



First 5 Alameda County Equity and Strategic Planning Request for Proposals

Application Deadline: Monday, November 9, 2020 at 5:00 PM

Application Information:

1. All sections of the application must be completed.
2. Completed applications should be submitted via email to Equity@first5alameda.org
3. Applications must be received by **Monday, November 9, 2020 at 5:00 PM**. Incomplete applications or those received after the deadline will not be considered.
4. All applicants will be notified by **Friday, January 22, 2021**.
5. A bidders' conference will be held on Wednesday, October 28, 2020 from 9:00 AM-10:00 AM. Questions submitted via Equity@first5alameda.org by Friday, October 23, 2020 will be answered during the bidders' conference. Conference login info: <https://zoom.us/j/96793929551>; Dial in +1 669 900 6833; Webinar ID: 967 9392 9551

If you have any general questions, please email Equity@first5alameda.org.





SECTION 1: INTRODUCTION

First 5 Alameda County (F5AC) is a public entity created by the passage of Proposition 10 in 1998 to help fund early care and education for children age 0-5. F5AC helps young children grow up healthy and ready to learn during the most important time in their development. We have more than two decades of experience funding innovative programs and advocating for policies that produce better futures for our children. The F5AC Commission has adopted the following Vision and Mission statements:

Vision: *Every child in Alameda County will have optimal health, development, and well-being to reach their greatest potential.*

Mission: *In partnership with the community, we support a county-wide continuous prevention and early intervention system that promotes optimal health and development, narrows disparities, and improves the lives of children 0 to 5 and their families.*



The 2017-2022 F5AC Alameda County Strategic Plan is available [here](#).

F5AC is soliciting proposals from qualified consultants in providing professional services for:

- 1) Incorporating equity best practices into our agency's processes, policies, and programs**
- 2) Conducting strategic planning for our upcoming strategic plan, due Fall/Winter 2021**

Please review the application materials for scope of work, application instructions, and the criteria for selection. **Interested consultants should submit their proposal by the deadline to Equity@first5alameda.org.**



SECTION 2: BACKGROUND

F5AC's Organizational Commitment to Equity: Racial, Social, and Economic Justice

F5AC is committed to be an anti-racist organization, and to promoting equity in our work, both internal to our organization and external with the community broadly. Our intention in this engagement process is to center race and do our part to dismantle White Supremacy, recognizing that race is intersectional with other factors, such as economic justice, gender, sexual orientation, ability, etc. More details about our ongoing and evolving commitment can be found in our recent [Resolution on Equity and Justice](#), our [Operating Framework](#), investments as part of our [Community Resilience Fund](#), and [advocacy to our elected delegates](#).



SECTION 3: SCOPE OF WORK AND REQUIREMENTS

Objectives

Below are the components of the work to be done, and **consultants can apply for one or both components (Equity Work and/or Strategic Planning) they feel they can successfully address**. Components were informed by F5AC staff at all levels. The order of work is not indicative of relative importance, but is intended to be sequential, with Equity coming before Strategic Planning.



- *Preference will be given to proposals applying for both components of the work.*
- *Configurations of teams dedicated to the project that are reflective of the diversity of Alameda County are encouraged. Minority- and women-owned businesses are highly encouraged to apply.*

Scope of Work

Phase 1: Agency-Wide Equity Work

Conduct an assessment or audit of equity accomplishments, and areas and a path for improvement.

Equity internal to F5AC (e.g., hiring practices, internship and fellowship programs, outreach and recruitment, professional development, operations, implicit bias, power and decision-making)

Equity for F5AC's external work (e.g., investments, partnerships, program design, research, data, communications)

Engage staff to co-create a shared definition of equity and what we think our Agency's equity work should entail.

Working with teams across the Agency on team building, understanding each other's perspectives, and supporting equity work, including:

- Assess issues of power and privilege, within Agency decision-making structure, roles, and responsibilities.
- Develop and implement a plan and process to respond to equity concerns internally and externally.
- Continue to evolve communication and transparency around Agency priorities, decision-making, and process.
- Support the Senior Leadership Team (SLT) to reach alignment for how we approach the equity work as an Agency, including participation, role, bandwidth/workload, and staffing/resource.

Provide recommendations on a structure for staff engagement (short- and long-term), including representation, roles, time commitment, decision-making:

- Create methods for staff input and participation.
- Facilitate spaces that are conducive to learning and open discussion, and that are restorative in nature.
- Design long-term structures for staff participation.

