape” analysis that synthesizes all current and relevant data</td>
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<td>• Convene providers to review, analyze &amp; interpret data, ground in practitioner wisdom</td>
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<td>• Conduct listening sessions through FRC Network to gather local parent input</td>
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<tr>
<td>• Develop summaries of programs, current investments, grantee outcomes</td>
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<td>• Develop website page to communicate strategic planning information</td>
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<th><strong>APRIL - JUNE 2020</strong></th>
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<tr>
<td>• Collaborate with Upstream Investments and consultant(s) to build staff, provider and funder capacity in Results Based Accountability framework</td>
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<td>• Research acceptable adaptations of evidence-based programs (current investments)</td>
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<td>• Convene discussions with funders and systems leaders to identify opportunities for collective impact through aligned, leveraged and collaborative funding</td>
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<td>• Raise the bar on discourse on equity through presentation, discussion, and accountability activities with Commission, staff and stakeholders</td>
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<tr>
<td>• Strategic Planning Advisory Team develop a set of priority strategies that are proven to contribute to the four outcomes and maximize opportunities for collective impact</td>
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<th><strong>JULY - SEPTEMBER 2020</strong></th>
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<tr>
<td>• Commission convene to review preliminary recommendations for priority strategies</td>
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<td>• Revise and develop formal plan document</td>
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<th><strong>OCTOBER - DECEMBER 2020</strong></th>
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<tr>
<td>• Present draft strategic plan via public hearing &amp; seek adoption from Commission</td>
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<tr>
<td>• Develop agency-level accountability measures that feed to population measures of shared outcomes and build out RBA dashboards</td>
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<tr>
<td>• Develop co-funded competitive funding opportunities</td>
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<td>• Design RFPs/RFAs/RFAs to conduct procurement of contractors in early 2021</td>
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KEY PLANNING QUESTIONS

The planning process will focus on the following core questions:

- What is the vision for First 5 Sonoma County over the next five years?
- What changes do we need to make to more effectively and sustainably fulfill the Proposition 10 mandate in Sonoma County?
- What are the key needs, criteria and values that elevate priorities?
- What are the evidence-informed/based strategies and initiatives we should employ?
- How can we work with systems leaders and funders to improve 0-5 systems county-wide?
- How do we make early childhood a priority across our public, nonprofit and private systems?
- How do we braid together a diverse portfolio of investments?

STRATEGIC PLANNING ADVISORY TEAM MEMBERSHIP

The Strategic Planning Advisory Team will be made up of 11 individuals drawn from five groups: First 5 Sonoma County staff, First 5 Sonoma County Commission, Cradle to Career Sonoma County Goal 1 Workgroup, Sonoma County Funders Circle and the First 5 Sonoma County Leadership Advisory Roundtable. Team members will possess the following ideal individual personal and professional characteristics:

- Capacity and time to synthesize, integrate and apply the landscape assessment (a complex array of quantitative and qualitative info about the demographics and needs of children and families, outcomes and costs of existing programs & services, etc.)
- Informed by an understanding of how multiple systems work and the levers of change - public, private, community-based
- Positioned to influence monetary and non-monetary resources that drive systems
- Committed to making recommendations through an equity lens
- Committed to set aside personal/organizational interest to achieve collective impact
ATTACHMENT 2

Collective Impact Strategic Planning Services
Proposal Coversheet

Individual/Agency Name
Contact Person
Title
Address
Phone
E-mail

RFP Check List:

_____ Detailed summary of your qualifications and applicable experience & expertise
_____ Narrative overview of how you would complete these services
_____ Scope of Work
_____ Proposed Budget and Budget Justification
_____ References
_____ Work samples (optional)

Authorized Representative:

THE PROPOSER CERTIFIES THAT: To the best of my knowledge and belief, all information in this proposal is true and correct. The document has been duly authorized by the governing board of the applying agency, if applicable.

Name: ______________________________     Title:  __________________
(please print)

Signature:  ___________________________    Date: __________________

This page must be attached to your application. Submit an original and five (5) hard copies of the application to:
First 5 Sonoma County
ATTN: APPLICATION – STRATEGIC PLANNING SERVICES
5340 Skylane Blvd.
Santa Rosa, CA 95403

Email entire proposal with this cover sheet as a single PDF to:
adillonshore@first5sonomacounty.org