Create an Implementation Plan based on assessment findings:

- Clear plan for promoting equity internally and in external work, including mission/vision, timeline, strategies, long-term outcomes, short-term goals
- Internal may include:
 - Trainings, workshops, and/or coaching for staff on anti-racism, implicit bias, microaggressions, historical context recognizing that race does not exist in a vacuum, and other issues (e.g., class, homophobia, xenophobia, sexism) are relevant*
 - Assessment tools for staff at all levels to apply equity in their work*
 - Recommendations for investments, changes to policies, procedures, and practices (operations, HR, communications, etc.)*
- External may include:
 - Assessment tools*
 - Recommendations for investments, changes to policies, procedures, and practices*
 - Implications for strategic planning, program design, research, data, communications, policy advocacy, etc.*

Phase 2: Strategic Planning

Stakeholder engagement

Incorporate the learning and implications from the Equity process, support F5AC with stakeholder engagement to inform the development of the Strategic Plan, including:

- Leverage existing input from research, evaluations, communications consulting, and interviews
- Solicit community input, including but not limited to:
 - Parents/Caregivers* *ECE and Child Care Teachers & Providers*
 - Staff* *County and Community Leaders*
 - Philanthropy* *Business Community*
 - Commissioners*

Develop and implement, in consultation with F5AC staff, a strategic planning workplan and timeline that clearly describes process, decision points, milestones and includes the following:

- Funding / resource allocation
- Program design and metrics
- Results / Outcomes (Results-Based Accountability framework)
- Planning for likely implementation/administration of Alameda County Measure C

Lead the writing, design, completion, and delivery of the Strategic Plan:

- Writing / editing in partnership with F5AC
- Graphic design
- Communication and collateral materials
- Commission presentation preparation

Contract Requirements

- **Lead Contact** – Contractor will assign an individual or small team as the lead contact to F5AC to carry out the contract activities identified above.
- **Travel** – It is expected that the Contractor will provide agency automobile insurance coverage or will require individual automobile insurance coverage.
- **Program Orientation** – Contractor’s key staff assigned to the project will receive an overview and orientation to F5AC.
- **Meeting Requirements** – Contractor’s key staff assigned to the project will meet with staff from F5AC.
- **Oversight** – On-going contract compliance oversight will be provided by F5AC.



SECTION 4: TIMELINE, FUNDING

Contract Timeline The term of the contract will be approximately January – December 2021.

Funding Contractor payments will be made based on actual approved expenses and satisfactory work performance of identified deliverables. The maximum award amount is \$250,000, with \$125,000 designated to each component, Equity and Strategic Planning, if applying for only one. **Preference will be given to proposals applying for both components of the work and coming in under the maximum budget;** in this scenario, costs may be flexible between components.



SECTION 5: APPLICATION INSTRUCTIONS AND PROPOSAL REQUIREMENTS

Interested applicants should submit their proposals in the following format—no more than 10 pages (11-point font). Coversheet, résumés, client lists, work samples, budget template, and budget narrative do not count toward the narrative page limit.

Cover Sheet (does not count towards page limit)

Applications will include the following information:

Contact information, including name of the contact person for the application, address, telephone, fax, and email information. An official authorized to bind the firm to the terms of the application must sign the cover sheet.

Narrative

Applicants must submit a written narrative that addresses the elements described in the scope of work and scoring criteria below:

- 10-page limit
- 11-point font
- All pages must be numbered.

Proposed Work Plan

The proposed work plan must address the following:

- Indicate which components of the scope of work the proposal addresses.
- Describe the general approach, tools, and strategies to complete the proposed scope of work.
- Overall plan with deliverables and time estimates for completion of all work is required.

Qualifications and Staffing

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

- Firm's history and type of service provided
- Number of years providing proposed efforts
- Describe roles and responsibilities and include length of employment and years of experience for each identified professional and areas of expertise.
- Configuration of team dedicated to project reflective of diversity of Alameda County

Describe your firm's prior experience and/or familiarity with nonprofit, government, and/or philanthropy, Early Childhood or related field, Alameda County, and relevant issues of equity.

For the component(s) the proposal addresses, provide relevant qualifications and background documents in the following areas:

Equity

- Describe your experience in developing, facilitating, and supporting implementation of organizational culture change initiatives.
- Describe your experience with leadership development, coaching, and support for decision-making.
- Describe your experience designing cross-agency engagement structures and practices.
- Describe your instructional design expertise and experience or theory on adult learning.
- Describe the equity assessment tools to be used for this engagement.
- Describe your understanding of the equity issues in Early Childhood and/or related fields.

Strategic Planning

- Describe your experience facilitating strategic planning processes with like organizations.
- Describe your experience incorporating equity into strategic planning.
- Describe your experience and approach with stakeholder engagement.
- Describe relevant expertise, including:
 - Program design*
 - Financial planning / budgeting*
 - Results-Based Accountability or similar framework*
 - Communications*

Resumes (Does not count towards page limit)

- Provide resumes and qualifications for all proposed project personnel.

Client List/References (Does not count towards page limit)

Provide listings of a minimum of three (3) clients for whom the consultant has conducted similar services. Award is dependent upon reference/client checks; a negative reference is grounds for disqualification. Please include the following information:

- Name
- Agency Name
- Contact Information
- Describe similar work performed

Work Samples that illustrate tools and products representative of the proposed work (does not count towards page limit)

Budget & Narrative (does not count towards page limit)

Provide a cost proposal for providing the scope of work. The cost proposal should include:

- Detailed information on the fee structure, including a list of key personnel and their hourly rates (including overhead costs)
- Cost of proposed service



SECTION 6: PROJECT BUDGET

Project Budget

Please provide a budget of your proposed expenses using the form included at the end of this packet. The budget form and narrative does not count towards the 10-page limit.

Please provide a narrative description of your budget request. (1-page limit)



SECTION 7: SELECTION CRITERIA & SELECTION PROCESS

The criteria by which each response will be judged are as follows:

Narrative: Proposed Work Plan with Timeline

Description, presentation, approach, and timeline (for relevant components)

Approach

- Addresses each portion of relevant component
- Compelling
- Participatory
- Realistic

Narrative: Qualifications & Staffing

Experience and staffing qualifications (for relevant components)

Qualifications of Firm

- Relevant experience
- Team members reflective of and/or with demonstrated experience working with diverse Alameda County communities (race, ethnicity, language, class, etc.)

Relevant Experience

- Experience with like organizations
- Familiarity with Early Childhood or related field, and issues of equity
- Familiarity with Alameda County

Component: Equity

- Experience with equity work
- Experience with relevant methods and tools

Component: Strategic Planning

- Experience with strategic planning
- Experience with relevant methods and tools

Work Samples and Client List/References

Timeline with Deliverables – The degree to which the applicant’s approach and timeline are reasonable and achievable.

Budget – Should be reasonable and well justified.

Interviews – Based on results of interview and staff feedback.

SELECTION PROCESS

All applications will be reviewed by an internal staff committee comprised of a cross-section of staff with Executive, Senior Leadership, Management, and Administrative staff. Selected applicants will be invited for an interview and may be asked to present or share proposed work with staff. Interviews are anticipated to take place on December 16 and 17, 2020.



SECTION 8: OTHER INFORMATION

- No response will be considered for award unless submitted in full, delivered on or before the date specified in this RFP.
- Specifications are carefully prepared describing the services desired. An addendum will be issued to all applicants, if necessary, stating revisions, deletions, or additions to be made to the specifications.
- F5AC 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.
- F5AC reserves the right to reduce, amend, and or rescind this RFP at any time prior to final execution of the contract.
- F5AC reserves the right to negotiate scope of work, budget, and costs with any successful applicant. If negotiations fail to culminate in a contract, F5AC may select another applicant.
- F5AC 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 in the best interests of F5AC as determined by the review team, the Chief Executive Officer, and/or the Commission.
- F5AC reserves the right to request clarification from any applicant on their application.
- F5AC reserves the right to accept all or a portion of an application. F5AC reserves the right to waive any minor irregularities in an application. F5AC reserves the right to contract with more than one firm. All applications become the property of F5AC.
- All applications will remain confidential until a contract is negotiated, however, because F5AC is a public entity, all applications can become public after all successful contract negotiations.
- F5AC shall require indemnification on behalf of itself and Alameda County with any Contractor into which it enters into agreements. In addition, F5AC requires all Contractors to provide evidence of both workers' compensation and general liability insurance, with F5AC listed as additional insured.



F5AC Equity and Strategic Planning

PROPOSED BUDGET FORM

January 2021 – December 2021

BUDGET LINE ITEMS	Proposed Budget
PERSONNEL EXPENSES <i>(List position, FTE % on project, rate)</i>	
Total Salaries	-
Personnel Benefits	
PERSONNEL EXPENSES SUBTOTAL	-
GENERAL EXPENSES <i>(Include brief description)</i>	
Program Materials	
Printing	
Office Supplies	
Staff Travel	
Miscellaneous	
GENERAL EXPENSES SUBTOTAL	-
EQUIPMENT <i>(Itemize equipment costs)</i>	
EQUIPMENT SUBTOTAL	-
SUBCONTRACTORS <i>Requires F5AC prior approval; List separately, if more than one subcontractor (List hourly unit cost, # of hours, term)</i>	
SUBCONTRACTORS SUBTOTAL	-
OTHER EXPENSES <i>(Itemize expenses)</i>	
OTHER EXPENSES SUBTOTAL	-

BUDGET LINE ITEMS	Proposed Budget
SUBTOTAL OF DIRECT EXPENSES <i>Sum of totals for Personnel, General, Equipment, Subcontractors, and Other</i>	-
ADMINISTRATIVE/INDIRECT COSTS <i>Maximum 15% of Direct Costs</i>	
TOTAL BUDGET	-